

# CCH® ProSystem fx® Practice Management

## Welcome to CCH® ProSystem fx® Practice Management 2020.20.03

This bulletin provides important information about the 2020.20.03 release of Practice Management. Please review this information carefully. If you have any questions additional information is available on [CCH Support Online](#).

## New in the November 2020 Release

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### SEARCH BOX FOR REPORT WRITER REPORTS

There is a new field above the report list.

- Enter any part of a report name and the program will find report names that match your entry.
- The search will display a list below the search box of the matches.
- Select to edit or print any of the displayed reports and the report will open while highlighting the appropriate report folder.

### CUSTOM LABELS

Custom labels have been reorganized on the Administrative Activities and Firm Setup form (also found under the Firm Menu).

- The label heading is "Custom Firm Labels"
- These labels now include
  - Client Staff Positions
  - Project Status Dates
  - Phone Labels
  - Time Off Labels.
- The Time Off Labels provide the firm the ability to change employee yearly allowance labels.
  - The standard labels are: Sick Leave, Vacation Time and Personal Time.
  - These labels must be unique.
- If you want to use PTO only, PTO would replace Personal Time.
  - We suggest for the sick label "Sick Inactive"
  - We suggest for the vacation label "Vac Inactive"

### UPDATED CORRECT DATE IN TIME ENTRY

Correct Date on the Time and Expense Entry tab has been updated.

- All entries display the indicator "U" to indicate they are available to change the date.
- When Correct Date is accessed from Edit Released Time, all entries that display the indicator "R" to indicate they have been released but not posted are available to change the date
- To change the date:
  - Select the new date.
  - Select the entries for the date correction.
  - Click the Transfer Entries button.

- Use the Close button to exit the form.

## ENHANCED GRID FILTERS

Right click on a grid column row for a popup form for filtering

- There is a new entry field for the input you want as your filter value.
- Filter works on any data type including dates, dollar amounts, numbers or text (such as name).
- Now instead of scrolling and sorting to find a value in the column you may enter any value for your filter.
- Once you enter the value you may then indicate the filter action "=", "<>", ">", "<".
- For example, you may right click in an invoice amount column, input a value of 500.00 and select the ">" operator to give you all invoices over that 500.00.
- To filter for a negative dollar amount, i.e. (\$500.00), input -500.00 for the filter value

## FIRM DASHBOARD

Firm Summaries / My Summaries

- Additional row for Invoice amounts that include progress
- Additional row for realization including progress amounts

## CLIENT DASHBOARD

WIP Tab

- Additional column for Post date

## CONTACT MANAGEMENT LOOKUP

Contact Management individual clients

- Now includes a lookup for the invoice number on the Invoices tab.

## NEW CLIENT REPORT

Client list of postings by date

- On the Administration Activities and Firm Setup form, Client Posted Report is under Time Update.
- Client Posted Report is also found under the Activities menu in Administration.
- Report criteria includes the client range and the date range.
- Columns include Client Name(Code), Post Date, WIP Date, Employee Name (Num), Service, Service Description and Hours

## CONTACT MANAGEMENT LINKS

Contact Management quick links now include:

- Marketing Reports
  - Marketing Activity Log
  - Marketing Report
  - Marketing Tickler Report
- Marketing / Mailers
- Client - Prospect List / Client Listing Report

## INVOICING

Key words for the invoice paragraphs now include all client manager positions.

## LOOK AND FEEL

Folder tabs have been updated for a more standard look.

Lookup for grids

- The entry box is shortened.
- There is the search icon at the end of the entry box.

In Security Setup the detail privileges have been alphabetized under each node.

## IMPORT CLIENT INFORMATION

Clients\_In Program (external to the Practice Management program)

- For firms programming a transfer of client data from a third party to the Practice Management Clients\_In table, there have been a few more fields available in the program.
  - Client web address - input the client's web address
  - Billable - input a "1" for billable or a "0" for non-billable
  - Print AR Statements - input a "1" for billable or a "0" for no
  - Calculate surcharges - input a "1" for billable or a "0" for no
  - Default invoice format - input the name of the desired invoice format
  - Override default header-footer - input the name of custom header-footer to be used for this client if this client needs to have a different header-footer than the firm's or office's default.
  - Finance charge - input the name of the finance charge to be used or leave the default of NULL to be processed as 'No Selection'
  - Sort Code – input a number between 1 and 99

## Issue Resolutions

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The following section contains information about resolutions to known issues.

### Administration:

The Printer Format Selection window no longer hides behind another window selecting the Print Transfer button to print the Transfer – Progress register prior to posting.

### External:

Edits successfully pulled from Clients\_In table where the Cinvfreq (sort code) has a NULL value running ClientsIN.exe

### Project Management:

Deselecting the Include Assigned Employees option when copying projects no longer includes assigned employees.

