ProSystem *fx*® Practice (SaaS)

ProSystem *fx* Practice (SaaS) Release Bulletin

This bulletin provides important information about the 2009-5.0 release of the ProSystem *fx* Practice (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* Practice

Billing and Invoicing

♦ Smart posting of invoices is now available. You can now final print and post all invoices that are eligible for posting from one processing option, without selecting the additional step of final printing first.

♦ Practice now matches Foundation ProSystem *fx* Practice Management with the ability to enter nonbillable work for a billable client as needed. Permissions must be set prior to the entry of a nonbillable service code in Time Capture to a billable client.

♦ Practice has 3 billable option categories: (1) Billable, (2) Nonbillable, and (3) Nonbillable to Billable Client. In this release, the third option (matching Foundation Practice Advantage functionality) has been renamed from "Nonbillable to Billable Client" to "Use the Client's Billable Setting" for clarification.

Reports

♦ This release introduces 7 new Practice reports:
  - Client Production
  - Client Profit
  - Three Year Realization
  - WIP/AR Summary
  - Banked Hours
  - Staff CPE
  - Staff Nonbillable

In addition, improvements were made to the 39 production reports including additional grouping options for Client Responsible Staff to the following reports:

- ♦ WIP/AR Aging
- ♦ AR Aging
- ♦ AR Reconciliation
- ♦ AR Payments and Credits