

# CCH Access Document

## Welcome to CCH Access Document 2013-3.5

This bulletin provides important information about the 2013-3.5 release of CCH Access Document. Please review this bulletin carefully. If you have any questions, contact Customer Support at 1-877-977-9739, Option 3. Additional information is available on CCH [Support Online](#).

## New in this Release

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### Windows 8.1 and Windows 8.1 Update Compatibility

CCH Access Document is now certified compatible with Windows 8.1 and Windows 8.1 Update.

### e-fxNews, Notifications and Release Notes Available from the Dashboard

You can now access the e-fxNews and Release Notes that are sent via e-mail and located on the CCH Support site from within the CCH Access Dashboard. No additional login is required. A symbol displays when new notifications are sent, keeping your firm up-to-date on important CCH Access notifications.

### CCH eSign Setup

Users licensed for CCH eSign can now configure their firm to process electronic signatures. This functionality can be enabled within Firm Setup. CCH eSign allows your firm to securely send documents to your clients and obtain their signatures electronically.

### Two-Character Look-up

Within Staff Manager and Client Manager, you can now use as few as two characters for a look-up yielding more results and making it easier to find short names.

### Team Criteria Assignments

You now have more flexibility when selecting team assignment attributes.. The Team Assignments interface has also been made more intuitive.

### Ribbon Option to Configure Notifications

You can now select to configure notifications from the ribbons in Client Manager and Staff Manager.

### Client Access Groups

To better represent the way clients are secured in the Tax application, all Tax modules were consolidated into one node under the CCH Access Tax branch of the Applicable Product Modules tree in the Client Access Group Profile window.

### Look-ups – Report Manager Drop-down

The Report Manager module has been updated with the standard look-up control to improve consistency and performance in the Staff Manager application.

### Staff Manager/Client Manager – Remove Splitter Control Options

Splitter controls were removed from the Staff Manager and Client Manager ribbons to reduce complexity and improve the workflow.

## Technical Corrections

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### **Using Microsoft Outlook Plug-in to Associate an E-mail Address with an Existing Client**

The Office and Business Unit are no longer updated when you use the Outlook Plug-in to associate an e-mail address with an existing client.

### **When Using Three Monitors, Some Windows Open Off-screen**

When using a triple monitor setup, windows will no longer open off-screen if a window was not maximized when it was previously closed.