ProSystem *fx*® Suite (SaaS)

Welcome to the ProSystem *fx* Suite (SaaS) Release

This bulletin provides important information about the 2009-3 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 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

♦ ProSystem fx Suite Support Calendar

NEW IN THIS RELEASE

To install release 2009-3 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.

ProSystem *fx* Suite-SaaS – Performance Improvements

♦ To improve your experience, we have optimized the data encryption layer for improved server and client communication.

ProSystem *fx* Portal

Release 2009-3.0

Cross Domain Redirect

Users that inadvertently leave off the (s) in the https:// of the Portal URL will now re-direct to the proper URL

Enhancements

♦ Portal 4.0 - Enhancement – Added links from the Portal Home page for Support and Release Notes for Firm Admin users only

♦ Portal 4.0 - Enhancement – Legal Firm Name changes are now allied and passed through to the Application if changed through CCH order processing

Other Items Addressed

♦ Portal 4.0 - Integration - Batch portal creation will no longer create client areas when client area option is turned off in configuration

♦ Portal 4.0 - Portal - Email notifications for 'Request file deletion' are now sent to correct user and sent to the Document user that is approving files for the portal

- Stand Alone Portal: The challenges causing the following message have been addressed: "An error occurred while performing Recycle Bin get".

<u>Release 2009-3.5</u>
<u>Browser Security Settings - IE</u>

- Users are no longer required to manually change Security Settings in Internet Explorer in order to download a file (prompt may appear but can be ignored).
- SSL Mixed Content – Eliminate the SSL mixed content warning (for Chrome and Firefox).

<u>Security Settings and Administration</u>

- Simplified Security and Permissions (User Roles)
- Simplified Portal Access Groups
- ProSystem fx Client ID field now exists in the Portal profile
- Manage Portal - Multi Select to add more than one portal at a time to the manage portal screen and main left tree view.
- Manage Clients' Portal Users – firms can add users to a client's portal, on their behalf
- Firms can now add Client Areas to existing Portals
- Batch Portal Creation Progress Indicator has been added
- Manage Portal – No longer selects the first Portal by default. All are unchecked by default.

<u>Navigation</u>

- Folder Templates - Firms now have the ability to reorganize folders when managing folder templates
- New Folder Icons - New folder icons to indicate folders that contains sub-folders and files
- New folder hover "Folder Tip" – showing number of folders and files within
- Toggle view updated
- Back Button on Add files screen
- Performance
- Search Shorten Search Run time

<u>Notifications</u>

- Any email notification for a file will have the file URL included.

<u>Integrated Portal (Document SaaS with Integrated Portal)</u>

- Users can rename files during approval.