

ProSystem fx® Practice (SaaS)

Release 2011-3.5

May 2012

ProSystem fx Practice (SaaS) Release Bulletin

This bulletin provides important information about the 2011-3.5 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)

Track Time

Time and expense entry enhancements include:

- ◆ **New user option** to use the ENTER key to move between fields when entering time and expense transactions in Daily Entry resulting in a faster data entry experience.
- ◆ **Improved visibility of internal notes and invoice descriptions** in time capture views so you can easily review transactions in the time capture summary grid.
- ◆ **Automatically start a clock when you open a ProSystem fx Tax (SaaS) tax return** and be prompted to stop the clock when you exit the return, embedding the time tracking process more naturally into your workflow.
- ◆ **Continued enhancements around entering and reviewing time and expense transactions** to save time and gain efficiencies.

Billing and A/R

Added Billing and A/R functionality includes:

- ◆ **Invoice template functionality** has been improved, allowing you the ability to use both detail and summary items on the same invoice, choose whether to include time, expenses, or both in a section, add standard paragraphs and free form sections to templates, and better control alignment of WIP detail.
- ◆ **Create multiple headers and footers** and set header and footer options in templates or for each individual invoice allowing firms to create more customer and office specific headers and footers.
- ◆ **Improved sorting of Billing and A/R views** across multiple pages.

Reports

Current Report enhancements include:

- ◆ The **option for deleting report filters** has been made more intuitive.
- ◆ The **following reports have been enhanced** to make them more user-friendly: Staff Time Analysis, Billing Worksheet by Service Code, Client List Report, A/R Balance Listing Report, Client Billing Realization, A/R Aging, A/R Detail Aging.
- ◆ A **new security right** has been added which allows you to control the ability to view rate or cost information on reports.

New Reports when using ProSystem *fx* Workstream:

- ◆ **Intracompany Cost and Profit Report** allows you to track cost and profitability by office or project.
- ◆ **Billing Worksheet by Project Report** allows you to review the WIP associated with specific projects.

Other

Other features added include:

- ◆ **Five firm level reports** are now available to all firms licensed for any ProSystem *fx* SaaS product.
- ◆ A **busy indicator has been added** to selected screens, informing you when the system is processing.
- ◆ **ProSystem *fx* Workstream project status may now be viewed and updated** from the Time Capture and Clock screens.
- ◆ **Marking a ProSystem *fx* Workstream workstep Complete** via the Time Capture and Clock screens has been made more user-friendly.
- ◆ The **Client Import Utility** now provides the ability to import additional Practice-specific fields.
- ◆ **Firms migrating from ProSystem *fx* Practice Management** to ProSystem *fx* Practice (SaaS) may now select the number of years of history to migrate.

Technical Corrections

Technical corrections provided with this release include:

Time and Expense Entry

- ◆ Changes to Edit Staff and Edit Date fields for saving time and expense transactions.
- ◆ Corrections to clock behavior when starting and stopping clocks.

Billing and A/R

- ◆ Update Bill Through Date feature now displays WIP accurately.
- ◆ Billing rates are now displayed correctly on detailed invoices.
- ◆ Corrections to A/R Statement Balances, Statement generation, and statement delivery.
- ◆ Speed and stability in Billing Views has been improved.
- ◆ Data is now maintained when reversing invoices.
- ◆ The Correct and Recalculate WIP processes have been updated.

Reports

- ◆ The correct time zone is now displayed in report footers.