ProSystem *fx*® Suite (SaaS)

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

This bulletin provides important information about the 2009-4.0 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

New Folder Level Permissions - You can now grant and deny users or clients access to specific folders within their portal.

New "Getting Started" Wizard - Your clients and users now have an interactive Welcome message and step-by-step help wizard to walk them through basic portal functionality, which includes:

♦ Welcome Message

♦ Creating a Portal

♦ Creating a Firm User

♦ Adding Files

♦ Creating a Portal User

Email Notification Enhancements - Email notifications provide important new information to Portal users.

♦ The new email notification, "File downloaded by portal user", allows selected parties to receive notifications when a portal user has downloaded a file.

♦ The ability to attach Portal User Guides to Portal creation notifications allows firms to add a firm-branded client-facing Portal User Guide to "Portal Creation" notifications and "Portal User Created - Welcome Email" notifications.

♦ An email notification enhancement adds the ability to add one or multiple firm-side Portal approvers to a client's Portal.

♦ An "Email to" option allows you to specify Portal approvers as notification recipients.

OTHER HELPFUL INFORMATION

IT Admin and End-User Training Guides are in the process of being updated. The current versions are available online:

- IT Admin Guide: http://tax.cchgroup.com/email/pfx/ProSystem_fx_Document_IT_Admin_Training_Guide.pdf
- End User Guide: http://tax.cchgroup.com/email/pfx/ProSystem_%20fx_Portal_End_User_Training_Guide.pdf

New - Helpful Brainsharks (Flash presentations) are now available online:

- Client Facing - "Introduction to Client Portal": https://www.brainshark.com/brainshark/vu/view.asp?pi=zI5zwuQqCz1ki5z0
- Firm Facing - "ProSystem fx Portal Update Seminar - Version 1"- Enhancements to Portal included with the 2009-3.5 release update: https://www.brainshark.com/cch/vu?pi=zG7zAQBvVz24kBz0
- Links to the updated guides will be provided to you as they become available.

New - Client Facing "User Guide" Template is available through Support.