

CCH[®] ProSystem fx[®] Practice Management

Welcome to CCH[®] ProSystem fx[®] Practice Management 2021.21.01

This bulletin provides important information about the 2021.21.01 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 2021 Release

COPY CONTACTS

Contact setup has been enhanced to allow the user to copy contacts from an existing engagement facilitating easier and quicker contact setup. Select the Contact Lookup button on the contacts tab within the client tracking folder to look up a list of contacts for the chosen client engagement.

SERVICE CODE SETUP

Changing from a nonbillable service to a billable service now prohibited if WIP records already exist.

EXPANDED NUMBER OF MAILERS

The number of mailers a firm may create has been increased to 999 from 99.

REFERRAL SETUP

Referral setup has been enhanced to allow the user to copy an address from an existing engagement allowing easier and quicker referral setup. Click the Firm Lookup button within the referral setup to load a list of referral firms from which to copy.

DASHBOARD – FIRM SUMMARY - AR AGING

The Firm Dashboard now includes an AR Aging tab. Select a row to see that client's aging. The client list can also be filtered by aging bucket (note the security for this feature defaults to NO).

DASHBOARD – FIRM SUMMARY AND MY SUMMARY WORK IN PROGRESS

The Work In Progress pane on the Firm Summary and My Summary tabs has been modified to include a summary row, WIP Balance, totaling both fees and expenses.

INVOICE LOOKUP

The Invoices tab in Contact Management has been updated to sort by invoice number from highest to lowest. Use the Find Invoice Number lookup to easily find an invoice.

CORRECT BANK

Correct Bank has been added to the AR module to allow users to modify the bank choice originally selected when the AR transaction was first input. Corrections are made after posting and can be applied to single or to multiple transactions (note the security for this feature defaults to NO).

TE CUSTOM

TE Custom now has an additional option where it can be configured to force timekeepers to choose a TE Custom value for each transaction if the field is required. The TE Custom settings can be reviewed on the Time Entry tab within Firm Setup.

MARKETING REPORT

Enable the new 'Include Progress Amounts' option to include progress amounts in the invoice column.

Issue Resolutions

The following section contains information about resolutions to known issues.

PROJECT MANAGEMENT

Edit Assigned Position Hours now consistently updates the budgeted hours regardless of how the records were ordered or the budget decisions made during the edit.

Edit Assigned Start/Target Dates no longer allows user to modify the target date to be greater than the current due date.

REPORTS

Invoice Number Status has been modified to prevent an error where the firm's next invoice number is not higher than the highest number in the Archived Invoices table.

Employee Monthly Schedules now correctly groups employees assigned to multiple projects of the same type but having different descriptions.

Client Budget To Actual now presents rows associated with an employee having only a last name correctly.

TIME ENTRY

Prompts for users that may have exceeded their PTO allowances now correctly reference the firm's label choice for PTO.

TRAY

Elapsed time for multiple edited timers now remains with and records for the correct timer.

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, go to the following site to contact your sales representative for a demonstration and pricing:

[Click here for information](#)

Getting Started with the May 2021 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: you must run workstation setup on ALL workstations with this release.
- 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.

Practice Management Integration with CCH Axxess

For firms that have the Practice Management Integration with CCH Axxess, the integration setup to install the synchronization service must be run at the server

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, support for this product has ended and it has been removed from the installation. Your support of Internet Time Entry ended 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. 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.