

CCH® ProSystem *fx*® Practice Management

July 2020

CCH® ProSystem *fx*® Practice Management

The Installation Guide details the installation instructions and setup information for **first-time installations** of CCH ProSystem *fx* Practice Management. Please refer to the Table of Contents to locate the step-by-step installation instructions.

If you have installed CCH ProSystem *fx* Practice Management before, use the installation instructions in the Release Notes.

It is our commitment and goal to continue to improve the overall value of the products and services we provide. If we can be of assistance to you, please let us know. You can reach us at **1-800-268-4522**.

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Minimum Requirements

Please refer to the CCH ProSystem *fx* Practice Management minimum system requirements available here: <https://support.wolterskluwer.ca/en/support/requirements/system/>.

Firm Installation instructions

You will need the executable file that you downloaded from our download services.

Installing CCH ProSystem *fx* Practice Management is a six-step process that should be performed in the following order:

1. **Verify** your CCH ProSystem *fx* Practice Management Account Number and Password.
2. Install
 - Microsoft® SQL Express (optional) on the Server. If you have not previously installed SQL Server®, you can select to install Microsoft® SQL Express
 - CCH ProSystem *fx* Practice Management on the Server.
 - Internet Explorer® You MUST have Internet Explorer® Version 10 or higher loaded on the server prior to installing Microsoft® SQL Express.
3. **Set up** individual workstations.
4. **Create** the database.
5. **Verify** your SQL backup procedures.
6. **Set up** your Practice Management database.

Step 1: Verify your Account Number and Password

Make sure you have your account number and password BEFORE starting the installation.

You can obtain your password by calling Customer Service at **1-800-268-4522**. You can download your permission key from our Download centre. To access the download centre, enter your username and password information in the "Member Identification" section of the "Downloads!" page at: <https://support.wolterskluwer.ca/en/download/>.

You will need this information to activate the permission key for software licensing.

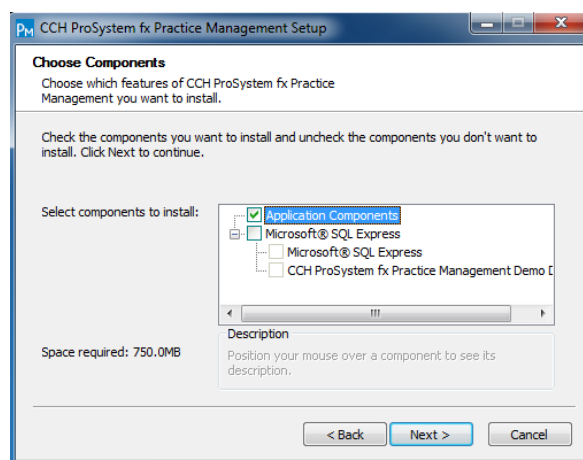
Step 2: Install Microsoft® SQL Express and CCH ProSystem fx Practice Management on the server

1. **Shut down** everything that is running on the server and exit all applications.
2. If you downloaded the software, browse to the location where you saved the file CASPM20XXXXXX.exe and double-click it.
3. The main installation window displays.

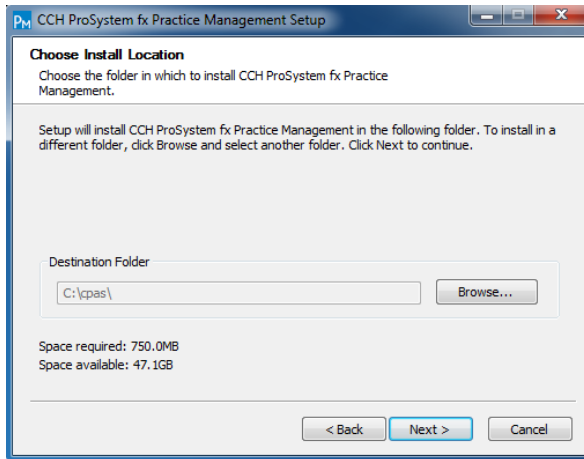
The **Installation Guide** is available in PDF format and displays in Adobe® Acrobat Reader (or the software you use to open PDF files by default).

