

Using Doc.It with CCH ProSystem fx Engagement

Doc.It® Suite works seamlessly with CCH ProSystem fx Engagement, resulting in increased productivity. Powerful time-saving tools help you stay organized and manage engagements more effectively.



ALL DOCUMENTS AT YOUR FINGERTIPS

A simple Doc.It drag & drop function makes the process of gathering documents and adding them into CCH fx ProSystem Engagement quick and easy.



PDF EDITOR

Doc.It PDF Editor included in Doc.It Suite has hundreds of accountant-specific tick marks, a calculator and the ability to add signatures – powerful tools you’ll use every day. Replaces Adobe at zero added cost.



BATCH PRINT

Create a fully-bookmarked searchable PDF file of the engagement. Search any financial statement produced from CCH ProSystem fx Engagement for a word or phrase (e.g. “construction”), and instantly view a list of relevant financial statements in your system.



DOCUMENT RETENTION

Easily assign retention rules to each engagement project. As projects reach their expiration they can be archived, insulating the firm from risks of holding the data beyond its required retention.



WORKFLOW MANAGEMENT

Manage the assignment, status, and due-dates of any task or project. Optimize workloads, avoid bottlenecks and meet deadlines.

