ProSystem *fx*® Document (SaaS)

Welcome to ProSystem *fx* Document (SaaS) 2011-4.11

This bulletin provides important information about the 2011-4.11 release of ProSystem *fx* Document (SaaS). Please review this bulletin carefully. If you have any questions, please call Customer Support at 1-800-PFX-9998 (1-800-739-9998), Option 6. Additional information is available on CCH Support Online.

NEW IN THIS RELEASE

*The following features and enhancements are available in this release of ProSystem *fx* Document (SaaS).*

Globalization and Localization

ProSystem *fx* Document can now operate on computers that use English (United States), English (Canada), or French (Canada) regional settings. As part of this new feature, Document also now supports the French Windows OS and support French special characters for filenames, entity names, and other text.

Client Manager - Portal List View

A new view has been added to Client Manager so that you can easily identify which clients have portals. From the Client Manager window, with Clients selected in the left navigation bar, select the Views option. Then, under the My Views folder select Client Portals. The view will display pertinent client information, including a column that indicates if a portal has been created.

Data Migration Enhancements

To reduce the amount of time required when migrating from ProSystem *fx* Document (Foundation), the following enhancements have been made:

- ♦ The Data Migration Utility to be run from multiple workstations as the same time. The client list should be divided among the workstations running the migration utility and no two workstations can be used to migrate the same set of client files.
- ♦ You can now set the number of versions of each file to be migrated. Migrating only the most recent versions of a file can reduce the amount of storage space required and reduce the time to migrate.

CCH KnowledgeConnect (SaaS) Integration

Files stored in ProSystem *fx* Document can be searched for from within CCH KnowledgeConnect. You can enter a filename or other search text in the search box in the upper-right corner of the KnowledgeConnect home page. Search results can be found on the Document tab in KnowledgeConnect. Results can be filtered by Office, Class and Subclass. This requires Knowledge Connect version 10.2, which is expected to release in September 2012.

Feedback Feature

The ProSystem *fx* Help files now offer a new feedback feature. You can send suggestions for supplementing or improving the help files directly to CCH, without ever leaving the help file. To open the feedback window, click the star button. This button is located at the bottom of each help screen, as shown below:

To see a demonstration of the Help feedback feature, visit
https://www.brainshark.com/cch/vu?pi=zHtzsdxHbz1So4z0&intk=854606739.

ADDITIONAL INFORMATION

You can learn more about ProSystem *fx* Document by visiting our Web site here, or by contacting your local sales representative.

Please visit Customer Support Online to stay updated with the most current information, including updated system requirements, Knowledge Base articles, a complete list of known issues, and FAQs.