4. **Select Install** CCH ProSystem fx Practice Management. A please wait window displays while loading the Setup Wizard.
5. **Click Next** when the Setup Wizard window displays.
Select “I accept” when the License Agreement displays. Then click Next.
6. **Select Components** to install on your Server.

- The Choose Components window displays to install on your Server.
- The check box for **Application Components** (to install CCH ProSystem fx Practice Management) is selected by default.
- If you have not previously installed SQL Server®, you can select to install Microsoft® SQL Express and the CCH ProSystem fx Practice Management Demo Data. Click **Next**.

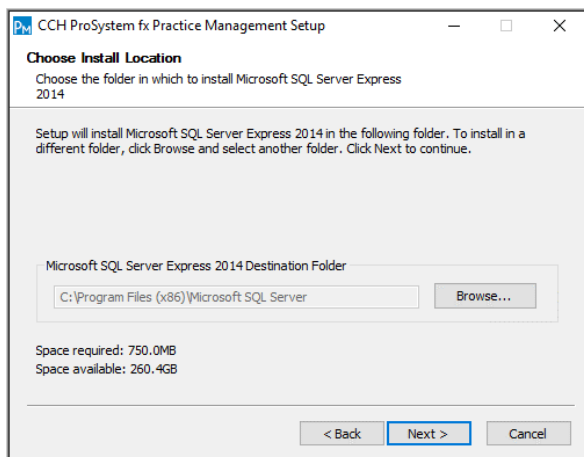


7. **Click OK** to install to the default directory of \cpas when the Choose Install Location window displays.

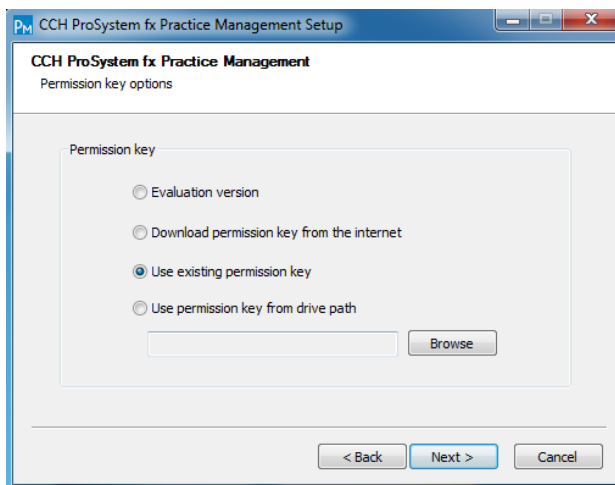


- Select the install location for CCH ProSystem *fx* Practice Management.
- If you wish to change to a different path, click **Browse**, select the directory from the list, and click **OK**.
- If the folder you enter does not exist, you can select to have Setup create it for you. Click **Next**.

If the install detects that Microsoft® SQL Express must be installed, a second Choose Install location window displays.



- Select the install location for Microsoft® SQL Express.
 - If you wish to change to a different path, click **Browse**, select the directory from the list, and click **OK**.
 - If the folder you enter does not exist, you can select to have Setup create it for you. Click **Next**.
8. A permission key is required for licensing. The same permission key can be used for all Wolters Kluwer Tax and Accounting products. Select one of the permission key options for this installation.

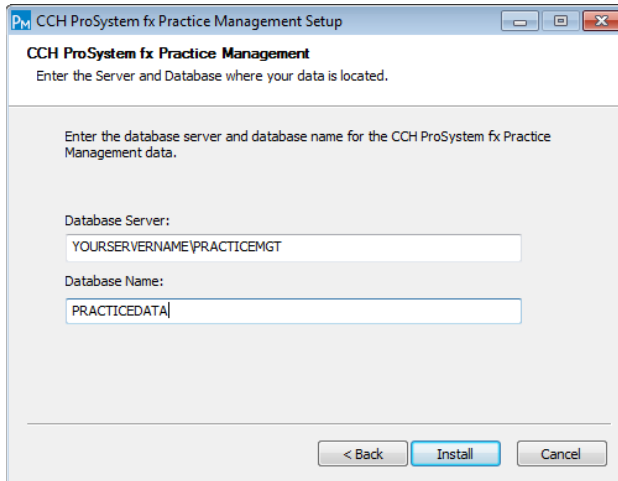


If a CCH permission key is detected on the server, **Use existing permission key** will be selected by default. If a permission key is not detected, this option will be disabled.

