ProSystem *fx*® Workstream (SaaS)

ProSystem *fx* Workstream (SaaS) Release Bulletin

This bulletin provides important information about the 2010-4.2 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 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* Workstream

ProSystem *fx* Tax Integration

From within either ProSystem *fx*Tax or Global *fx* Tax, you are now able to:

◆ Link a return to an existing Workstream project or create a new project. To link to a Workstream project, from within the tax return, select Manage – Link to Workstream Project.

◆ Open and update a Workstream route sheet for the project linked to the current tax return. To open the route sheet, from within the tax return, select Manage – Open Route Sheet.

◆ Automatically open the route sheet when a return is closed. To configure on a per office group basis, within Office Manager, select Configure Applications – Tax Preparation – {office group} - Workstream Options.

◆ Configure single sign-on between Tax and Workstream. To configure, within Tax Preparation, select Options – Interface Options – ProSystem *fx* (SaaS and On-Premise).

Notes

A notes pane has been added to the Workstream project view, allowing you to view all notes for a selected project as well as add, edit, and delete them.

A notes column is now available for Workstream project views. An icon in the notes column indicates that a given project has notes. The icon for resolved notes is different from the unresolved notes icon, allowing you to determine at a glance whether the project has unresolved notes.

<u>Other Improvements</u>

An improved column selection interface assists selecting the columns you want to view. Currently selected columns are segregated from unselected columns. Unselected columns are grouped into logical categories, streamlining the column selection process.

User settings now persist in all workstep grids as well as the dashboard Project Assignments pane. This means the selections you make regarding column selection, column size, column order, dialog size, etc. will be remembered from session to session.

Delete worksteps functionality has been enabled which will automatically delete worksteps if you decide not to use them for a given project.

The Select Forms dialog now remembers the location of the last selected form when selecting multiple forms, greatly simplifying the forms selection process.