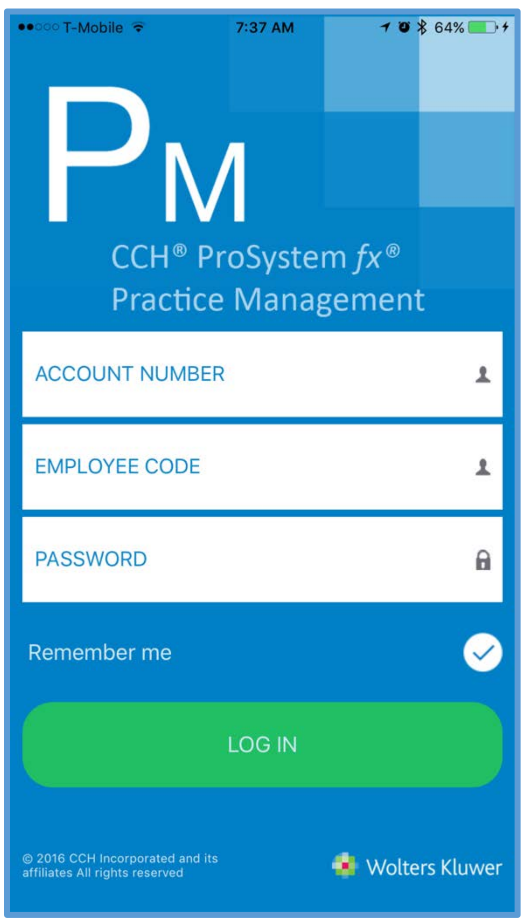
CCH® ProSystem *fx*® Practice Management

Mobile Time Guide



What are the server requirements for Mobile Time? Firms need an SSL certificate, 2017.17.01 or higher release of Practice Management, and a public domain to install Mobile Time web services on their server. When ordering Mobile Time licenses, an IT consulting session is required to configure the web services for Mobile Time.

Mobile Time and Practice Management

- Enter time and expense in either Practice Management Time Entry or on your mobile device using Mobile Time. All entries can be seen in Practice Management and in Mobile Time.

- Enter edits or deletions in either application. The results can be seen in either application.

- Release time and expenses from either application regardless of the origin of the entry.

- View transaction summaries regardless of the origin of the entry.

How do I set up employees to use Mobile Time? Log in to Practice Management. Go to Administration > Employee Setup > Select Employee Mobile Time Setup and select the Mobile Time check box to designate employees for Mobile Time.

How do I install Mobile Time? Launch either the iOS or Google Play app stores and search for "CCH ProSystem" and select "CCH ProSystem *fx* PM Mobile Time" to download and install on your device.

How do I log in to Mobile Time? Tap the Mobile Time icon on your mobile device. Enter your CCH account number as well as your Practice Management Employee Code and Password. Passwords are the passwords set up in Practice Management (which would now be required). If your device supports it, you may choose to use your thumbprint to log in as well.

How do I access the main menu in Mobile Time? Tap the "hamburger menu" in the upper left-hand portion of the screen to access the main menu. The four main menu items are:

1. Time & Expense Entry
2. Release Entries
3. Posted Hours
4. Contacts

Hamburger Menu

Time & Expense Entry provides a week summary and add/edit time and expenses.

Release Entries enables the user to release saved transactions.

Posted Hours gives a view all posted hours for any week no matter where entered and for any month or year.

Contacts provides a view of Client and Client Contact phone numbers, email addresses and a physical address for the Client.

About to see the Mobile Time version installed on your device.

Log Out to end your Mobile Time session.