



CCH ACCOUNTANTS' SUITE
INTEGRATED. INTELLIGENT.

CCH Portal

Protect your clients' privacy and gain a competitive edge.

With the growing international trend toward increased security for electronic document transfer, the use of email for confidential documents is becoming unacceptable.

CCH Portal is a convenient web-based application for reliable and secure file exchange and storage of confidential documents. Files can be easily uploaded, downloaded, transferred to and from clients, and stored in a completely secure environment, with instant access from virtually anywhere.

Now you can maximize the security of sensitive information, and start sharing, storing and organizing documents the smart way.

IMPROVED CLIENT SERVICE

With *CCH Portal*, your clients will experience unmatched convenience through instant access to their documents – including tax returns, financial statements and source documents. Meanwhile, your firm will benefit from reduced overhead and greater efficiency.

Portal helps you and your clients:

- Access vital documents immediately from any location with Internet access via a secure, private repository.
- Organize documents electronically in cabinets and folders that mirror the way you store paper documents.
- Easily upload documents of all sizes without relying on an FTP server.
- Designate files as Read-Only or Read/Write for easier access and greater security.
- Check out documents to prevent other users from editing while they are being updated.
- Maintain previous file versions in the document history.
- Search, filter, and display documents by file type, title, creator, key word and more.

EXPAND COMMUNICATION

With *CCH Portal*, you can share PDF files, Web pages, hyperlinks, Microsoft® Excel spreadsheets, Microsoft® Visio diagrams, Microsoft® Word documents, PowerPoint® presentations, and financial software data files, among others.

For example, your clients can now upload their QuickBooks® files to the Portal, eliminating the need to exchange DVDs.

COLLABORATION MADE SIMPLE

Taking advantage of instant access lets your clients view their documents with minimal effort on the part of your firm.

- **Tax Returns** – With *CCH Portal*, a single mouse click makes an entire tax return available for the client's review. After reviewing the return, your client simply signs the e-filing release and faxes it to you. The return is now ready for electronic filing.
- **Financial Records** – Clients often need the prior two years' tax returns to secure bank loans or for legal purposes. Simply publish the tax returns and source documents to Portal, and your client can securely access them at any time.



CCH Portal

CCH INTEGRATION

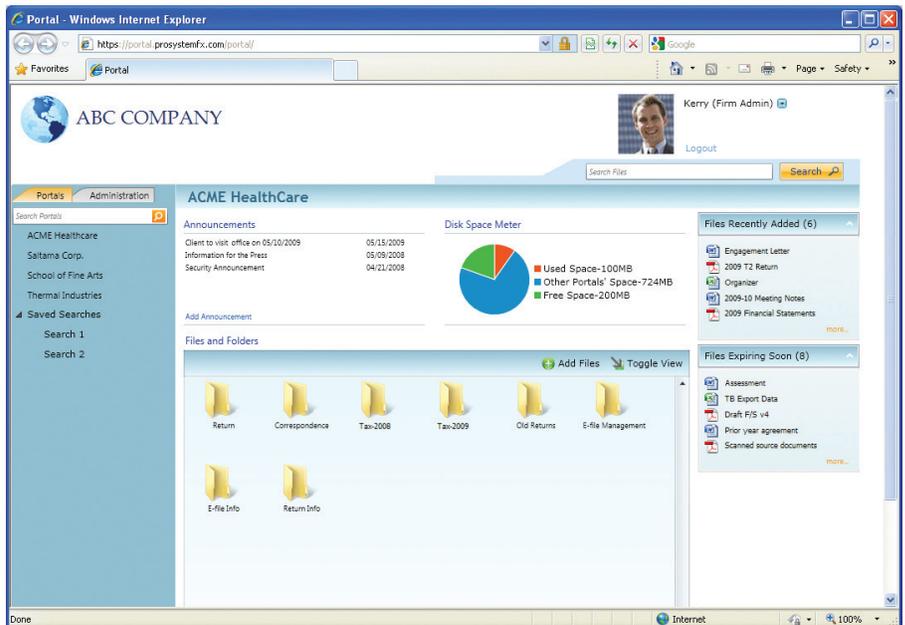
CCH Portal will tightly integrate with other members of the *CCH Accountants' Suite* of products, including *Taxprep*, *CCH Engagement*, and *CCH Document*.

For more information, visit www.cch.ca/Portal or call us at **1 800 268 4522**.

DELIVERING AN OPTIMAL SOLUTION

CCH Portal is a stand-alone solution, meaning that any size firm utilizing any software can use it as a secure, convenient, and effortless way to exchange files and collaborate with their clients. Portal functionality is not limited to sharing files with clients — it can also be used to facilitate collaboration among firm staff and for external business transactions.

In addition to the bi-directional capability, *CCH Portal* also offers you the option to provide secure Client Areas (sold separately). The Client Areas are designed for clients to have a secure portal area for their external business or investment activities. While *CCH Portal* provides access to documents by both client users and firm staff, the Client Area is accessible only by client users. Client Portals can be made available to clients by the firm as a value-add service or to help differentiate their firm from the competition.



TRANSFORM YOUR PRACTICE



**CCH
Accountants'
Suite**

INTEGRATED. INTELLIGENT.

From simplifying day-to-day tasks to enabling you to expand your business, the *CCH Accountants' Suite* puts the resources and tools you need to take your practice to the next level at your fingertips. The products in the *CCH Accountants' Suite* help you leverage information across your practice, which means more effective workflows, increased customer loyalty, enhanced compliance and data security – and much more.

Find out more! Call one of our consultants at **1 800 268 4522** or visit www.cch.ca/accountantsuite for more information.

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