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ProSystem *fx*® Practice (SaaS)

Release 2010-4.0

June 2011

ProSystem *fx* Practice (SaaS) Release Bulletin

This bulletin provides important information about the 2010-4.0 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

Automatic Billing

Automatic Billing allows you to create templates for billing fee agreements, define a schedule for invoice generation, and produce an invoice on the scheduled date. Two invoice generation options are available for billing fee agreements – automatic or manual. For automatic billing, the system monitors the billing fee agreement schedule, automatically generates the invoice, and sends a notification indicating that either the invoice was generated and is ready for review or that the invoice was not generated and provides an explanation. The manual option generates invoices according to the terms of your billing agreement as part of your normal billing process.

Finance Charges

The buttons on the AR Finance Charge screen have been moved to better reflect the process order. The first step is to select the clients for which to calculate finance charges. Upon pressing the Calculate button, finance charges are calculated and displayed. The Clear button clears all selections and finance charge calculations if desired.

Productivity Goals

Rules have been enabled which now allow productivity goals to be set for current or future years only.

Billing and Invoicing

Invoice workflow has been streamlined by changing the default print option to Print Final.
Billing a large number of clients has been made more efficient by specifying Client ID as the default sort order for the Client Summary view.
Building service code paragraphs has been simplified by improving the process of adding and inserting keywords.

Reports

A Contact List report which will display a list of contacts along with necessary address and phone information is now available. This report provides a list of all client contacts in one convenient report.