Version 5.0.506
March 2016

# CCH® ProSystem *fx*®
# ActiveData

This bulletin provides important information relating to CCH ProSystem *fx* ActiveData version 5.0.506. Please review this bulletin carefully prior to installation, and if you have any questions, call Technical Support at
1-800-PFX-9998, option 4.

NEW IN THIS RELEASE – CCH ProSystem *fx* ActiveData

The following features are available in this release:

- Added the "Quick Filter" command to Excel's context menu. This filters the current sheet using the value in the selected cell(s).
- Added the "Quick Summary" command to Excel's context menu. This summarizes the worksheet using the current Excel column as the Group-By field.
- Added the "Quick Find" command to Excel's context menu. This lets you search all open sheets for the value in the current cell. This command also supports fuzzy (Levenshtein distance) matching.
- Added the "Range Math" command to Excel's context menu. This allows you to add, subtract, multiply and / or divide the selected cells by themselves.
- Added the "Copy Row(s) To Sheet" command to Excel's row context menu (the menu you get when you right-click a row number on the left hand side of Excel's grid). This lets you copy the selected rows to the end of another (or new) sheet.
- The Duplicates command now supports fuzzy matching using Same-Same-Similar testing. This allows you to identify similar items using Levenshtein distance matching.
- To help prepare data for fuzzy matching, the Convert Selected Cells command now supports two new conversion functions:
  - Word Normalization and Replacement - this allows you to replace common abbreviations and remove noise words using a user defined list of words stored in a worksheet.
  - Word Sort - this breaks the data up into words and then sorts them. This can be useful in address matching because the numeric portions of the address will end up on the left hand side.
- Added the "Word Summary" command to Excel's context menu. This combines all of the text from the highlighted cells, breaks it up into words and then produces a summarization listing each word encountered and the number of occurrences.
- Added "Create Rightmost Column" option to Split Columns -> Text Columns. This captures the rightmost word from the original column.
- Added "Starts With" and "Ends With" conditions to the Tag Rows By Column Value command.
- Multiple additional fixes including improved support for Excel 2013 and Windows 8.1

TECHNOLOGIES

- No new technologies are introduced in this version

SYSTEM REQUIREMENTS
- 32-bit Microsoft Excel 2010 or later (Excel 2010, 2013, or 2016) or 64-bit Microsoft Excel 2010 or later (Excel 2010, 2013, or 2016)

- Microsoft .NET Framework version 4 or later.

INSTALLATION

CCH ProSystem *fx* ActiveData 5.0.506 can be downloaded from:
http://support.cch.com/updates/ActiveData/

There are two different versions, one for Office 32-bit and one for Office 64-bit. If you are unsure of the appropriate version for you, check to see if your Office installation is either 32 or 64-bit by going into any Office application (Word, Excel, etc.) and checking within the Help menu on Office 2010 (also shown within About Microsoft Word for older versions of Office).

If you do not have a previous version of CCH ProSystem *fx* ActiveData installed, this download will install a trial version that will allow you to use the application for 30 days unless you activate the software with proper licensing.

If you have a previous version installed, you will need to remove it before installing version 5.0.506.

Unless you were using the previous version of CCH ProSystem *fx* ActiveData in a Terminal Services environment, you will not need to re-activate your licensing.

**Important Note for users updating from versions prior to 5.0 directly to the current version (Updates from version 5.0 and above can disregard)**: On Terminal Server machines where previous versions of CCH ProSystem *fx* ActiveData are already in use, licensing will need to be re-activated on all profiles except for the one from which the upgrade is installed. If you are in this situation and need your licenses reset, please contact Technical Support by email at activedata@wolterskluwer.com or by phone at 1-800-739-9998 option 4.

| GENERAL Download Description: | CCH ProSystem *fx* ActiveData 5.0.506 |
|---|---|
| Version: | CCH ProSystem *fx* ActiveData 5.0.506 (3/22/2016) |
| Release Date: | March 2016 |
| File size: | 10.7 MB |
| Approx. Download Time: | 32 minutes at 56 kbps |
| License: | Full Version |
| Platforms: | Windows 7/8/10 |

| Office: | Microsoft Excel 2010 or later required |
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Contact Information
For a demo                                  1-800-PFX-9998, option 1
**Technical Support**                       1-800-PFX-9998, option 4


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