

Release 2019.19.03
November 2019

CCH® ProSystem fx® Practice Management

Welcome to CCH® ProSystem fx® Practice Management 2019.19.03

This bulletin provides important information about the 2019.19.03 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 2019 Release

Feature Enhancements

Client Setup

Preferences now include a separate column for just the engagement code portion of the client code, "Client Engagement Number". The new column will display as "CLTENG" when building a list of clients by client in Administration under both Client Setup and in Client Find and Change.

Client Dashboard

We have added a new tab, "WIP", to the client dashboard which displays the current open Work In Progress for the selected client. Column totals exist for hours, amount and expenses. If the user is granted permission for "Client Dashboard – "WIP Rate / Amount" in security setup these amounts will display. The security for the WIP tab and to display the rate/amount default to No.

Employee Dashboard

We have added a new tab to the employee dashboard which displays CPE transactions entered for the employee. Options include a date range to review the employee hours for any period of time. In addition the header includes CPE Renewal Date, CPE Required Hours as well as a CPE note. Security for the tab defaults to Yes.

Columns include: Begin Date, End Date, Category, Type, Hours, Class, Location, Sponsor, Sponsor ID, Cost and Yellow Book.

Issue Resolutions

The following section contains information about resolutions to known issues.

Administration

Users can no longer generate a billable transaction to a non-billable client via Create Expense Transaction for Multiple Clients.

Appointments

- An appointment spanning more than one day now displays for each day of the appointment on the Free/Busy tab.
- Private appointments are no longer visible to employees viewing the appointments of another employee.

Billing

No longer able to overapply progress when making billing decisions within the All Categories node of the navigation bar.

Standard Reports

The following reports no longer include data from deleted engagements when run by Client Master - Code or by Client Master - Sort Name:

- AR Balance Listing
- AR Reconciliation
- Billing Report
- Client Production
- Client Profit
- Monthly Comparison

The Client Ledger report no longer fails to report the entirety of an employee's initials.

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 2019 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

1. You will receive an email notifying you of an updated release.
2. 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.

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.