

ProSystem fx[®] Practice (SaaS)

Release 2010-3.5

April 2011

ProSystem fx Practice (SaaS) Release Bulletin

This bulletin provides important information about the 2010-3.5 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

CPE Reminder Notifications

Notifications may now be set up to inform staff of CPE requirements and hours completed to date. Based upon CPE jurisdiction, the renewal period is set to annual, biennial, or triennial. For each staff you have set up, the CPE reminder notification will be generated according to the renewal period.

Finance Charges

On the Calculate Finance Charges screen, you will now be able to see the total outstanding balance and total finance charge for only those items selected, in addition to the total outstanding balance and total finance charges for all items.

Client Inquiry

The Work in Progress page has been updated to allow you:

- ◆ To view the total current WIP balance for a client.
- ◆ To include as an available column selection a column to show whether the WIP detail is billable or nonbillable, allowing you to quickly answer billing questions.
- ◆ To include totals for the detail WIP displayed for the date range selected. A cost total will only be displayed if you have been granted permission to view transaction costs.
- ◆ The Invoices page has been updated to allow you to view an invoice by selecting **View Invoice**. The invoice displayed is non-editable and can be printed. If multiple invoices are selected for viewing, arrow buttons are used to move between the selected images.

Reports

This release introduces 19 new Practice reports: AR Detail Aging, Billed Fee Analysis, Billing Report, Client Ledger, Client Notes, Collection Letters, Deposit Report, Invoice Realization with Reason Codes, Managed Revenue, Print Labels, PTD/RTD Staff Bill-Nonbill, PTD Staff Billing, PTD Staff Service, Staff Production, Staff Realization by Allocation, WIP Activity Net of Retainers, WIP/AR Reconciliation by PTD/RTD, WIP Assigned to a Project, and WIP Detail Ledger.

Data Migration

Eight key enhancements have been made to the data migration utility:

- ◆ The Migration Exception Report will now list only those records containing an exception.
- ◆ The migration user interface will now inform you of what phase the migration is in.
- ◆ Default selections in the migration utility now inform you of the most common decisions.
- ◆ If migrating from ProSystem *fx* Practice Management, you will now have the ability to reassign the “Other” reason code to any of the five reason code types available in Practice (SaaS).
- ◆ If suspected duplicate client records are found during migration, you are now able to indicate which client to link with an existing Practice (SaaS) client and which client(s) to add as new.
- ◆ If migrating from ProSystem *fx* Practice, invoice images created using Crystal reports format will now be migrated in PDF format.
- ◆ If migrating from ProSystem *fx* Practice Management, you will now be able to migrate existing custom client types for use in ProSystem *fx* Practice (SaaS). If the custom client type does not yet exist in ProSystem *fx* Practice (SaaS), you will be able to select from a list of existing custom client types or create a new one.
- ◆ Voided AR entries will now be migrated from ProSystem *fx* Practice Management, providing an audit trail via the Accounts Receivable Void and Correction report.