- **Select Download permission key from the Internet** if you want to download the permission key from the Internet. After clicking **Next** you will be asked to log in to the Single Sign-On (SSO) web page with your User ID (CCH ProSystem *fx* Account Number) and password. Note that this feature is not available to Canadian customers. Canadian customers have to download their permission key from our download service (see step 1 for instructions) and select the option **Use permission key from drive path**.
- **Select Use permission key from drive path** if you want to browse to a permission key file that is stored in a folder on the network or on a disk drive. Enter the location of the permission key file (or click **Browse** to locate the file).
- Select **Evaluation version** only as a temporary option if you do not know your CCH ProSystem *fx* Practice Management Account Number and have not obtained a password. The installation continues after selecting the evaluation version but you will be limited to 2 employees. Once you finish with the evaluation, identify your

Account Number and call Customer Service at **1-800-268-4522** to obtain the password. Then run the installation again to become fully licensed by selecting a different permission key option. **Click Next.**

9. Now enter information about your server and database.



- **Database Server** – If you are installing Microsoft® SQL Express, this is the name of the Host Server. **Write this information down as you will need it for Step 4** (when you create your CCH ProSystem *fx* Practice Management database).
- **Database Name** – Enter the name of your NEW CCH ProSystem *fx* Practice Management database. Do not use any special characters in the name of the database. **Write this information down as you will need it for Step 4.**

Example: practicedata

10. **Click Install** to begin the installation of CCH ProSystem *fx* Practice Management.

11. If you are installing Microsoft® SQL Express, .NET Framework 3.5/4.6.1 will need to be installed with this release if not already installed. You may be prompted, depending on the server's operating system, to confirm downloading of the files. If prompted, click **Download and install this feature**. The download may take several minutes. Otherwise, .NET Framework 3.5/4.6.1 will be automatically installed. When completed, you do not need to restart the install.

12. A message tells you that the Installation is being installed and then a message when completed. Click **Close**. Due to the installation of the .NET Framework 3.5/4.6.1, a reboot of the server may be required. If prompted, complete steps to reboot the server.

13. **Continue** to Step 3.

If you used the download version of the software, we recommend that you create a backup of the setup and keep it in a safe location in case you need to re-install the software or access the **Documentation** link.

You may need to restart your server before you can use CCH ProSystem *fx* Practice Management. If you are asked to restart your server, and if you answer Yes, the server will be rebooted. Restart when it is convenient for your firm. Click Yes to restart now, or No to restart later.

Step 3: Set up individual workstations

Follow these instructions for each workstation on which you will run CCH ProSystem *fx* Practice Management. If you add workstations, remember to run Workstation Setup on these new workstations as well.

Note: If you have not run Workstation Setup you will be prompted to do so when you open CCH ProSystem *fx* Practice Management on that workstation.

Microsoft® .NET Framework 3.5/4.6.1 must also be installed on each workstation running CCH ProSystem *fx* Practice Management. If you have not already installed .NET Framework 3.5/4.6.1, it will be installed as part of the Workstation Setup. Depending on the workstation's operating system, you may be prompted to confirm and initiate the download and install of the necessary files.

1. **Shut down** everything that is running on the workstation and exit all applications.

Select Windows® key + R.

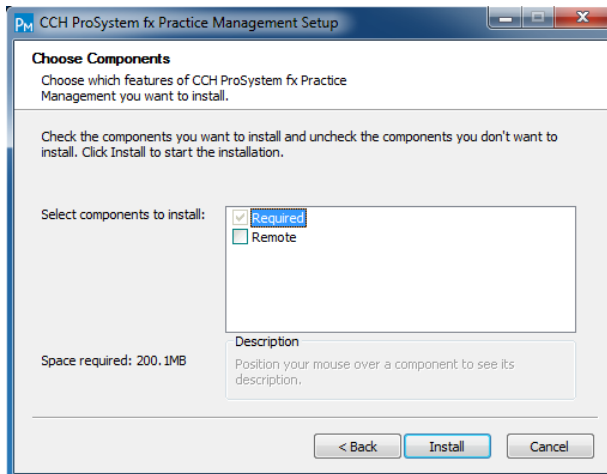
Click **Browse** and select the drive where the application was installed (for example, **f:\cpas\setup\vpm**).

