Customer Guide

Welcome to ProSystem *fx*® Practice Management!

CCH, a Wolters Kluwer business, welcomes you to ProSystem *fx*® Practice Management.

It is our commitment and goal to continue to improve the overall value of the products and services we provide. If we can be of assistance to you, please let us know. You can reach us at **1-800-PFX-9998**.

This guide was created to assist you when migrating to ProSystem *fx* Practice Management. While the extensive features included with this NEW application have been designed to improve your workflow and business processes, this means that the way you use your practice management software will change. This guide specifically highlights the differences that you need to be aware of before using the new software.

Coordinate the timing of your migration with your regular office workflow schedule. Because of the changes to the database you cannot return to CPAPractice Manager once you migrate to ProSystem *fx* Practice Management. We are here to help you plan and to assist with any questions you might have during this process.

Review the information in this guide before performing the software installation and migration steps in the *Installation Guide*. The *Installation Guide* is also on the installation CD. This guide is in Adobe Acrobat (PDF) format and is named install.pdf.

These guides have been included to assist with your installation:

Installation Guide - Designed for the IT group who will be installing the software.
Customer Guide - Designed for the System Administrator of firms that will be migrating from CPAPractice Manager.

BEFORE YOU BEGIN: Use the Customer Guide to familiarize yourself and your firm with the **changes in ProSystem *fx* Practice Management**. Becoming acquainted with the changes can help you set the expectation level for partners and timekeepers in your firm. **You will find that many tasks and options are identical to those in CPAPractice Manager. You will also find that other options have been enhanced.** While ProSystem *fx* Practice Management was built on the solid foundation of CPAPractice Manager it includes features now available with our new technology. While the new software will look familiar to you, take note of what has changed before installing.

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Plan your migration to ProSystem *fx* Practice Management before you install. Because of the changes to the database you cannot return to CPAPractice Manager once you migrate to ProSystem *fx* Practice Management.

Check this section of the *Customer Guide* for information you will need **PRIOR** to beginning your firm's migration.

Minimum Requirements

Server (a computer working in a server capacity)

- **Processor**
  2.4 GHz Intel Pentium-class processor, or an AMD Opteron, AMD Athlon64 or AMD Athlon XP processor

- **Operating System**
  Microsoft Server 2003 Standard, Enterprise, or Datacenter editions with SP2 or later
  Windows Server 2003 Web Edition SP2
  Windows Small Business Server 2003 with SP2 or later
  Windows Small Business Server 2008
  Windows Small Business Server 2011
  Microsoft Server 2008 R1 SP2 and R2
  Microsoft Server 2012
  NOTE: Windows 9X, Windows Millennium Edition, Microsoft Windows NT® 4.0 and Microsoft Windows 2000 are not supported.

- **Memory**
  1 GB+ recommended

- **Server Hard Disk**
  300 MB

Client (a computer not working in a server capacity)

- **Processor**
  800-megahertz (MHz) Intel Pentium-class processor, or an AMD Opteron, AMD Athlon64 or AMD Athlon XP processor

- **Operating System**
  Windows XP SP3 (Windows XP Professional is required to run ASP.NET)
  Vista Business Edition and above

Windows 7 Professional Edition and above
Windows 8, Pro, and Enterprise Editions
NOTE: Windows 9X, Windows Millennium Edition, Microsoft Windows NT®
4.0, Windows 2000, and Windows 8 RT are not supported.

- **Memory**
  512 MB of RAM (or higher) recommended

- **Workstation Hard Disk**
  150 MB

- **Remote Workstation**
  711 MB additional disk space
  1 GB of memory recommended

Databases Supported

- SQL 2005, SQL 2008, SQL 2008 R2, and SQL 2012

- MSDE and SQL Server 2005 Express, and SQL 2008 Express

Display

- 800 x 600 or higher resolution with recommended system colors of 16, 24, or 32 bit

- DPI at 96. DPI up to 144 is supported for Invoicing and Statements.

- 1024 x 768 or higher resolution required for Dashboard and Report Writer

Other

- Microsoft Internet Explorer 6 or later is required

- Microsoft Office 2003, Office 2007, Office 2010 Standard OEM (32 bit) and Office
  2010 Professional (32 bit) are supported

- Microsoft Office 2010 OEM and Professional (64 bit) are supported (Note: Coolbar
  and Mail Monitor are not compatible with Microsoft Office 64 bit)

- Install the latest Windows service packs and critical updates from the Windows
  Update site

Migration Overview

Migrating to ProSystem *fx* Practice Management is a five-step process that should be performed in the following order:

1. **Prepare for the migration to ProSystem *fx* Practice Management.** See the "Checklist" for complete information. **Do not begin the installation until you have completed the checklist**.

2. **Install ProSystem *fx* Practice Management on the server.** This step should be completed by your firm's IT group. See the *Installation Guide* for more information.

3. **Set up individual workstations.** This step should be completed by your firm's IT group. See the *Installation Guide* for more information.

4. **Update your current database.** After you install and run workstation setup run **versiondb** to migrate your CPAPractice Manager database to ProSystem *fx* Practice Management. See the *Installation Guide* for more information.

5. **Verify your SQL backup procedure**s. Procedures for backing up have changed. See the *Installation Guide* for more information.

