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Wolters Kluwer

CCH ProSystem *fx* Document

Wolters Kluwer

www.cchgroup.com

From the 2018 reviews of Document Management and Documents Storage Systems for accounting firms.

CCH ProSystem *fx* Document from Wolters Kluwer is a good fit for accounting firms of any size. Designed to be used with other programs in the CCH ProSystem *fx* Suite, the product can also be used as a stand-alone document management solution.

CCH ProSystem *fx* Document is an on-premise application designed to be installed on firm servers and desktops. The application includes a user-friendly interface which can be customized to suit the needs of the user. The product homepage, called Document Central, is where users can search for and access documents, check a document in or out, access a specific client and all of their related documents, and view a list of all available documents. Other options available from Document Central include Recent Files, File Groups, and Checked Out Files. CCH ProSystem *fx* Document's database allows users to search for documents using a variety of criteria including by client, file name, document keyword, class or subclass. In addition, all documents stored in CCH ProSystem *fx* Document are automatically stored in their native format. Users can create a custom file structure for each client by creating the

structure from scratch, or by copying an existing template and then modifying it for

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groups, where similar documents can be stored, making it easy to apply a set policy to each group.

CCH ProSystem *fx* Document also includes a Microsoft Outlook plug-in, making it easy to store emails and other related documents in a client folder. For users that need to scan documents, CCH ProSystem *fx* Scan is available. The product will read, identify, and bookmark each client document that is scanned, with users able to import the scanned documents directly into CCH ProSystem *fx* Document.

CCH ProSystem *fx* seamlessly integrates with the optional CCH Axxess Portal, which offers secure document sharing capability. Users can publish client files directly to the portal, and the portal is bi-directional, so clients can easily upload source documents and other files to the portal as requested.

Firm admins can easily add a series of permissions to all documents, so that only authorized personnel can access a document, with only authorized personnel able to change or edit folder documents.

CCH ProSystem *fx* Document is part of CCH ProSystem *fx* Suite of applications, which offers a variety of on-premise solutions for accounting professionals including CCH ProSystem *fx* Engagement, CCH ProSystem *fx* Tax, and CCH ProSystem *fx* Practice Management. The product also integrates with CCH Axxess Portal and Microsoft Office programs.

CCH ProSystem *fx* Document offers users easy access to Help functions from within the user dashboard. For those needing additional resources, the CCH product support center provides easy access to a variety of tools and resources including a comprehensive video library, a searchable knowledgebase, and a community user forum. Users can access product support via email, chat, or telephone. Remote support sessions are available as well, and users can manage all support requests

through the website if desired. In addition to various training and support options,

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Scan are priced separately.

2018 Rating – 5 Stars

Firm Management

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