

ProSystem fx Document Program Updates

Version 3.8.1

ProSystem fx Document v. 3.8.1 is now being made available via download. In order to ensure excellent customer service, we are phasing in the release of Document v. 3.8 over the next eight weeks. When your firm is ready to upgrade, please contact Document Technical Support at 1-800-Pfx-9998, option 6, option 1 and you will be provided with download and installation instructions. Please note that no database conversion is required if you are upgrading from Document v. 3.7 to Document v. 3.8.1.

A Document v. 3.8.1 Update Seminar is available for you to learn the enhancements of this release first hand. To register please visit <http://tax.cchgroup.com/training/document-product-training.htm>. There is no cost for this Web-based seminar.

The following is a summary of the enhancements available with this release. For details, please refer to the Release Bulletin.

ProSystem fx Document v. 3.8.1:

Internet Explorer 8 compatibility has been added to ProSystem fx Document. Version 3.8.1 will continue to be compatible with Internet Explorer 7.

Saved Searches allow you to save frequently used searches for future use. Saved searches may be accessed from either the home page pane or from the left navigation pane.

Add Document processes have been streamlined to allow addition of documents via a single screen, eliminating the need to navigate multiple screens.

Scan Document processes have also been streamlined to allow creation of routing slips using a single screen.

User Customized Search Results Lists allow each user to customize how their document and client search results are displayed. If saved, the customized layout will display each time a document or client search is performed.

Auto-Suggest has been added to selected screens, providing suggested results as you type and speeding the lookup process.

Security Reports are now available to assist in managing security access rights.

Alternating Row Colors have been added in all grids, creating a more visually organized layout that makes it easier to locate data on the screen.

Microsoft Office Plug-Ins are now available for Microsoft Word 2007 and Excel 2007 which will allow you to more efficiently work with documents stored in ProSystem fx Document directly from Word and Excel.

Email Management Patch is included with this release which addresses slowness when used with Office 2007. A change has been made to the client caching functionality for Email Management which will also help reduce synchronization times when new clients are added to Document. A change has been made to the way email messages are saved from Email Management to Document.

ProSystem fx Document 3.8.1 is only available for download. A DVD media will not be distributed for this release. The download consists of a standard ISO file which you can burn to DVD or extract to a local storage device. You may download the ISO file using this link.

This update does not require a database conversion. The installation guide and known issues list can be found in the "User Guides" directory at the root of the image. This update is only for systems already using ProSystem fx Document 3.7 or 3.8. If you are not yet using versions 3.7 or 3.8 please contact support for information on how to upgrade to version 3.7. Do not attempt to upgrade from version 3.3 to version 3.8.1. With this release, 3.8.1, a new Document Drive, Document Explorer, and Email Management module are included and required. As always, please backup and verify your database before any upgrade.

Click below to download the install package:

Installation Package

ProSystem fx Document version 3.8.1

32 bit

[Download](#)

64 bit

[Download](#)

If you have any questions regarding this release, please contact Technical Support at **1-800-Pfx-9998, option 6, option 1.**

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