Editing the assigned service via Project Find and Change Detail – Edit Assigned Service will now properly update the bill rate for detail records budgeted at the category or subcategory level.

Rolling projects with the option to Change Hourly Rate based on the service code and project type enabled now consistently updates the detail records of the newly rolled project.

#### Reports:

Non-budgeted employees are now included when printing the Project Status report for projects that do not have a completed date. Actual hours correctly reported with the Employee Summary or the Employee Detail option enabled for projects with detail records budgeted at the category or subcategory level when Printing the Project Status report.

## CCH® ProSystem fx® Practice Management Mobile Time

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Do you need to be able to enter your time and expenses on your mobile phone? Mobile Time is a program for your phone that allows you to:

- Enter Time and Expenses and view all entries immediately on both your desktop and phone
- Release Entries
- View posted hours for any week no matter where entered
- View client contacts, phone numbers, email addresses and physical location

For more information, go to the following site to contact your sales representative for a demonstration and pricing: <https://engagetax.wolterskluwer.com/l/339101/2020-08-28/21b3dt>

## Getting Started with the November 2020 Release

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#### How does 2-Step Verification apply to Practice Management?

2-Step verification does not affect how you log in to Practice Management.

2-Step verification affects when you log into Software Delivery Manager. The 2-step verification increases security by sending users a code that authenticates identity and the device from which they are logging in adding a layer of protection more resilient than a password alone can provide. We recommend creating separate SSO profiles for any user that uses Software Delivery Manager.

Minimum System Requirements have changed. [Click here for information.](#)

The following section contains helpful hints for success with new features.

- Workstation Setup:  
**If you have not installed 2019.19.01**, you must run workstation setup on ALL workstations.
- Warning if you have custom indexes.  
Before updating, if your firm is currently on a version prior to 2014.14.01 AND has custom or non-standard indexes and/or triggers on client, employee, or project related tables that reference name or address fields, you must remove these

indexes prior to applying this update. We recommend creating a backup copy of the database PRIOR to applying the update. Once the database has been updated, the custom or non-standard indexes can be added back.

## Firm Installation Instructions using the Software Delivery Manager

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You will receive an email notifying you of an updated release. Prior to beginning installation, shut down all modules of Practice Management, including the Tray (PMTray.exe).

### Getting prepared for the software download

- Remote Workstations.  
You must release all time from remote workstations (connected or not connected to the network) before the firm's server is updated with this new version.
- Backups.  
Always verify that you have a current backup before installing updates.
- Permission Keys.  
You must have your user ID (ProSystem fx account number) and password before you can download the permission key. See the CCH ProSystem fx Practice Management Installation Guide, available from within the installation program, for more information.
- Internet Time Entry.  
If you purchased the Internet Time Entry add-on, this is the last year that it will be supported. Your support of Internet Time Entry ends on your 2020 renewal date.

### Downloading the software

1. Open Software Delivery Manager. If you have not installed Software Delivery Manager, [click here for instructions](#).
2. Select the CCH ProSystem fx Practice Management release you want to install.
3. 2 Step Verification is now required.
4. Click **Start Download**.
5. After the download is complete, click **Open** to open the target folder.
6. Double-click the installation file.
7. You will be asked to either **RUN** or **SAVE** the update. We recommend saving the file to a temporary location rather than running it from the Web site. The temporary location must reside on a workstation that has Practice Management installed. You do not need to run this update from the server.
8. Once saved, double-click the **.exe** file to initiate the update. Choose the extraction location for the temporary setup files.
9. **If you have not installed 2019.19.01**, You must run workstation setup on ALL workstations.
10. Update your CCH ProSystem fx Practice Management database to the new version by running **VersionDB.exe** (housed in the ...\\cpas\vpms\Updates folder in your application directory).
11. When the VersionDB window displays, select to update an existing Practice Management database.
12. Enter your SQL server name and SQL database name and click **Continue**.

**Note:** ALL modules of Practice Management should be shut down, including the Tray (PMTray.exe), prior to the installation of any update, whether or not workstation setup is required to ensure proper patching of the workstation

#### For New Installations

You will receive a welcome email that provides instructions on how to set up your CCH ProSystem *fx* SSO Default Administrator user profile. This setup includes your account number (also known as the Business ID number) and your password. More help can be obtained by calling Customer Support at 1-800-PFX-9998.

Make sure you have your account number and password before starting the installation. You will need this information to activate the permission key for software licensing.

Follow the instructions above to download Practice Management using the Software Delivery Manager.

1. After the download is complete, click **Open** to open the target folder.
2. Double-click the installation file.
3. Select **Installation Guide** and follow the instructions in the New to CCH ProSystem *fx* Practice Management section.