ProSystem fx® Suite

Welcome to the ProSystem *fx* Suite Release

This bulletin provides important information about the 2009-1 release of the ProSystem *fx* Suite of products. Please review this bulletin carefully prior to installation. If you have any questions, please call Customer Support at 1-877-977-9PFX (9739) or contact support online at http://support.cch.com/suite.

The 2009 software is now available. The following website provides important information about this release: http://support.cch.com/Suite/ReleaseNotes/

By accessing this site you can view such helpful information as:

- Release Bulletins
- Known Issues
- Tax Product Enhancements
- Windows 7 Compatibility Information
- ProSystem *fx* Suite Support Calendar

NEW IN THIS RELEASE

To install release 2009-1 you must run Update Manager on all workstations, even if this is the first installation of the Smart Client on the workstation. This will update the workstation to the latest release.

The following updates are available in this release:

Data Migration

Prior to migrating your data from ProSystem *fx* or Global *fx* Tax, users should first complete the Pro Forma and Recall process for ProSystem fx Tax or complete the Roll Forward process for Global *fx* Tax.

Install

If you have any current year ProSystem *fx* Suite products installed on your system you will need to perform an installation to update your products to 2009-1.   When any ProSystem *fx* Suite program is launched Update Manager will check and detect updates to the program and will prompt you to install. After a successful update of the products you will be required to install Installation Manager. The Installation Manager setup will be started when you attempt to launch any ProSystem *fx* Suite program. A prompt will appear asking to install Installation Manager.   Select Yes and the Installation Manager setup will begin. When completed an Installation Manager icon will be present in the ProSystem *fx* Suite program group.   At this time if Tax was previously installed you will be prompted to install the 2009 Tax product when you try to open a ProSystem *fx* program.

ProSystem *fx* Document

- Entity Lookup - An entity lookup feature has been added to the Recent Entities list. This feature allows users to add additional entities to the list in the left-hand pane and provides the ability to quickly and easily find any entity.
- Recycle Bin - The ability to drag a file over the recycle bin icon on the toolbar in order to delete it has been added.
- Workstream Integration - Users now have the ability to tie files to Workstream projects. Users can assign files quickly using the Project Selection drop-down menu in the Add Files window or by right-clicking on a file and selecting Properties.
- Email Notifications - Email Notifications have been updated to provide more information.
- Routing Queue - The ability to start and stop the Routing Queue has been added. This feature will allow users to use the service only when needed in order to improve workstation performance.