Select **setup.exe** and click **Open**.

Then click **OK** on the Run window.

2. The Install CCH ProSystem *fx* Practice Management Workstation window appears. **Select** Install CCH ProSystem *fx* Practice Management Workstation.
3. The CCH ProSystem *fx* Practice Management Setup Wizard window appears. Click **Next**.
4. The License Agreement displays. Select "I accept" and click **Next**.

5. The Choose Components window displays.



Required components always install. This feature requires 200 MB on the workstation's hard drive.

Select **Remote** if your workstation (PC or notebook) will be carried out in the field or if you plan to run both in-house and in the field. If you are not sure, do not select **Remote**. You can add this feature later by running Workstation Setup again and choosing this option, but you cannot remove it once it has been chosen. This feature requires an additional 750 MB of space on the workstation's hard drive.

6. **Make** your selections and click **Install** to start Workstation Setup. The Installing window displays.
7. .NET Framework 3.5/4.6.1 will need to be installed with this release if not already installed. You may be prompted, depending on the workstation's operating system, to confirm downloading of the files. If prompted, click **Download and install this feature**. The download may take several minutes. Otherwise, .NET Framework 3.5/4.6.1 will be automatically installed as part of the Workstation Setup.

Click **Close** when complete. There is no need to restart the install. The install will continue automatically.

8. **Click Close** to complete Workstation Setup. A progress bar shows that the workstation is being configured. A message displays when Workstation Setup is complete.

Due to the installation of the .NET Framework 3.5/4.6.1, a reboot of the workstation may be required depending on the workstation's operating system. If prompted, complete steps to reboot the workstation.

Remember to run Workstation Setup on each workstation that uses CCH ProSystem *fx* Practice Management.

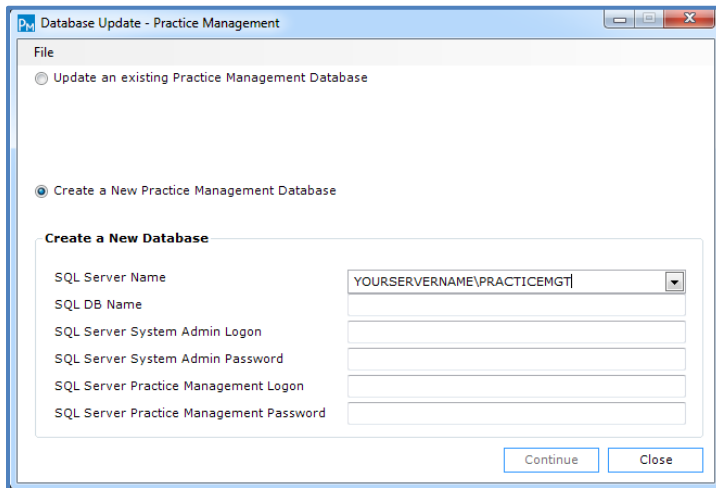
9. **Continue with Step 4** and create your CCH ProSystem *fx* Practice Management database.

Step 4: Create the database

Now create a new CCH ProSystem *fx* Practice Management database. If you are converting, Professional Services will use this as a “shell” database for your converted data.

To create a new CCH ProSystem *fx* Practice Management database

1. Select **Windows® key + R**. Browse to your **cpas\vpms\updates** directory (on the server where CCH ProSystem *fx* Practice Management was installed) and select **versiondb.exe** to create the new database. Click **Open**. Click **OK**.
2. Select **Create a New Practice Management Database**. The window changes to display additional information.



