ProSystem *fx*® Practice (SaaS)

Release 2012-1.0

December 2012

ProSystem *fx* Practice (SaaS) Release Bulletin

This bulletin provides important information about the 2012-1.0 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. You may visit at any time, including when support is closed.

NEW IN THIS RELEASE

ProSystem *fx* Practice (SaaS)

Integration

- **Client Dashboard –**You can quickly and conveniently access client information on the new Client Dashboard. The Client Dashboard includes contact information (addresses, phone numbers), WIP, accounts receivable, and project information. Quicker, easier, more convenient access to this information saves everyone time when they need to look up information about a client.

  You can now view this information without needing access to Client Manager and the full client setup screen. Launch the Client Dashboard directly from your current dashboard, any Practice ribbon, or you can add the Client Dashboard button to your Quick Access Toolbar.

- **Billing Access in ProSystem *fx* Tax (SaaS)** – You can now add a shortcut to your Quick Access Toolbar in ProSystem *fx* Tax (SaaS) that provides direct access to the Client Summary view in Practice (SaaS) Billing.

  This saves time for you when you want to create an invoice in Practice, but you have Tax open, and not the Billing module. This short cut allows you to open Billing without browsing back to your Dashboard.

- **Publish Invoices to ProSystem *fx* Portal** – If you create an invoice in ProSystem *fx* Practice (SaaS) and you license ProSystem *fx* Portal, you can publish the invoice to Portal when you final print the invoice. This direct integration with Portal saves you time, as you do not need to open your Portal Administrator account to add files to a client's portal. This facilitates faster delivery of invoices to clients, and capitalizes on the email notification features available in Portal to remind the customer to check their Portal for new files.

- **Publish Invoices to ProSystem *fx* Document (SaaS) -** If you create an invoice in ProSystem *fx* Practice (SaaS) and you license ProSystem *fx* Document (SaaS), you can save the invoice to Document when you final print the invoice. This direct integration with Document saves you time, as you do not need to open Document to add files. As you add the file to Document you can also choose to publish the invoice to the integrated Portal. This facilitates faster delivery of invoices to clients, and capitalizes on the email notification features available in Portal to remind the customer to check their Portal for new files.

  New firm settings allow you to set specific Document meta data (class, subclass, and default storage folder), choose whether you want to use these default settings, and whether to show or hide *the* Document Add Files screen when saving a file to Document. Additional settings allow you to choose if you want to publish the invoice to the integrated Portal, specify if you want to allow the file to be editable on the Portal, and choose an invoice default file naming convention.

Billing and A/R

- **Print Multiple Copies of Invoices and Statements** – When you final print invoices and statements, you now have the option to print multiple copies, no longer requiring you to repeat the final print process to get an additional copy.

- **Invoice View Filtering and Columns** – Posted invoices in a view now display Posted in the Status column, which provides more clarity about invoice status. You can also filter the view by status, saving you time if you are looking for only posted invoices or invoices with a particular status during processing, for example, invoices ready for review. You can apply a filter based on any status in your Invoice status list, which you can configure in Practice Lists in Configuration.

  Also, you can now filter your invoice views based on a particular date range. This saves time and clicks if you need to find an invoice posted on a particular date. The date range defaults to the current month, based on your current system date.

- **System Performance** – You will see continued improvement to the performance and speed of Billing, particularly when creating and editing invoices.

Reports

- **Client Billing Realization Report** – There have been enhancements and improvements to improve the usability and efficiency, allowing you to run the report faster and get the data you need in a timelier manner.
- **Performance** –Load time for reports with large amounts of data has improved, allowing you to run the reports faster and to help with faster decision making.
- **Billing Worksheet –** The Billing Worksheet reports have been improved for increased efficiency.

Administration

- **Update Multiple** – You can now update Billing Fee Agreement information via the Update Multiple feature in Client Manager. If you have several clients using the same billing fee agreement, this will save you many clicks, as you can now update the fee agreements in a batch, rather than opening each client profile individually.

- **Delete from Practice Lists** – You can now delete items from your Roles and Bill Rates lists, ensuring that invalid items do not exist, and you will not use these items.
- **Accounting Period Date Setting** – You now have additional clarifying bubble Help information that explains the date setting and purpose directly on the Firm Settings > Practice screen.
- **Staff Bill Rates** – The Staff Bill rates screen was redesigned to provide you an easier, more intuitive way to enter and edit bill rates and to set effective dates. This redesign saves you time when you need to setup new Staff, or update rates for existing staff.

Technical Corrections

Technical corrections made with this release include:

Time and Expense Entry

- Improvements in error messaging and ratio computations on the MTD hours screen.
- If you are licensed for ProSystem *fx* Workstream, there are improvements in error messaging when you enter time, and you are not assigned to the workstep.
- Quick Filters in the Ready to Post view now display the appropriate information in a timely fashion.
- Reimbursable expenses now display in Daily Entry, based on dollars or units as appropriate.
- Improvements to client and staff lookups and filters for Clocks

Billing and A/R

- Continued improvement to formatting and alignment on invoices and statements, including client name, firm phone, email, website keywords, logos, accounts receivable aging information, and email attachments for statements.
  Note: If you have questions about specific issues, please contact our Account Services team at 1-877-977-9PFX (9739).
- You can now set your lookup preferences for filtering clients in Billing, and the setting persists.
- When reversing progress bills, the Client Summary view refreshes to include this change.
- Only appropriate clients show in the available list when printing statements.
- Unnecessary characters were removed from the Hours column on the WIP detail screens.
- Billed amounts display beside each WIP transaction on the Client Detail Review > WIP Detail screen once a billing decision is made.