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ProSystem *fx*® Practice (SaaS)

Release 2011-1.0

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ProSystem *fx* Practice (SaaS) Release Bulletin

This bulletin provides important information about the 2011-1.0 release of ProSystem *fx* Practice (SaaS). Please review this bulletin carefully prior to installation. If you have any questions, please call Account Services 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 (SaaS)

Time Capture

Time Capture usability has been improved with the following:

- **Checkboxes were removed** from the Daily Entry screen, allowing you to instead use the Ctrl and Shift keys to select the records you would like to perform an action on.
- **Editing transactions** have been streamlined when the Auto-Fill option has been enabled.
- **Quick Filter date settings** will now remember the last used date when you exit a view.

Billing

Enhancements which have been made to Billing with this release include:

- **Column width and column position adjustments** will be remembered by the system when you exit billing and will display as previously set the next time you access the billing module.
- A **Bill by Project view** has been added which allows you to display and bill unbilled WIP by project.

- A **Client Responsible Staff column** may now be added in the Project, Invoices, and Client Billing Group views. You may additionally select responsible position and assigned staff as view filter criteria.
- A **sortable Client Custom Field column** may now be added to the billing views to provide you with additional information needed to make billing decisions. You may also select Client Custom Fields as view filter criteria in the Client Summary, Invoices, and Client Billing Group views.
- The **Finance Charge Register** may now be printed from the Finance Charge window prior to saving and posting. This will allow you to verify finance charges prior to finalizing.
- **Sorting a column in a Billing view** will now sort the results across all pages in that view, not just the current page.
- **Client and Client ID columns** have been added to the Client Billing Group view, allowing you to see which client a given WIP record belongs to.
- **Bill Through Date** may now be set as a firm option to either a firm-selected date or alternately default to the current system date.

<u>Invoice and Statement Content Manager</u>

Invoice and statement formatting has been significantly enhanced with the following:

- **Preview functionality** has been added to the Template Wizard, allowing you to see the results of your selections while still within the wizard.
- **Widow and Orphan Controls** have been added to assure that the entire contents of a section will remain on the same page when printed.
- **Additional Header and Date Keywords** have been added to provide more flexibility when producing invoices. Twenty-one additional header keywords and seven additional date keywords have been added.
- An **Accounts Receivable Statement Area** has been added to the invoice template which will allow you to customize statements sent clients who are not receiving a new invoice for the current period. You will be able to select between displaying the balance forward and a list of open invoices.
- The **Free Form Template** may now be customized through the Template Wizard. You may create multiple Free Form Templates or utilize the Save As function to create a new Free Form Template from an existing template.
- **State Abbreviations** are now used in client addresses to facilitate the use of window envelopes.

<u>Accounts Receivable</u>

Accounts Receivable usability has been improved with the following:

- **+ signs** will no longer be displayed for transactions in the Accounts Receivable Transactions view which have no distribution.
- **Date field values** within the Accounts Receivable Entry screen will be retained for the next transaction. At the end of the current session, the default date will be reset to the current system date.
- An **Unpaid Amount column** has been added to the Accounts Receivable Balance screen.

Lookups

Improved lookups have been added throughout the application as follows:

- Client lookups
  - You may select to have the type-ahead function search by any combination of Client ID, Client Name, or Office.
  - Clients may now be added on-the-fly from the client lookup menu.
  - In order to increase responsiveness, the lookup drop-down is now pre-populated with 50 clients. By default, the first 50 choices populated are active clients assigned to the same office as you. Alternately, you can use a filter to determine the default data. This filter can utilize any combination of Client ID, Client Sub ID, Office, Business unit, Client Type, Client Class, Unbilled Amount, Billing Fee Agreement, Client Responsible Staff, or Client Custom Field. These client lookup filters are specific to you and are not shared across your firm.
- Staff lookups
  - You may select to have the type-ahead function search by Staff ID, Staff Name, or both.
  - In order to increase responsiveness, the lookup drop-down is now pre-populated with 50 staff. By default, the first 50 choices populated are active staff assigned to the same office as you. Alternately, you can use a filter to determine the default data. This filter can utilize any combination of Staff Status, Staff Home Office, Staff Department, and Staff Position. These staff lookup filters are specific to you and are not shared across your firm.
- Project lookups
  - A filter is now available which excludes all projects whose status equals Completed.
  - You will now be presented with only those projects available for the selected client.
- Workstep lookups
  - You will now be presented with only those worksteps available for the selected project.
- Service Code lookups
  - You may select to have the type-ahead function search by any combination of Service Code ID, Service Code Name, Service Code Category, or Service Code Subcategory.

Other Enhancements and Technical Corrections

Other enhancements and technical corrections made with this release include:

- **Transfer WIP functionality** has been enhanced to assure all values are appropriately transferred as part of the process.
- **Clients with deleted WIP** may now be deleted from the system if desired.
- **Clients, Staff, and Service Codes with non-billable WIP** may now be deleted from the system if desired.
- **Work Locations, Finance Charge Rates & Properties, CPE Types, CPE Categories, and Bank Account** list items may now be deleted from the system if desired.
- **Alternate row shading** has been removed from the Detail WIP, Rebill Invoice, and Accounts Receivable screens to make it easier for you to distinguish which records have been selected.

Reports

Report enhancements provided with this release include:

- An **Include or Exclude Deleted Staff** option has been added to sixteen staff-focused reports.
- The **Accounts Receivable Aging Report** may now have distributed payments aged according to two different methods. One method uses the invoice date as the date aging begins while the other method uses the date the accounts receivable was distributed.
- The **Billing Register** now has the ability to display reversed invoices, non-reversed invoices, or both.
- The **Billing Register** now has the option to display the WIP detail used to create an invoice.
- The **Staff Time Analysis Report** has been enhanced by expanding data selection, sorting, and grouping options.
- **Group by Service Code** is now available as an option for the Time and Expense, Client Ledger, and WIP Detail Ledger reports.
- **Filter by Service Code** is now available as an option for the Time and Expense, Client Ledger, WIP Detail Ledger, and Client Billing Realization reports.
- The **Billing Realization Report** may now be sorted and grouped by Category, Subcategory, and Service Code Name.
- The **Project Summary Report** will now display all projects which either have the specified statutory due date or the due date is blank. This allows projects without a statutory due date to be displayed.
- **Background report shading** has been removed when printing in black and white, making printed reports easier to read and using less print toner/ink.

Data Migration

Data migration functionality has been improved as follows:

- **Deleted clients** may now be excluded from migration if desired.
- **Duplicate Staff Employee Numbers** within the source database will now be identified by the Data Migration Utility and the process suspended until the issue is resolved. If the employee number already exists in the Suite common data, you will be given the option to link the associated records to one staff member or create a new staff member with a different employee number.
- **Default and previously migrated list Items** are now clearly differentiated from those currently being migrated.