The screenshot shows a Windows dialog box titled "Database Update - Practice Management". It has a "File" menu and two radio button options: "Update an existing Practice Management Database" (unselected) and "Create a New Practice Management Database" (selected). Below the options is a section titled "Create a New Database" with several input fields: "SQL Server Name" (a dropdown menu with "YOURSERVERNAME\PRACTICEMGT" selected), "SQL DB Name", "SQL Server System Admin Logon", "SQL Server System Admin Password", "SQL Server Practice Management Logon", and "SQL Server Practice Management Password". At the bottom right of the dialog are "Continue" and "Close" buttons.

3. Enter the following information:

SQL Server® Name – Enter the name of your SQL Server®.

SQL DB Name – Enter the name you will use for your SQL database. This name was created in Step 2 when you installed CCH ProSystem *fx* Practice Management. It should not contain any special characters.

SQL Server® System Admin Logon – Enter the Admin (sa) logon used to log on to the SQL Server®.

SQL Server® System Admin Password – Enter the Admin (sa) password for the SQL Server®. If you selected to install Microsoft® SQL Express when you installed CCH ProSystem *fx* Practice Management (in Step 2), the Admin (sa) password defaults to **PracticeUser1**.

SQL Server® Practice Management Logon – Enter the logon code CCH ProSystem *fx* Practice Management will use when logging on to SQL. CCH ProSystem *fx* Practice Management uses this logon internally. We recommend **practice**.

SQL Server® Practice Management Password – Enter the password CCH ProSystem *fx* Practice Management will use when logging on to SQL. CCH ProSystem *fx* Practice Management uses this password internally. We recommend a strong password (for example, **PracticeMgt1**).

4. Click **Continue** to create the new SQL database for CCH ProSystem *fx* Practice Management.
5. The installation of CCH ProSystem *fx* Practice Management ends here. At this point you begin CCH ProSystem *fx* Practice Management Setup. **Your System Administrator should now begin to set up the new firm.**
6. Enter the **Firm Name** and **Firm Fiscal Year-End** date. The Firm Fiscal Year-End date defaults to 12/31 of the current calendar year. **Make sure you enter the date correctly as it cannot be changed.** Click **OK** to save the firm information. A Checklist for Setting Up Your Firm displays. Use this checklist to set up firm lists.

If you are converting, you must set up:

General Firm Information

Default Invoice Formats (if used by your firm)

Employees

Service codes (not required for due date and clients only conversions)

Offices (if used by your firm)

Departments (if used by your firm)

Sales Tax (if used by your firm)

Finance Charges (if used by your firm)

Projects (if converting due date information)

For more information about CCH ProSystem *fx* Practice Management setup, see **Set up your CCH ProSystem *fx* Practice Management database** in Step 6.

Once you complete setting up basic firm information, return to Step 3 of the installation (page 10) to set up all other individual workstations that will be running CCH ProSystem *fx* Practice Management.

7. If you are converting, coordinate the transfer of this “shell” database and your existing data to Professional Services. Make sure you schedule your conversion in advance. We will convert your data and return it to you in this database. You can then begin using CCH ProSystem *fx* Practice Management.

Step 5: Verify your SQL backup routines

Do you have a SQL add-on to your current backup software?

- If the answer is **Yes**, refer to your backup documentation on how to back up a SQL database.
- If the answer is **No**, contact your backup software provider for more information.

Step 6: Set up your CCH ProSystem fx Practice Management database

If you are a NEW firm and are setting up your database for the first time, use these helpful hints. This information is useful to the System Administrator who will be setting up CCH ProSystem fx Practice Management at your firm.

If you are converting, coordinate the timing of your installation with your data conversion. Your sales representative will coordinate the timing of the conversion with Professional Services. Prior to the conversion date, Professional Services will send your firm several documents, including:

- **Questionnaire** - Details the data files to send and how to submit the files, conversion instructions, and any special instructions with details that apply to your firm.
- **Frequently Asked Questions** – Answers many questions about the data conversion.
- **Creating Cross Tables** – Used if you want to change the format of your clients, employees, service codes, or any custom fields.
- **Conversion Setup** – Explains how to create a “shell” database with basic information prior to the conversion.

Contact Professional Services if you have not received your conversion packet.

Whether you are setting up your database information or converting, you must **set up your firm and at least one employee** before you exit CCH ProSystem fx Practice Management (see page 16).

