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Release Notes

Release 2019.19.01
May 2019

# CCH® ProSystem *fx*® Practice Management

## Welcome to CCH® ProSystem fx® Practice Management 2019.19.01

This bulletin provides important information about the 2019.19.01 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 2019 Release

### Feature Enhancements

#### Look and Feel updated

A newer look and feel includes the landing forms for the Administration and Accounts Receivable modules. Buttons and folder tabs have also been updated.

#### Time Entry

- Display transaction status now includes "U" for unreleased, "R" for released, "W" for WIP and "H" for history (invoiced).
- When releasing time entries, you may now release individual transactions. There is a new security permission for this feature. The default is "No". Change the default for the appropriate employees.
- When posting time and expense transactions, a new option provides a view of any transactions not released and older than the date range for posting.
- Timers now display the client code, the engagement description, the project and the service code description. The button label for "Edit" has changed to "Open/Edit".

#### Billing

- Online bill managers may now view project budgets including both hours and amounts when making their WIP billing decisions by clicking the project in the billing navigation bar.

#### Marketing – Mailers

- The mailer form has been redesigned to conform to the setup of other list items. Options for mailing lists, merge and quick labels move the user to pop up forms.
- The Quick Labels option now conforms to standard select lists that display both the available fields and the selected fields in separate list boxes.

#### Projects

- Unposted entries, WIP and invoiced WIP transactions are now included in the search results.
- The Locate File button (formerly "Project File Locator") now has 2 radio buttons to filter the client files.
- There is an option to search for only transactions for the project selected in the grid. Find the employee who last posted a transaction to find the client file.

- There is an option to search for all the selected client transactions within a date range sorted so that you can find the employee who last posted a transaction by engagement.

### Reports

- The WIP AR Aging Report now has an additional checkbox for WIP aging only and removes the extra AR aging rows.
- The Billing Report includes a new checkbox to give users the option of filtering for only clients who are being billed.

### Firm Calendar

- Setup a new firm calendar in Administration > Lists > Other. Enter the date, description and select the box if the date is a holiday.
- Employees will find a new tab on their dashboard to view the firm calendar. There is a new security permission for this feature. The default is “Yes”.

### Miscellaneous

- “Role” is an industry standard label in designating the employee function on projects. We have replaced project positions with project roles.
- Bill rate numbers 1 – 25 provide a custom firm label for each rate number. (i.e. Standard, Premium, etc.)
- The main navigation bar now includes a link to the Practice Management support site to reference the latest released version.
- The custom library is not subscription based any longer and the type of report is now listed.

## Issue Resolutions

The following section contains information about resolutions to known issues.

### Reports

#### Employees \ CPE

Sort criteria that wrap to a consecutive page no longer overwrite that row’s date and category information.

#### Clients \ AR Aging

All column and row headers are now exported into the appropriate cells within an Excel workbook.

#### Clients \ Realization by Reason Code

Subtotal, total and summary lines are exported to Excel in their appropriate cells.

#### Employees \ Budgets

All page breaks are now honored when reporting for a single budgetary period.

#### Employees \ Posted Summary

Report output has been modified to display all columns.

#### Custom Library \ AR Open Item Aging

All column and row headers exported into the appropriate cells within an Excel workbook.

### Report Writer

PTD/RTD Production report now subtotals correctly when the Service Code summary is enabled and the report is sorted by Service Code then Subcategory

### Time Entry \ Print

Time Entry Register now exports to Excel the entirety of the memo into a single cell (that can be expanded to show the entire memo)

Expanded memos now wrap within the appropriate columns

### Project Management \ Create Lists

Edit of a project type now writes the correct description to the database

### Contact Management

Error no longer generated on a server or workstation where Microsoft Office is not installed

### Administration

#### Lists – Marketing

Label keywords will now be translated when separated by a space

#### Lists – Employee

Clicking Notes or Payroll buttons within Employee setup now save all other changes and edits made prior.

### Tray

All timers now properly adhere to the user defined client and service code trims established in Time Entry

### Accounts Receivable

#### Print Edit List

A/R Edit List will consistently calculate subtotals regardless of the options chosen.

#### Print Deposit Slips

Field size for the client code field on the Deposit Slip has been increased to better accommodate larger client identifiers.

#### Correct AR\Correct AR

Error no longer generated in redistributing payments in Correct AR

### CCH Axcess Integration

Practice Management now syncs the first 30 characters of the employee's first name and the first 30 characters of the employee's last name to the Report Name field in CCH Axcess

## Getting Started with the May 2019 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 or any of the other hosted applications listed above.

**Minimum System Requirements have changed.** Click here for information.

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

- Workstation Setup:

  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 a 2017 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. 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.