

CCH ProSystem fx Document

Welcome to CCH ProSystem fx Document Release 2016-3.4

This bulletin provides important information about the 2016-3.4 release of Document. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

New in This Release

Feedback Enhancements

You now have three links to choose from when submitting feedback:

- *Request a new feature* opens the CCH Access Feedback Forum where you can submit your idea. While you're there, take a look around and vote on ideas submitted by others.
- *Report an issue* opens the CCH Support website where you can create a support ticket.
- *Something I don't like* opens the feedback form to submit your feedback to the Document team.

Print/Export Recycle Bin Content

You can now print/export content from the recycle bin to CSV file format, allowing you to open it in Microsoft® Excel® for analysis or reporting.

New Client Responsible Staff Column

You can now add an optional client responsible staff column to the recycle bin grids. You can choose what client responsible staff will be visible in Recycle Bin Options. The client responsible staff column header reflects that choice.

Remove Entity from List

You can now remove an entity from the left navigation pane by right-clicking and selecting *Remove from list*. This feature was previously available only on the Recent Entities tab.

Attaching PDFs from CCH® ProSystem fx® Document in CCH® ProSystem fx® Tax or CCH® Global fx® Tax

You can now attach a PDF from CCH® Access™ Document in CCH® ProSystem fx® Tax or CCH® Global fx® Tax for electronic filing. Click in the PDF File Name field and then click the Document button in the Attach Files window. The Document window displays a list of PDFs for your client. It is recommended that you link your client prior. If you haven't linked your client, you will be prompted to do so here.

Microsoft® Windows 10 Anniversary Edition Compatibility

Document now supports Microsoft® Windows 10 Anniversary Edition.

Microsoft® Windows Server 2016 Compatibility

Document now supports Microsoft® Windows Server 2016.

Microsoft® SQL 2016 running in SQL 2012 Compatibility Mode

Document now supports Microsoft® SQL 2016 running in SQL 2012 mode.

The Document PDF Converter driver has been updated to add support for Microsoft® Windows 10.

The Document PDF Converter driver has been updated to add support for Microsoft® Windows 10. You will no longer receive the “Printer not activated, error code -30” activation error when using the Document PDF Converter printer driver to convert documents to PDF and save them to Document.

SQL Server® 2012 Standard or Enterprise

Support for SQL Server® 2012 Standard or Enterprise will end November 2017.

Common Updates**Client Notes**

Client notes will be removed from CCH Prosystem *fx* Document in the 2016-4.1 release.

Client Marketing Method

A new field on the Administrative screen of the client profile allows firms to select how they attracted the client to the firm. Firms may customize the methods in client lists. Client reporting by method will be available in a future release.

Client Responsible Staff - Referring Staff and Prospect Owner

Currently, firms may add client responsible staff types in client lists. With this release, client lists also allow the firm to designate one responsible staff type as prospect owner and one responsible staff type as referring staff. A future release will use these designations.

Fixed in This Release

The following have been fixed in this release of Document:

- Clicking the reset button now correctly resets to the default text on the email notifications.
- Un-checking a Document email notification no longer produces an unnecessary warning message.
- When grouping by columns, the scrollbar now remains in place rather than being brought back up to the top.
- A Microsoft® Windows 8 and 10 update caused the color in the entity navigation pane to become a cornflower blue, causing difficulty seeing the entity names. This issue has been resolved.