Creating your firm

Firm Setup (from Administration) contains information about your firm. Enter the Name and Address of your firm. **Enter the FYE Date correctly as it cannot be changed** after you click **OK**.

Select the **General Information** tab and select the choices suitable for your firm.

If you want to customize the client staff position labels and project tracking status labels throughout CCH ProSystem *fx* Practice Management, select the **Client Staff Positions** and **Project Status Dates** tabs.

Select the **Time Notifications** tab and enter optional settings for Paid Time Off warnings and MTD Calendar Time notifications.

Select the **Time Entry** tab and enter optional settings to associate user-defined information (for example, a municipality code for tax reporting) to all time and expense entries and to set Time Entry and Project prompts.

Click the **OK** button to save firm information.

Before you exit CCH ProSystem *fx* Practice Management, select Employees in the navigation bar in Administration and set up the system administrator. Give that employee setup privileges (select Security Setup on the **Firm** menu). Then, log on using that employee's code to finish setting up your firm lists.

Creating your invoice format

Use the Invoice Format option from the **Firm** menu (selecting Firm Invoice Format Setup) to format the look of your firm's default invoice.

Select Custom Header-Footer to create additional headers-footers to apply as an Office default or as an override at the client level.

Select French Format Options to format the look of your Firm's default French language invoices (if your Firm has French-speaking clients).

When you create clients you can choose to either use the format created here or create a format specifically for that client. You can also select any invoice format for a client at the time of billing.

Creating your lists

List information includes:

Bank Accounts	Finance Charges	Line of Business
Departments	Sales Tax States	Skill Levels
Regions	NAIC Code	CPE Categories
Offices	Summaries	CPE Types
Reasons	NAIC Codes	

Once you have set up your service codes, employees, and clients, you can return to Lists and set up these options:

Note Topics	Client/Lead Custom Fields	Contact Categories
Entity Types	Employee Custom Fields	Business Affiliates
Work types	Project Custom Fields	Referrals
Affiliate Types	Referral Custom Fields	Referral Type
Project Types	Standard Paragraphs	Marketing Methods
Project Positions	Tracking Status	Mailers
Business Affiliate Custom Fields	Leads	

Additional information on setting up lists can be found in Help (press F1 on any window) and in the Getting Started Guide.

Creating your service codes

Service codes identify each task performed by employees in the firm. When employees enter time and expenses, they choose service codes to indicate the type of work performed. Select Service Codes in the Administration navigation bar.

Service codes are classified into groups called categories and subcategories. For example, you could have a category called Tax with several subcategories, such as 1040 and 1120. Under the 1040 subcategory you could have several detailed service codes such as “1040 Preparation” and “1040 Signoff.” Statistics are available at the detail service code level in addition to the summary levels of category and subcategory.

All service codes **must** contain a category, subcategory, and a detail (service code) level. Plan your service codes on paper first before you enter them in CCH ProSystem fx Practice Management.

Categories, subcategories, and service codes allow for separate French text. Invoicing clients with French selected as the Invoice Language will include the customized text appropriate for the invoice format.

Creating your employees

The Employee list contains information about your firm's employees. Select **Employees/Employee Setup** in the Administration navigation bar.

If you plan to interface CCH ProSystem *fx* Practice Management with Client Accounting Suite, Accounts Payable, make sure that the employee codes you enter in CCH ProSystem *fx* Practice Management match the firm employee codes you enter in Accounts Payable.

Creating your clients

The Client list (from Clients in the Lists category of the Administration navigation bar) contains information about your firm's clients and prospects. Clients who employ your firm for more than one task (such as tax and audit work) can be set up with engagements (or accounts). If a client has engagements, set up the client first and then add the engagements.

French can be selected as the invoice language for French-speaking clients.

Starting CCH ProSystem *fx* Practice Management

Once you've installed CCH ProSystem *fx* Practice Management you are ready to start the software.

CCH ProSystem *fx* Practice Management can be started from the **Program** menu or from a shortcut on the desktop (if you've created one). Follow one of these methods to start the software.

