

CCH ProSystem *fx* Document

Welcome to CCH ProSystem *fx*™ 2017-3.5

This bulletin provides important information about the 2017-3.5 release of Document. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

Note: As with all Document releases, so that we can ensure the best possible upgrade experience, all firms are required to contact CCH Support to schedule your Document installation where one of our experienced Support Representatives will assist with the server upgrade(s) and at least one workstation upgrade.

New in This Release

Document Dashboard Panes

We are now saving the layout changes on the Document dashboard panes. When logging out and back in, the Document Dashboard Panes will retain your previous grid layout.

Office and Business Unit Filter

Beginning with this release, we have added the option to filter your Staff, Client and Non-Client lists to search within a specific Office and/or Business Unit. Office and Business Unit will default to “all.” You can filter by selecting the Office and/or Business Unit from the alphabetical list of Offices and/or Business Units that you have access to. Once the selection is made, your results will be filtered based on the selection. Office and Business Unit selections will be retained the next time you log in.

Partner Name Appended to Individual K-1s

Beginning with this release, when printing individual K-1s from CCH® ProSystem *fx*® Tax, and CCH® Global *fx*® Tax to CCH® ProSystem *fx* Document™ Tax Document, the individual partner name will be appended to the end of the file name in Document. Document Tax Mapping modifications are not needed to see the changes. This applies to new K-1s printed to Document.

Download Hyperlink

Beginning with this release, **Preview the file** is now an option when copying or sending a hyperlink from a file stored in Document.

Clicking the hyperlink for a file in Document opens the Hyperlink File Option window, where you can choose one of three options:

- Download file as read-only – a read-only copy of the file saved to your computer
- Direct edit the file – an editable copy of the file is saved to the Drafts folder in My Documents on your computer, and opened
- Preview the file – a temporary preview file is saved to your computer until you close the preview window, then it is deleted

Microsoft® Windows® 10

Beginning with this release, Document is compatible with Microsoft® Windows® 10 Creators Edition and Microsoft® Windows® 10 Fall Creators Edition.

Adobe® Acrobat 2017 or Acrobat Reader 2017

Beginning with this release, Document is compatible with Adobe® Acrobat Standard and Professional 2017, and Acrobat Reader 2017.

Client Business Code

New codes for 2017 filing are now available in the client profile. If you have any clients with Business Code that is not valid for 2017 filing, we updated the client profile according to the table below.

| Original Code | Original Description | Replacement Code | Replacement Description |
|---------------|----------------------------------|------------------|--|
| 211110 | Oil and Gas Extraction | 211120 | Crude Petroleum Extraction |
| 532290 | Other Consumer Goods Rental | 532289 | All Other Consumer Goods Rental |
| 452900 | Other General Merchandise Stores | 452300 | General Merch, Warehouse, & Supercenters |
| 452110 | Department Stores | 452200 | Department Stores |
| 532220 | Formal Wear & Costume Rental | 532281 | Formal Wear & Costume Rental |
| 532230 | Video Tape and Disc Rental | 532282 | Video Tape and Disc Rental |