

ProSystem fx[®] Suite

Portal - Release Bulletin

Release 2009-1

December 2009

Welcome to the ProSystem fx Suite Release

This bulletin provides important information about the 2009-1 release of the ProSystem fx Suite of products. 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 online at <http://support.cch.com/suite>.

The 2009 software is now available. 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
- Known Issues
- Tax Product Enhancements
- Windows 7 Compatibility Information
- ProSystem fx Suite Support Calendar

NEW IN THIS RELEASE

To install release 2009-1 you must run Update Manager on all workstations, even if this is the first installation of the Smart Client on the workstation. This will update the workstation to the latest release.

The following updates are available in this release:

Data Migration

Prior to migrating your data from ProSystem fx or Global fx Tax, users should first complete the Pro Forma and Recall process for ProSystem fx Tax or complete the Roll Forward process for Global fx Tax.

Install

If you have any current year ProSystem fx Suite products installed on your system you will need to perform an installation to update your products to 2009-1. When any ProSystem fx Suite program is launched Update Manager will check and detect updates to the program and will prompt you to install. After a successful update of the products you will be required to install Installation Manager. The Installation Manager setup will be started when you attempt to launch any ProSystem fx Suite program. A prompt will appear asking to install Installation Manager. Select Yes and the Installation Manager setup will begin. When completed an Installation Manager icon will be present in the ProSystem fx Suite program group. At this time if Tax was previously installed you will be prompted to install the 2009 Tax product when you try to open a ProSystem fx program.

ProSystem fx Portal – Stand Alone

- Firm administrators/Portal Administrators access rights can no longer inadvertently delete themselves from the full rights groups.
 - Firm Administrators cannot be assigned to custom security groups
 - Firm Administrators will always maintain access to every portal created by the firm
 - Portal Administrators cannot be assigned to custom security groups
- Portal lookup drop down changed to add auto suggest functionality on the add file screen.
- Batch portal creation using an on screen interface is available for Stand Alone and Integrated Portal.
- Batch Portal creation using a spreadsheet template is available for Stand Alone Portal.
- Tech Support now has the ability to:
 - Change Firm Administrator Email Addresses entered as the Account ID.
 - Send Welcome Email function.

Integration:

- ProSystem fx Tax (SaaS) users now have the ability to publish their returns directly into a Standalone ProSystem fx Portal. They can store their credentials in the User Options, and then when they print the return, they can choose to publish the file to the client's portal.
- ProSystem fx Tax users now have the ability to publish their returns directly into a Standalone ProSystem fx Portal. When users print the returns, they can choose to publish the file to the client's portal.
- ProSystem fx Engagement users now have the ability to publish their workpapers to a Standalone ProSystem fx Portal. This gives them the ability to share information with their clients quickly and securely.

*Print to ProSystem fx Portal Activation – To use this option you must be licensed for ProSystem fx Portal. To activate this option you must run the Portal Interface installation. This is done by running PortalSU.exe from the system Run command: example – ?:\wfx32\portalsu.exe (where ? is the drive where ProSystem fx Tax is installed. Prior to using this process you must also setup the Portal.

This option becomes active during the print process when you choose one of the PDF options. Once the option is selected and you continue with the print process, one of the "Save As" dialog boxes will appear, select the "Save" button. After the "Save" button is selected the process will continue. Next you will be given a ProSystem fx Portal Login dialog. Fill in the appropriate information as requested and select "Login". The Publish File to Portal dialog will then open. Make the appropriate selections, select "Apply to selected" and then select "Publish selected files". This sends the files to the Portal that you selected. You may continue to work on other tasks during the upload process. To close the "Publish File to Portal" dialog, select Close.