

ProSystem fx[®] Document (SaaS)

Release 2009-4.5

October 2010

ProSystem fx Document (SaaS) Release Bulletin

This bulletin provides important information about the 2009-4.5 release of the ProSystem fx Document (SaaS). 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 on line at <http://support.cch.com/suite>.

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
- ◆ ProSystem fx Suite Support Calendar

Please visit the [Suite-SaaS Application Status](#) webpage to view in real time the current status of any of our SaaS application. The Application Status webpage is updated every 15 minutes. Customers may visit at any time, including when support is closed.

NEW IN THIS RELEASE

ProSystem fx Document

New Microsoft Office Plug-ins Framework (2007 and 2010 32-bit)

- ◆ Provides the framework for the new Office Plug-ins for the ProSystem fx Suite.

ProSystem fx Document Plug-ins to Microsoft Office (2007 and 2010 32-bit)

- ◆ You now have the capability to send files to Document from within Microsoft Word and Excel (2007 and 2010 32-bit), and allows you to open files stored in Document from within Word and Excel.

ProSystem fx Document Plug-ins to Microsoft Outlook (2007 and 2010 32-bit)

- ◆ We have also added the capability to send incoming Outlook e-mails and/or attachments to ProSystem fx Document.
- ◆ Auto-Client Detection - When saving documents, the system will now attempt to anticipate which entity where the user might want to save an email. This feature can be a time-saver. you've selected multiple emails from several different clients and each of their email addresses is stored in their client profile, the system can automatically select the client for you on the Add Files Screen. If one or more of the emails you've selected to save to ProSystem fx Document was sent from an email address which is not stored in an existing Client Profile, you will be prompted by the system to choose the "email address processing options" for multiple emails.