Wolters Kluwer

CCH® ProSystem *fx*® Practice Management

Welcome to CCH® ProSystem fx® Practice Management 2020.20.02

This bulletin provides important information about the 2020.20.02 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 July 2020 Release

Feature Enhancements

NEW FIRM DASHBOARD TABS

CLT 3 YR PRODUCTION
A new tab provides a client analysis including a list of your clients with the following columns:
Client Sort Name
Client Code
Client Entity Type
Client WIP amounts for 1 to 3 years depending on your preference
The years do not have to be consecutive
Client WIP amount average for the number of years selected
Client WIP hours corresponding to the WIP amounts per year
Client hours average for the number of years selected

CLT 3 YR BILLING
A new tab provides a client analysis including a list of your clients with the following columns:
Client Sort
Client Code
Client Entity Type
Client Billed amounts at standard or adjusted for write up/downs for 1 to 3 years depending on your
preference. The years do not have to be consecutive
Client Billed average amount for the number of years selected
Client Realization corresponding to the Billed amounts per year

FIRM DASHBOARD: MY PROJECT OVERRUNS

The following filters have been added:
Show All Projects
Show All Projects Over Budget Hours
Show All Projects Over Budget Amounts
Show Projects that reached 75% of Budget Hours

Show Projects that reached 75% of Budget Amounts

Show Projects that reached 90% of Budget Hours

Show Projects that reached 90% of Budget Amounts

Note: When a project reaches 75% or 90% of budget, it qualifies to be listed.

Project Time & Exp now includes budget detail information if entered including:

Additional budget information displays if entered:
Role of the employee
Employee Name
Service Category
Service Subcategory
Service Code Description

UPDATE TO THE INVOICE LOGO LOCATION

The following enhancements have been added to this utility:

- There is now a sample path to understand where the logo images are stored: \cpas\vpm\images
- When a new server is installed the letter of the server may change and if your firm uses another directory before the cpas directory, then that would be included in your new path.
- There is now a progress bar as the utility makes the changes from the original location to the new location.
- When the utility has completed the location changes for all of the invoices, there is a message as to the number of invoices updated.

Issue Resolutions

The following section contains information about resolutions to known issues.

BILLING CLIENT LIST

The WIP column has been net of any progress amounts. The column header is now NET WIP.

Getting Started with the July 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 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

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. **2 Step Verification is now required.**
3. Select the CCH ProSystem *fx* Practice Management release you want to install.
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\vpm\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.