

ProSystem fx[®] Practice (SaaS)

Release 2010-4.2

August 2011

ProSystem fx Practice (SaaS) Release Bulletin

This bulletin provides important information about the 2010-4.2 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

Improved Client, Client Billing Group, and Invoice views have been added in order to streamline the billing process and provide enhanced functionality. Features of the new billing view system include:

- ◆ A filter pane has been added which facilitates quickly displaying the exact transactions you desire to bill.
- ◆ A column pane allows the quick selection of columns to be displayed in a view.
- ◆ Custom views created using the filter and column panes may be saved, allowing you to create a custom view once and access it instantly as needed.
- ◆ Multiple views may be open at the same time and accessed quickly via tabs located at the top of the window.
- ◆ Detach a view and freely reposition it, either on the same or a different monitor.
- ◆ Pin and unpin panes functionality provides the ability to show a pane all of the time or only when you hover over it.
- ◆ Sort across multiple pages functionality is available when filter results span more than one page.
- ◆ Organize views in a way that helps you work most efficiently by creating folders and subfolders and storing views within them.

Billing by Project view, available in prior versions, will be provided in a later release. Billing by project may still be accomplished by opening the Projects tab in WIP detail, where all WIP is summarized by project by default.

“Bill through date” text on the Home tab ribbon of the Billing and Invoicing views has been changed to “Override bill through date” to better reflect the functionality of the feature.

Accounts Receivable

Accounts Receivable functionality has been simplified and streamlined with this release:

- ◆ Flexible filter options on the transaction entry window replace the navigation pane, allowing you to quickly create a list of desired transactions.
- ◆ Undistribute now provides an option to reverse a prior distribution.
- ◆ Distribute/Redistribute allows you to edit a prior distribution.
- ◆ Manual Distribution has been enhanced to show each charge item in a separate tabbed window.
- ◆ Auto-distribution configuration improvements clarify how payments will be auto-distributed.

Reports

Two reports have been added to allow for improved tracking of staff time and productivity:

- ◆ Staff Posted Summary report allows you to compare billable and non-billable hours for each employee.
- ◆ Staff Monthly Comparison report provides employee production and billing information for a 12 month period.

Performance improvements have been implemented for complex reports, resulting in faster display times.

The WIP Corrections and Deletions report now contains the accounting period date, allowing you to balance transactions which have been corrected, transferred or deleted across different accounting periods.

The Finance Charge Register now displays the transaction reference number and finance charge date which allows finance charges to be tracked across accounting periods.

Data Migration

Additional options regarding what data will be migrated from ProSystem *fx* Practice or ProSystem *fx* Practice Management are now available with the Data Migration Utility. Firms may now select to migrate:

- ◆ Common data only (client and staff).
- ◆ Common data plus practice data, either with or without projects.
- ◆ Common data plus project data, allowing firms not yet licensed for Practice (SaaS) to immediately begin using ProSystem *fx* Workstream.