ProSystem *fx* Document

Welcome to ProSystem *fx* Document 2013-4.0

This bulletin provides important information about the 2013-4.0 release of ProSystem *fx* Document. Please review this bulletin carefully. If you have any questions, contact 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

Windows 8.1 and Windows 8.1 Update Compatibility

ProSystem *fx* Document is now certified compatible with Windows 8.1 and Windows 8.1 Update.

Two-Character Look-up

Within Staff Manager and Client Manager, you can now use as few as two characters for a look-up, yielding more results and making it easier to find short names.

Team Criteria Assignments

You now have more flexibility when selecting team assignment attributes. The Team Assignments interface has also been changed slightly to be more user-friendly.

Report Manager Look-ups

The Report Manager module has been updated to improve consistency and performance in the Report Manager application.

Client List Report

A simplified Client List report is now available in Report Manager. This report was streamlined to provide faster access to key client information such as a simple address, phone number, or email list for your clients. Also, the Client List report has been renamed **Client Profile Report** to more accurately describe the purpose and use for the report.

Staff Manager/Client Manager – Remove Splitter Control Options

Splitter controls were removed from the Staff Manager and Client Manager ribbons to reduce complexity and improve the workflow.

Technical Corrections

Using the Microsoft Outlook Plug-in to Associate an E-mail Address with an Existing Client

The Office and Business Unit are no longer updated when you use the Outlook Plug-in to associate an e-mail address with an existing client.

When Using Three Monitors, Some Windows Open Off-screen

When using a triple monitor setup, windows will no longer open off-screen if a window was not maximized when it was previously closed.