ProSystem *fx*® Suite (SaaS)

ProSystem *fx* Portal Release Bulletin

This bulletin provides important information about the 2009-4.1 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 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

♦ ProSystem fx Suite Support Calendar

Please visit the Suite-SaaS Application Status webpage to view in real time the current status of any of our SaaS applications. The Application Status webpage is updated every 15 minutes. Customers may visit at any time, including when support is closed.

NEW IN THIS RELEASE

ProSystem *fx* Portal

Enhancements:

Optional Simplified Portal interface (not requiring Microsoft Silverlight) is now available.

♦ ProSystem fx Portal now features an optional, limited functionality, simplified login interface alternative for users that experience challenges installing Microsoft Silverlight. The simplified portal login option provides basic upload and download capabilities. For functionality beyond upload and download, users will need to install Silverlight and login using the Standard Full-featured interface.
- Full Featured – Portal URL: https://portal.prosystemfx.com/portal
- Simplified Portal – Limited Functionality Portal Interface URL: https://portal.prosystemfx.com/sui/Login.aspx

♦ Users that navigate to ProSystem fx Portal without Silverlight installed will receive a message to install Silverlight with an optional link to a limited functionality Simplified Portal Login alternative

♦ For updated Training Guides, please contact Training and Consulting at 1-888-224-7377 or visit CCHGroup.com/training

All ProSystem fx Portal customers are encouraged to sign up for e-fxNews or update their current profile in order to receive Portal product alerts.

♦ The following Sign Up for e-fx News section is added to the Welcome Email body
- Sign Up for e-fxNews
  Receive timely product alerts through e-fxNews, the FREE CCH Product Management and Support e-newsletter that reports new updates, releases, and other critical product information.
  To sign-up, go to Support.CCH.com/notes/efxprofile.aspx, select Establish your e-fxNews profile* and follow the easy steps.

Note: e-fxNews is distributed by specific product. If you are already signed up to receive e-fxNews, enter your email address and select Update your e-fxNews Profile to review your profile and ensure that all of the ProSystem fx products your firm uses are selected.

<u>Important updated information regarding the 2009-4.0 release of ProSystem fx Portal:</u>

With the enhancement that provided the ability to attach a file to the Welcome email notifications, firms are encouraged to utilize the attached User Guide template to create their own, branded Guide to meet the needs of their clients. While the default text now refers to a User Guide, it is not included by design.

- ♦ Client Facing User Guide Template, http://tax.cchgroup.com/training/TrainingMaterials/PfxPortalClient/Guide.docx
- ♦ Below is an example of the updated default text of the Portal created email notification:
  - ▪ "<Firm Name> has created a new Portal named <Portal Name> to safely and securely share tax-related files with you. Using the portal is preferred over e-mail for securely sending your confidential financial documents and tax returns. Attached to this e-mail is a Portal User Guide which will teach you how to manage your portal. If appropriate, you can create additional portal users and assign security for those users.

    If this is your first Portal, you will receive two additional e-mails: one e-mail will include your user name and log-in instructions; the other will provide you with a temporary password to log into the portal the first time.

    If you have any questions, please feel free to contact us.

    Sincerely,
    <User who initiated event>
    <Firm Name>"

Firms are encouraged to review all default email notification text and edit to meet the needs of their particular clientele.