To start CCH ProSystem *fx* Practice Management

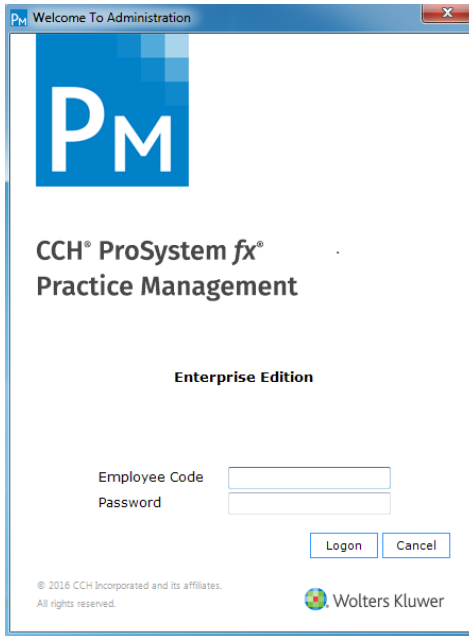
1. Select **Windows® key + R**, point to Programs, and then point to CCH ProSystem *fx* Practice Management. Select CCH ProSystem *fx* Practice Management. All modules installed on the workstation are listed. Select Administration.
2. Or, if you have created shortcuts on the desktop for CCH ProSystem *fx* Practice Management, double-click the Administration icon.

To log on BEFORE you have set up your firm and employees

1. Log on with the Employee Code SUPERVISOR. Once you have created employees, everyone will log on with their unique Employee Code, assigned in the Employee list. (The SUPERVISOR logon is for initial setup only.)
2. Click **Logon** and when prompted enter the password you want to use with the SUPERVISOR logon.

Passwords are optional for all logon codes except SUPERVISOR. You can modify the security privileges for any employee to require passwords and protect employee data.

3. Click the **Logon** button to continue.



To log on AFTER you have set up your firm and employees

1. When you select CCH ProSystem fx Practice Management, the Logon window appears.
2. Enter the Employee Code assigned to you on the Employee list and click **Logon**. If you are required to use a password, you will be prompted to create one the first time you log in.

Note: If you have installed the Demo Data you can log into CCH ProSystem fx Practice Management using the **CPAS** Employee Code. Review the Demo before setting up your own firm data.

User Assistance Tools

In an effort to optimize our products, we provide the following user assistance tools.

Training

Wolters Kluwer provides training on many of our products. Training options include in-depth Web based or on-site training on different topics. Contact your sales representative for more information.

Support

If you have any questions, contact Customer Support at **1-800-268-4522** or send an e-mail to csupport@wolterskluwer.com. For support hours, consult the Wolters Kluwer Web site: <https://wolterskluwer.ca/about-us/contact/>.

Downloading the software

To download the latest version, please proceed as follows:

1. Click the following link: <https://support.wolterskluwer.ca/en/download/>.
2. Enter your Username and Password in the "Connection" section.
3. In the **Dashboard** page, click **Download** in the left hand menu, then select **Files Centre**, or click the **Files Centre** button in the "Download" section.
4. Select **CCH ProSystem fx Practice Management**.
5. Read and accept all the terms of the License Agreement.

You will now be able to download the documentation and the latest version of the software. We also recommend that you save the files to a temporary location on your workstation.

If you need assistance to retrieve your username and password, contact Customer Service at 1-800-268-4522 or send an e-mail to cservice@wolterskluwer.com.

Adding Additional User Licenses

Ordering Additional User Licenses

Licenses for CCH ProSystem *fx* Practice Management are part of the Permission Key. Call your Canadian Account Service Representative at 1-800-268-4522 to place your order.

To install your new Permission Key, proceed as follows:

1. Log in to CCH ProSystem *fx* Practice Management.
2. Select Help/CCH About ProSystem *fx* Practice Management from the main menu, then click the **Additional Info** button.
3. Scroll down the screen to Server Application Path.
4. Write down the path.
5. Unzip the permission key file you downloaded from our Download Centre.
6. Copy the five files within the zip file.
7. Paste all five files into the permkey folder located in the server application path that you wrote down at step 4. The path should be [server]:\cpas\vpm\permkey.

Note: When pasting the files, choose the copy/replace or override option to replace the existing files.