

CCH[®] ProSystem *fx*[®] Scan

Welcome to CCH ProSystem *fx* Scan v17.0

This bulletin provides important information about the v17.0 release of Scan. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

New in this Release

CCH[®] ProSystem *fx*[®] Funnel

Funnel made its debut with Scan v16, released December 2019, and it replaces the “print-then-scan” manual workflow. We received an overwhelming amount of feedback and requests for new features. The following enhancements have been added to Funnel:

- When starting a new job, the input and output file paths now default to the location last used. New jobs can also be cancelled before the conversion is complete.
- The Add Target Sheets option has been added. During a new job, Funnel now automatically inserts target sheets in front of each file when this option is selected. Single and multi-page target sheets are added during the file conversion process to save time.
- Each staff user can now save up to 10 favorite specific target sheets each for the 1040 catalog and the 1041 catalog. Additionally, single and multi-page target sheets are now available for quick select options.
- You can now delete or move multiple pages at once. Hold the CTRL key and select the thumbnail image for each page. Then right-click and select delete or clear the selection or drag and drop the thumbnails to a new location.
- Usability in the main window has been improved. Selecting a thumbnail now updates the page in the full-page view. After adding target sheets or moving pages, you now remain in the same location instead of returning to the top of the file. Also, you can now add a new file above or below the current location or at the end of the file.
- The Edit mode option has been added. When edit mode is enabled, Funnel adds placeholders for target sheets and added files. Placeholders are replaced with actual target sheets and files when edits are applied.
- Funnel now prompts for a password when opening a password-protected file.

See the knowledge base article [Overview of Using CCH[®] ProSystem *fx*[®] Funnel](#) to view a video about using Funnel.

Scan Administrator Reset Default Settings

Each year we optimize settings related to Scan for the best performance. However, when the Scan update is installed, we do not change your settings, which may mean that you are not running at optimal performance. Folder settings, such as blank page removal, border removal, and other options can now be restored to original defaults. To do this, go to **Folder Settings**, right-click on a folder, and select Reset to Default. You can also restore the options on General and AutoFlow settings to original defaults. To do this, go to **General Settings** and **AutoFlow Settings**, click the dropdown on top of the tab, and select Reset to Default.

Scan Administrator Default AutoFlow Setting Updated

The Export G&L Transactions to a PDF option in AutoFlow Settings is now selected by default. If this option remains selected, the PDF for gain and loss detail will now attach to AutoFlow files by default.

Microsoft® Excel® Attachments in XLSX Format

All Excel® files attached to an AutoFlow PDF are now saved using the XLSX format. The XLS format is no longer supported.

Search by Client ID when using AutoFlow with CCH Axxess™ Tax

A full Social Security Number (SSN) is no longer required when searching for a return during AutoFlow in CCH Axxess Tax. In addition to being able to search for a return with the full SSN, you can now search by Client ID.

AutoFlow Gain and Loss Summary

In addition to the gain and loss detail, a new sheet has been added to summarize gains and losses by brokerage firm and by short/long-term transactions. The sheet is formatted to import using the default mapping template in Tax.

AutoFlow Summary Added to Diagnostics

A new AutoFlow Summary sheet has been added to the Diagnostic workbook. The summary reports who performed AutoFlow, reveals the number of forms validated, and other pertinent AutoFlow information.

AutoFlow Attachments renamed to include Return ID

All AutoFlow attachments to the bookmarked PDF file have been renamed to be specific to the client, rather than generic file names that have to be renamed each time they are detached and saved separately.

Additional Form

Form 1099-NEC has been added in the 1040 catalog.

Installing Scan

Online Software Delivery

We deliver all software exclusively through downloads. For more information on online software delivery, including FAQs and system requirements, please visit <https://Support.CCH.com/Online-Software-Delivery>.

Catalog updates are available via the Scan Support website or through automatic updates in Scan Administrator. They are delivered weekly, as needed, from January through April 15. Our policy is to support forms for the current tax year and the two prior tax years immediately preceding it. This policy ensures accuracy and minimizes catalog size and download times.

Please refer to the Scan system requirements page on CCH Support Online for additional information.

Installing Scan Administrator

If you are updating from a previous version of Scan, the installation automatically detects a previous version of Scan and removes it.

Note: Scan is memory and CPU intensive. We recommend that you do not install Scan on a server or workstation that houses other critical applications, as it will degrade the performance of the other applications. Scan can be installed on a high-end workstation, if necessary, to avoid this issue. Import, export, and archive folders can be located on a separate server or file share.

Microsoft® .NET Framework 4.8 must be installed on the server or dedicated workstation running Scan Administrator. If you have not already installed .NET Framework 4.8, it is installed for you during the installation process.

The following steps guide you through installation of the Scan Administrator program files if you do not use a Scaled Server installation. If you use a Scaled Server installation, please contact Customer Support at 1-800-PFX-9998 (1-800-739-9998) for assistance.

1. Log in to the server or dedicated workstation where you plan to install Scan. Verify that your account has Administrator rights.
2. Download and launch **prosystem_fx_scan_17.0.0.7.exe**.
3. Click **Next**.
4. Review the License Agreement.
5. Click **I Agree**.

6. If needed, change the destination folder where Scan should be installed by clicking **Browse** and navigating to or entering a new location. The default import, archive, and export folders are added to the Scan shared folder as part of the installation process.
7. Click **Install**. Wait for the installation to complete.
8. Select the permission key option for this installation.
9. Click **Next**.
10. Click **Finish**.

Installing Scan Workstation

If you are updating from a previous version of Scan Workstation, the installation automatically detects the previous version of Scan Workstation and removes it.

Microsoft® .NET Framework 4.8 must be installed on each workstation running Scan Workstation. If you have not already installed .NET Framework 4.8, it is installed for you during the installation.

To install the Scan Workstation program files, do the following:

1. Browse to \\<computer name>\Workstation.
2. Launch **ProSystem fx Scan Workstation.exe**.
3. Click **Next**.
4. Review the License Agreement.
5. Click **I Agree**.
6. If needed, change the destination folder where Scan Workstation should be installed by clicking **Browse** and navigating to or entering a new location.
7. Enter the Scan Main Server Machine Name where Scan Administrator is installed.
8. Click **Next**.
9. Click **Install**. Wait for the installation to complete.
10. Click **Finish**.

Installing PDFlyer

Install PDFlyer on workstations licensed for Adobe® Acrobat® DC (Continuous and Classic tracks). PDFlyer will not run with Adobe® Reader®.

Microsoft® .NET Framework 4.8 must be installed on each workstation running PDFlyer. If you have not already installed .NET Framework 4.8, it is installed for you during the installation.

To install the PDFlyer program files, do the following:

1. Browse to \\<computer name>\Workstation.
2. Launch **ProSystem fx PDFlyer.exe**.
3. Click **Next**.
4. Review the License Agreement.
5. Click **I Agree**.
6. If needed, change the destination folder where PDFlyer should be installed by clicking **Browse** and entering a new location.
7. Click **Install**. Wait for the installation to complete.

8. Click **Finish**.