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ProSystem *fx*® Practice (SaaS)

Release 2011-4.11

August 2012

ProSystem *fx* Practice (SaaS) Release Bulletin

This bulletin provides important information about the 2011-4.11 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 and Expense Entry

- **Time Keeper Security and Workstream Field Permissions** – In order to improve user experience, we've made improvements to the functionality of the Time Keeper Security group and its effect on ProSystem *fx* Workstream fields in Time Capture. Please be aware that Time Capture and Workstream are now honoring all Workstream permissions with regards to the Workstream fields for Project Status, Mark workstep complete, Estimated Hours to Complete, and As of Date. These changes ensure that Staff Assigned to worksteps can make appropriate changes to the workstep, while others with specific additional permissions can still make changes to the workstep if necessary.

  Going forward, Workstream and Time Capture recognize that "Updating Status" does constitute editing the project, and "Mark Workstep Complete", "Enter Estimated Hours to Complete" constitute editing a workstep. As such, you need "Project – Edit" permissions to "Update Status" or "Workstep – Edit" to edit unassigned worksteps or worksteps assigned to others. If you do not need to update project status, mark worksteps complete, or enter estimated hours to complete, you do not need "Project – Edit" or "Workstep – Edit" permissions and will be able to enter their time to projects and worksteps. To ensure appropriate staff can edit these fields through Time Capture, please do a thorough review of your Security Permissions after this update. Pay particular attention to “Project - Edit”, “Workstep - Edit”, and “Manage Own Worksteps”. If you have any questions, please call our Technical Support staff.

- **Internal Note and Invoice Description Fields** – We improved the functionality of the pop up text box that appears when you enter a note for a time transaction. Enter and Tab saves your text, collapses the text box and moves your cursor to the next entry field. Since these are the keystrokes more commonly associated with data entry fields, this saves existing staff time and reduces the learning curve in Time Capture for new staff.

<u>Billing and A/R</u>

- **A/R Distribution in Billing Groups** – You can now distribute any type of A/R transaction across all clients in a billing group. You can now enter a single payment transaction for multiple invoices across the billing group. Also, you can apply any other type of A/R transaction across multiple clients in the group, for example, apply a single credit amount across multiple invoices across the group.
- **Smart Client Billing Groups** – When setting up new clients that have the same Client ID as an existing client, you will be prompted/asked if you want to add the Client to a Billing Group. If yes, and a billing group does not exist for the Client Code, the Client Group area in Configuration opens automatically. This helps save time and improves data integrity in the event a user forgets to create a billing group and add the client, the program can now sense, based on certain workflows, that a billing group may be necessary. Changes in the order of fields on the Client Setup screen also help make the process of assigning billing groups more intuitive.
- **Invoice Amounts** – All invoice amounts now include commas as appropriate. You no longer need to manually edit invoices to add commas which results in significant time savings.
- **Zero Amounts on Invoices** – Practice now suppresses $0 line items for progress bill, progress applied and sales tax. You no longer have to manually edit invoices to remove these line items which results in significant time savings. Zero no longer shows in the hours column for an expense transaction displayed on an invoice.
- **Invoice Detail Body Sections** – Detail body sections on invoices now include totals. Having totals automatically computed reduces human error in calculating totals as well, reducing the risk of incorrect totals in a particular section. You no longer have to manually edit invoices to add these totals which results in significant time savings.

<u>Reports</u>

- **Financial Reporting Group and Billing Group Options** – Financial Reporting and billing groups now appear as filter and group options on Client based reports. This allows you to run reports which group clients together by financial reporting group or billing group, depending upon your specific needs. This reduces the need and time involved in exporting certain reports for further manipulation.

- **Staff List Report Security and Updates** – The Staff list report now contains less empty space resulting in an easier to read report. This reduces the overall page count when you print the report which means the report generates and/or prints faster, saving you time when processing the report. The Staff List report also ties into a new security permission which allows you to ensure that only necessary users see Salary/Cost information on the report.

- **Report Manager Organization** – The Report Manager navigation pane now shows reports in alphabetical order by group. This frequently requested change provides a more logical listing of reports and saves you time when searching for a particular report.

- **Report Help** – A new hyperlink on the Report Options screen takes you directly to the Support Help topic for the report. This provides another quick and easy path to the specific help, saving you time when you have questions about a specific report.

Administration

- **Update Multiple** – Additional fields of Client information are now available in Client Manager – Update Multiple. This feature allows you to quickly and easily locate a specific piece of information for a group of clients and update that information. This reduces the need to open and close each individual client to make changes, saving significant time when updating large volumes of client information.

- **Firm Lists** – **Delete Items** – You can now delete items from your *Invoice Status* and *Billing Fee Agreement* lists. This saves you time as these unnecessary items no longer appear in lists.

Integration

- **Dashboard** – **Notifications** – Notifications on the Dashboard now include additional identifying information. To make it easier to sort and organize your notifications, we've added Client Name, Client ID, Staff Name, and Staff ID as available fields on the Notifications Pane. Once you select these columns, your column settings persist. As you no longer have to open the notifications to see Client and Staff information, this allows you to gain efficiency and have better information and clarity into these notifications.

Feedback Feature

- **ProSystem fx Help** - Files now offer a new feedback feature. You can send suggestions for supplementing or improving the help files directly to CCH, without ever leaving the help file. To open the feedback window, click the star button. This button is located at the bottom of each help screen, as shown below:

- To see a demonstration of the Help feedback feature, visit https://www.brainshark.com/cch/vu?pi=zHtzsdxHbz1So4z0&intk=854606739

Technical Corrections

Technical corrections made with this release include:

Time and Expense Entry

- Improvements to lookup functionality in drop-down lists
- Removed internal projects from the Project list which previously displayed when Tax (SaaS) was licensed without Workstream
- Transaction Summary Pane now updates more quickly to show the latest transactions
- Transaction now round correctly based on Firm and User Option settings

Billing and A/R

- Improved alignment when you add paragraphs to a free form invoice or when showing time capture descriptions on an invoice
- Cursor now remains in the correct place after adding paragraphs to the invoice
- Improved "click and drag" functionality when selecting multiple invoices in a view

- Improvements to header and footer edits including changing header/footer name, and appearance of phone numbers
- Progress Billings now apply correctly across the group, regardless of order of principal client
- Removed commas from items displaying in Rate column on invoices
- Search by Client Name/Client Code setting now persists in drop down lists
- When associating service codes with a Billing Fee Agreement, the service codes now appear in alphabetical order
- Expenses now transfer correctly when using Transfer Lump Sum WIP feature
- Removed negative number sign displaying incorrectly on some statements
- Statements for clients with $0 balance now print with the correct settings
- Corrections to items displaying on Open Item and Remaining Amount statement types
- Corrections to Billing Notifications when using Client Responsible Staff to select recipient

Reports

- Labels now print addresses even If you did not specify primary or mailing address in the client profile
- Can now Print Preview multiple reports at the same time, including custom reports

Other

- New Staff Emails are generating correctly
- Client Import Utility now includes Title and Suffix for Individual Clients and includes Correspondence Name for all clients