CCH® ProSystem *fx*® Practice Management Mobile Time

Welcome to CCH® ProSystem *fx*® Practice Management Mobile Time

This release notes document provides important information about the new product launch of CCH® ProSystem *fx*® Practice Management Mobile Time. Please review this information carefully. If you have any questions, contact Customer Support at 1-800-739-9998, Option 3, then 5. Additional information is available on CCH Support Online.

Product Overview

CCH® ProSystem *fx*® Practice Management Mobile Time (Mobile Time) is a new mobile app for iOS and Android phones that gives Practice Management users a new tool to manage time and expense entries while they are away from the office. Making Mobile Time a part of your Practice Management workflow will go a long way in improving the efficiency of your billing process.

For this initial release, Mobile Time provides four key features that extend your Practice Management workflow.

Time and Expense Entry
Add new time and expense entries for your current projects and review the transactions already added. The Time & Expenses screen displays a weekly calendar with detailed information about released and unreleased entries. Billable and non-billable hours are displayed at the bottom of the screen to provide insight into your weekly productivity.

Adding new transactions is as simple as tapping the + icon in the upper left-hand corner. Since Mobile Time synchronizes with your Practice Management database, you have access to up-to-date client and project statuses as well as service codes. Any transactions you add or update on either your mobile phone or your desktop will be automatically synced so it is up to date in both places.

Release Entries
Review your unreleased transactions before you mark them as released. The Release Entries screen provides a detailed list of unreleased transactions so you can edit or release them at will.

Posted Hours
Make sure your transactions have been posted by reviewing weekly summaries in the Posted Hours screen. Here you will see a weekly calendar of billable and non-billable hours for each day. Simple date navigation allows you to review weeks or months in the past.

Contacts
Access all available client contact information no matter where you are. The Contacts screen allows you to search your Practice Management database for contact information when you need it most. Both Client firm as well as firm contact telephone numbers, email addresses, and physical addresses can easily be activated with a single tap to provide instant phone calls, emails, or turn-by-turn directions.

Getting Started with Mobile Time

Preparing for implementation
Mobile Time requires web services to be installed and configured on your Practice Management server to allow the server to communicate with each device using Mobile Time. After you purchase Mobile Time, one of our IT consultants will schedule a short session to complete this task.

Before implementation, however, there are a few technical requirements that must be met:

- The May release of ProSystem *fx*® Practice Management (2017.17.01) must be installed.

- An open port will need to be opened on your network firewall with an SSL certificate bound to that port. Our IT consultants can walk your IT manager through this process.

- A public domain must be purchased.

- Employees expecting to use Mobile Time must assign a password to their account if they have not previously done so.

Configuring ProSystem *fx*® Practice Management to use Mobile Time
Apply your Mobile Time licenses to individual employees by following these steps in ProSystem *fx*® Practice Management:

1. Navigate to Administration > Employee Setup and select Employee Mobile Time Setup.

2. Check the box next to each employee to select them for Mobile Time.

3. Save your changes.

Downloading and configuring the mobile app
To install the software on your mobile device, simply search for "CCH Mobile Time" in the app store of your choice. Mobile Time is compatible with iOS and Android operating systems.

After initially logging in to Mobile Time, users with compatible devices can choose to log in to the app using their fingerprint.