

# ProSystem fx<sup>®</sup> Document (SaaS)

Release 2010-4.2

August 2011

## ProSystem fx Document (SaaS) Release Bulletin

This bulletin provides important information about the 2010-4.2 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

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### ProSystem fx Document

This update for Document (SaaS) includes many enhancements recently released with the Document On-Premise 4.1 update including the following new features:

- ◆ The Portal Conversion Utility allows you to convert your Standalone SaaS Portal environment to the Integrated Portal with Document.
- ◆ View All Files feature, you can now easily view all of the files for a selected entity in any file list.
  - To use, right-click any entity in the entity pane and select View All Files from the context menu.
- ◆ You can now scan files into Document without a routing slip.
- ◆ The Entity File Lookup pane on the Dashboard allows you to quickly view files for a client or other entity.
- ◆ When you search for an entity in the entity list, it is added to the list, its folders are expanded and the files stored at the root are displayed in the file list automatically. If the list is sorted by most recently accessed, then it will appear at the top of the list.
- ◆ When you direct edit and close a file, you can now have the file check-in automatically check in or you can choose to be prompted each time.
- ◆ This user option can be set in Dashboard > User Options > Document > Check-in file.
- ◆ File groups can now be created as shared or private. Shared file groups are visible to all users.
- ◆ You can now arrange the folders in folder templates to display in any order.

- ◆ When viewing a File Discussion, the "Last edited by" and "Posted by" fields display the name of the user instead of the User ID so that you can easily identify who created the discussion post.
- ◆ The file status indicators now have different shapes in addition to the red, green and yellow colors so that colorblind users can easily distinguish between each status.
- ◆ When editing Tax Mappings for Document, you are now prompted to save when you select a different tax system (1040 Individual, 1120 Corporations, etc.)
- ◆ When printing from Foundation Tax to Document, clients are linked so that you do not have to select the client each time.
- ◆ If you have Integrated Portal, you can now create, edit and manage Portal Users on behalf of you clients.