

ProSystem fx[®] Workstream (SaaS)

Release 2009-4.5

October 2010

ProSystem fx Workstream (SaaS) Release Bulletin

This bulletin provides important information about the 2009-4.5 release of the ProSystem fx Workstream (SaaS). 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 on line 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 application. 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 Workstream

Views

- ◆ The View System has been updated for performance and usability.
- ◆ Quick search options now give you the ability to create new views based on statutory due date. This statutory due date represents the statutory filing deadline for the overall project rather than for a single form.
- ◆ Paging was added to views so you can select to go to the next, previous, last, or first page. You can also select to go to a certain page. This allows for quicker access to your data.
- ◆ Lookup fields now allow for type ahead so that as you type in a field, the lookup finds any ID or Name that matches what you are typing.
- ◆ User changes to grids within a project or to the size of the project dialog itself are remembered and persist per user so that you only have to make the selections one time.

Notes

- ◆ Notes can be added, viewed, edited, or deleted from a project and route sheet.

Monitored Notifications

- ◆ A new Monitored Notification is available to send a notification to staff a user-defined number of days prior to a project finish date.
- ◆ A new Monitored Notification is available to send a notification to staff a user-defined number of days after a project planned start date when the project has not been started.

Project Masters

- ◆ A new master for 1040 Tax is now available as a due date tracker only. Use this simple master to quickly define projects and begin tracking due dates immediately.
- ◆ A new project master for 990 forms is now available. Use this default master for typical projects using US 990 forms.

Administration

- ◆ Project administrators can now grant view permissions of certain secured data to selected staff members so that only a limited number of staff will have access to firm sensitive data. Amount fields in view or edit mode of a project or route sheet will be shown only if you have Project Financials permission

Status History

- ◆ A View Status History button has been added to the route sheet and ribbon on the main Workstream window. Click to view the status history of the project without having to open the project dialog. This option is disabled if more than one project is selected.