Checklist

Follow this checklist when migrating to ProSystem *fx* Practice Management. Make sure you have completed all steps before installing your new software.

Note any Add-ons and Interfaces	**Does your firm use any add-ons in CPAPractice Manager?** If so, see "Add-ons and Interfaces" for information on availability. You may want to schedule your migration after the features you use are available.
Prepare Firm Data	**Release all time (Online and Remote), check in or cancel all Remote Billing files, and post all time and invoices. Run a Data Integrity Report.** In ProSystem *fx* Practice Management all unreleased and released time is stored in the Firm database. User databases are no longer used for online workstations and information stored in them will not be transferred over to the Firm database when you update your database.
	If you have staff members running Remote/Never Connected, all information must be exported and sent to the home office before installing. Remove any shortcuts and/or program files on these workstations to keep staff members from inadvertently logging into CPAPractice Manager by mistake once you've installed ProSystem *fx* Practice Management.

Identify server and database	**Identify your SQL database server name, and (if you are using a SQL/MSDE version of CPAPractice Manager) the database name.** The database server is the server where your data will reside. Go to **Help/About** in CPAPractice Manager and note the Host Server and Host Database names. Right-click and print this information. Do not start the migration until you know the name of the database server and the database name. Check with your System Administrator if you cannot locate this information.
Print Report Wizard Reports	**Reports that you have created with the Report Wizard in CPAPractice Manager will not be transferred to ProSystem *fx* Practice Management.** We have expanded the number of standard reports in ProSystem *fx* Practice Management.
	Print out any Report Wizard reports prior to migrating to ProSystem *fx* Practice Management and note any report parameters.
	If you have created reports with the Report Wizard, please check the treeview sort options for the standard reports after installing ProSystem *fx* Practice Management. You may find that the sort option you need may already be provided for you with a standard report.
	If you need to re-create a report, use ProSystem *fx* Practice Management's NEW Report Writer.
Make a List of Report Queues	**Report Queues will not be transferred to ProSystem *fx* Practice Management. All Report Queues must be set up in ProSystem *fx* Practice Management as there is no migration**.
	Make sure you have a list of all Report Queues and the reports they contain before migrating to ProSystem *fx* Practice Management. You will also need the report criteria and sorts.
Print Statement Headers and Footers	**Statement Headers and Footers MAY need to be re-entered due to changes in the RTF file processing**.
	Print all Statement Headers and Footers prior to migrating to ProSystem *fx* Practice Management.
	The editor has been redesigned to conform more

closely with RTF (Rich Text File) standards. Because of these changes some headers and footers created in CPAPractice Manager may format with differences when printed or opened with the new editor. We recommend that you review all headers and footers and either edit or re-create them if necessary.

Print Invoice Headers and Footers	**Invoice Headers and Footers MAY need to be re-entered in Administration due to changes in the RTF file processing.**
	Print all Invoice Headers and Footers prior to migrating to ProSystem *fx* Practice Management.
	The editor has been redesigned to conform more closely with RTF (Rich Text File) standards. Because of these changes some headers and footers created in CPAPractice Manager may format with differences when printed or opened with the new editor. We recommend that you review all headers and footers and either edit or re-create them if necessary.
Print Dunning Letters	**Dunning Letters MUST be set up in ProSystem *fx* Practice Management as there is no migration for these letters because of tool changes.**
	Print all Dunning Letters prior to migrating.
	You will need to re-enter these letters when you set up ProSystem *fx* Practice Management.

Remote Billing

Does your firm use **Offline Remote Billing**? Offline Remote Billing is not available in ProSystem *fx* Practice Management. In .NET technology you may bill offline through a VPN. If you would like to use this feature, contact Support about running offline remote billing in a test environment after you migrate.

Add-ons and Interfaces

Does your firm use the optional **Microsoft® Outlook Interface Add-on** or **Palm Pilot Time Entry**? Upgrading this functionality to ProSystem *fx* Practice Management is currently not available.

If you have any questions about the availability of certain features used by your firm, contact your sales representative for more information.

Database Changes

We are happy to report on this release of ProSystem *fx* Practice Management that your custom solutions should still run if your firm is on CPAPractice Manager 2002.20.02 or higher. Because we know you value any custom solutions you may have developed (for example, Access Reports), we refrained from making database table changes.

After installation you will run **versiondb** on your CPAPractice Manager database to migrate to ProSystem *fx* Practice Management.

Individual user databases are not used in ProSystem *fx* Practice Management.

- All unreleased and released time is stored in the HOST database until it is posted and moved to the WIP Table. This allows you (or the administrator) to access your data entries from a location other than the workstation on which the time and expenses were originally entered.

- The only exception is for Remote users, whose unreleased time is stored in an Instance on their remote workstations.

- Unreleased time will now be accessible from ALL desktops simply by logging in to ProSystem *fx* Practice Management as that employee. The administrator can edit or release time entries if the staff member who entered them is unable to do so.

Note in the Migration Checklist that all online and remote employees must **release all time prior to installing** ProSystem *fx* Practice Management. As System Administrator you must also **post all time and invoices prior to installing**. CPAPractice Manager user databases will not be checked when you run **versiondb** and any unreleased time or expense entries in the user databases at your firm will not be accounted for.