

Release 2020.20.01
May 2020

CCH® ProSystem fx® Practice Management

Welcome to CCH® ProSystem fx® Practice Management 2020.20.01

This bulletin provides important information about the 2020.20.01 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 May 2020 Release

Feature Enhancements

UPDATED LOOK AND FEEL

Users will find the look and feel of the folders and grids have been updated. The folders now have a pale almond back color for a new look. Grid row size has been increased for easier reading and the lookup columns have a white background while the remaining columns have a blue and white alternating background.

BILLING

AUTO APPLY PROGRESS OPTION

Quick Bill Auto Apply is a new option when billing. This option provides a quick way to apply outstanding progress amounts when billing multiple engagements. If the engagements have outstanding progress amounts and the distribution of the progress against the billing needs to be a re-distribution, this can now be done automatically when creating a Quick Bill. Security for Quick Bill Auto Apply (Allow Auto Apply Progress for multi engagements) under Billing and Invoicing within Security Setup defaults to No.

DASHBOARDS

EMPLOYEE DASHBOARD NEW TAB

The employee dashboard now has a tab, Banked/Used Hrs, with the banked and used hours detail by date. Employees can quickly stay up to date. Security for Banked/Used Hrs tab under Employee Dashboard within Security Setup defaults to Yes.

CLIENT DASHBOARD NEW TAB

The accounts receivable information on the client dashboard now displays on its own tab, Accts Rec, for a better view of the data on both the General Information tab as well as the new tab. The Accts Rec tab is now the right most tab following the WIP tab. Security for the Accts Rec tab under Client Dashboard in Security Setup defaults to No.

ACCOUNTS RECEIVABLE STATEMENT FORMATS

The Accounts Receivable statement criteria has a new format option, Remaining Amount, to automatically include only clients that have an outstanding balance as of the cutoff date.

GL ACCOUNTING REPORT PERMISSION

A new option in Security Setup under Administration now provides permission to access the GL Accounting report available in Administration Activities. Default for this new option is Yes.

REPORTING

REPORT WRITER TRACKING PROGRESS AMOUNTS

When creating a client report to analyze progress billings, you may set up a column to view the amount of progress billed and applied by date. Now you can add a column, Progress Balance, to show the balance for each row. Use totals for all 3 columns to see the progress balance as of the end date entered.

INVOICE FIRM LOGO

In the past when a firm got a new server or moved the location of the logo used in Practice Management invoices, a call was placed to support to replace the location of the logo which is held in Practice Management. Now once you change the location of the logo, you can go to Change Invoice Logo Location on the Utilities option from the menu bar in Administration and enter the original location and the new location of the logo. This utility will replace the storage address of the old location with the new location.

AZURE SQL ENGINE

Microsoft Azure SQL Server provides firms a new option for the hosting of their Practice Management database. Practice Management IT Consulting is a requirement for implementation for both new and existing firms. Contact your sales representative for pricing and scheduling.

Expand Practice Management Opportunities

Microsoft Power BI: Business Intelligence Training Services

Do you want to create more custom reports for your firm using MS Power BI?

[Click Here To Learn More About Microsoft Power BI Training options From Wolters Kluwer](#)

CCH® ProSystem fx® Practice Management Mobile Time

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, contact your sales representative for a demonstration and pricing.

Issue Resolutions

The following section contains information about resolutions to known issues.

ACCOUNTS RECEIVABLE

Enabling the 'All Employees' option when printing deposit slips now adheres to the Employee Lookup Security.

ADMINISTRATION AND BILLING

Correcting WIP for a non-billable client no longer requires a project selection when the firm option to require projects for non-billable clients is disabled.

CONTACT MANAGEMENT

The project tab in Contact Management now correctly applies the security for "Project Lists – All Projects (not limited by Employee Logged On/In Charge)"

PROJECT TRACKING

Project custom fields can no longer be edited without the appropriate security within the Detail Tasks node.

REPORTS

All Reports: The vertical scroll bar is now available to select one or more employees on the employee tab within the setup for each report.

Billing Worksheet: An error is no longer generated running with the 'Summarize Progress Detail' option enabled and a firm fiscal year end of 02/29.

Billing Report: Generating the Billing Report for Unposted Billings will no longer produce an error.

High Client Billing Report: When running by Bill Manager now sorts correctly by Bill Manager.

Tax Routing Slip: This report now correctly reports only the employees associated with the projects selected based on the chosen report criteria.

Getting Started with the May 2020 Release

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 2020 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

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 purchase the Internet Time Entry add-on, remember that CCH ProSystem *fx* Practice Management and Internet Time Entry must be in sync. If you install the latest version of CCH ProSystem *fx* Practice Management, you must also install the same version of Internet Time Entry.

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. Click **Start Download**.
4. After the download is complete, click **Open** to open the target folder.

5. Double-click the installation file.
6. 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.
7. Once saved, double-click the **.exe** file to initiate the update. Choose the extraction location for the temporary setup files.
8. **If you have not installed 2019.19.01**, You must run workstation setup on ALL workstations.
9. Update your CCH ProSystem *fx* Practice Management database to the new version by running **VersionDB.exe** (housed in the ...*cpas*\vpm\Updates folder in your application directory).
10. When the VersionDB window displays, select to update an existing Practice Management database.
11. 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.