CCH ProSystem *fx* Document

www.cchgroup.com

From the 2019 reviews of Document Management and Storage systems for accounting firms.

CCH ProSystem *fx* Document from Wolters Kluwer is well suited for accounting firms of any size. The product is designed to be used with other CCH applications, though it can also be used as a stand-alone document management solution if desired.

CCH ProSystem *fx* Document offers quick access to help functionality from within the application. Users can visit the product Help center to access a variety of getting started resources for new users such as product navigation, working with files, searching for files, and managing entities. A video library is also available, as is a searchable knowledgebase. Product support is available via telephone, email, and

chat, with remote support sessions available as well. Wolters Kluwer offers various

change or edit folder documents.

For those that are looking for a client portal, CCH ProSystem *fx* Document integrates with CCH Axcess Portal, which allows firms to publish client files to the portal. 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.

The product also includes a Microsoft Outlook plug-in that allows users to securely store client emails directly in their folder. For those that wish to scan documents, the product offers easy integration with CCH ProSystem *fx* Scan, with CCH ProSystem *fx* Document able to read, identify and bookmark any client document scanned.

CCH ProSystem *fx* Document offers an excellent selection of document management features including the ability to copy or move any file, the ability to lock a file, and the ability to rename a file. The product also includes version control, with the application automatically saving an updated file as a new version. Users can also view and restore prior versions of any document stored in the application. Another nice feature is the ability to create a firm-wide document retention policy which can determine how long each file must be retained, what files can be deleted, and what files must be archived.

CCH ProSystem *fx* Document is an on-premise application that can be installed on a workstation or server. The product is similar in scope to CCH Axcess Document, which is deployed on the cloud and offers similar functionality. CCH ProSystem *fx* Document's homepage is called Document Central, which offers users a central location to manage all documents. The main button bar at the top of the screen offers access to file favorites with users able to add files and hyperlinks from the button bar as well. The navigation panel displays a list of all available documents for the chosen client and a series of tabs are available for checking files, viewing recent files, synchronizing files, and viewing task assignments. CCH ProSystem *fx* Document also

offers excellent document search capability, with users able to search for documents

document management solution. Pricing for CCH ProSystem *fx* Document can be obtained directly from Wolters Kluwer, with final pricing depending on the addition of add-on modules such as CCH Axcess Portal and CCH ProSystem *fx* Scan, which are priced separately.

2019 Rating – 5 Stars

Firm Management