



ProSystem fx® Workstream

Increase your efficiency on critical work tasks

Powerful Workflow Tools

ProSystem fx Workstream goes beyond meeting your firm's basic needs, offering you a full-featured software program designed to manage all of your work deliverables. Using the latest .Net technology, this powerful program includes project templates for ease of setup, "my views" for the administration of project lists, easy import of government forms, a dashboard for notifications and project assignments, and both standard and custom reporting.

The program also offers the following tools, designed to increase your efficiency:

- Integration with ProSystem fx Time Capture, Billing and Accounts Receivable.
- Reports designed for accounting professionals.
- Strategic notification tools for proactive management.
- Powerful templates to get you started.

Workstream's flexibility and customization capabilities make the program an excellent choice for any size accounting firm.

Complete Scalability for Every Project

In order to be the right product for every firm and for every workflow within a firm, the application must be scalable. Workstream provides scalability at the type, master and projects by allowing the firm to tailor the item to their needs.

- A simple, easy-to-use due date tracking system will keep up with crucial deadlines so you can avoid turning in projects late.
- A full feature project management system with robust features allows you to easily keep track of time spent on projects.

Proactive Management Made Simple

To automate the best practices of our clients, Workstream allows firms to spend less time managing and more time producing deliverables. Proactive management is effortless with tools such as:

- Automatic notifications of project status, including milestone dates as well as budget-to-actual analysis.
- Provides automatic notifications and assignment lists.



Upgrade to Workstream Premier and Take Advantage of Even More Great Features!

Automate Firm Best Practices

Workstream Premier allows integration with other ProSystem fx products, allowing you to utilize the robust features of multiple Suite products, including:

- Integration with ProSystem fx Practice Time Capture, Billing and Accounts Receivable modules.
- Integration with ProSystem fx Tax.
- Integration with ProSystem fx Document.

Workstream Premier's integration allows users to update projects while working anywhere in the Suite.



Problem Oriented Features

ProSystem fx Workstream Premier has all the features you need for managing any size project.

Budget-to-Actual System

- Record actual hours for each step of the budget for financial project reporting.
- Save time and increase firm productivity with the easy-to-use interface.
- Track project progress through trigger notifications that send out time estimates for every project.

Route Sheets

- Customize your own route sheets for staff when working heads down anywhere in the ProSystem fx Suite.
- Increase staff efficiency and productivity.

Workstep Management

- Build out and control each workstep as part of a project.
- Trigger notifications from worksteps.
- Automate service codes linked to worksteps in Time Capture.

For more information on ProSystem fx® Workstream call 1-800-PFX-9998 (1-800-739-9998) or visit CCHGroup.com

The most up-to-date product information, including detailed system requirements, enhancements, and new features, is available at CCHGroup.com/Workstream. If you plan to use multiple ProSystem fx Suite products within the same system, call 1-800-PFX-9998 (1-800-739-9998) and ask to speak to your sales representative about whether or not your system availability is adequate.

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