CCH® ProSystem *fx*® Practice Management

Release Notes
Version 2020.20.01
July 2020

CCH ProSystem *fx* Practice Management

Welcome to CCH ProSystem *fx* Practice Management **2020.20.01**

These *Release Notes* provide important information about the 2020.20.01 release of CCH ProSystem *fx* Practice Management. Please review this information carefully. If you have any questions, contact Customer Support at **1-800-268-4522** or send an e-mail to csupport@wolterskluwer.com.

Please follow the instructions below to download the new version:

1. Access the Download Centre.
2. Type your username and password in the **Login** section and click **Log In**.
3. In the **Dashboard** page, click the **Files Centre** button in the **Download** section**.**
4. In the **CCH Accountants' Suite** section, click **CCH ProSystem *fx* Practice Management**.
5. Read and accept all the terms of the License Agreement.

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

New in this Release

We have enhanced CCH ProSystem *fx* Practice Management features and resolved known issues in CCH ProSystem *fx* Practice Management.

Enhancements to CCH ProSystem *fx* Practice Management

UPDATED LOOK AND FEEL

The look and feel of folders and grids have been updated. As a result, folders now have a pale almond back colour and the grid row size has been increased for easier reading. In addition, lookup columns have a white background while the remaining columns have a blue and white alternating background.

BILLING

AUTO APPLY PROGRESS OPTION

Quick Bill Auto Apply is a new option when billing. This option provides a quick way to apply outstanding progress amounts when billing multiple engagements. If the engagements have outstanding progress amounts and the distribution of the progress against the billing should be a re-distribution, the re-distribution can now be done automatically when creating a Quick Bill. Security for **Quick Bill Auto Apply** (to enable the **Allow Auto Apply Progress for multi engagements** option) in the **Security Setup** dialog box of the **Billing and Invoicing Privileges** section defaults to **No**.

DASHBOARDS

NEW TAB IN EMPLOYEE DASHBOARD

The **Employee Dashboard** module now has a **Banked/Used Hrs** tab in which the banked and used hours are detailed by date, which allows employees to remain up to date. Security for the **Banked/Used Hrs** tab in the **Employee Dashboard** section of the **Security Setup** dialog box defaults to **Yes**.

NEW TAB IN CLIENT DASHBOARD

The accounts receivable information on the **Client Dashboard** now displays on its own tab, i.e. **Accts Rec**, for a better view of data on both the **General Information** tab as well as the new tab. The **Accts Rec** tab is now the last tab to the right (after the **WIP** tab). Security for the **Accts Rec tab** in the **Client Dashboard** section of the **Security Setup** dialog box defaults to **No**.

ACCOUNTS RECEIVABLE STATEMENT FORMATS

The Accounts Receivable statement criteria has a new format option, i.e. **Remaining Amount**, to automatically include only clients that have an outstanding balance as of the cut-off date.

GL ACCOUNTING REPORT PERMISSION

A new option in Security Setup under Administration now provides permission to access the *GL Accounting* report available in Administration Activities. **Default for this new option is Yes.**

REPORTING

REPORT WRITER TRACKING PROGRESS BALANCE AMOUNTS

When using the *Progress History* report type or template (under Client), you may set up a column to view the amount of progress billed and applied by date. You can now add the **Progress Balance** column to show the balance for each row. Use totals for all three columns to see the progress balance as of the end date entered.

INVOICE FIRM LOGO

Previously, when a firm got a new server or moved the location of the logo used in CCH ProSystem *fx* Practice Management invoices, a call was placed to support to replace the location of the logo held in CCH ProSystem *fx* Practice Management. Now, once you change the location of the logo, select **Change Invoice Logo Location** on the **Utilities** tab from the menu bar in Administration and enter the original location and the new location of the logo. This utility will replace the storage address of the old location with the new location.

Issue Resolution

The following section contains information about resolutions to known issues:

ACCOUNTS RECEIVABLE

- Enabling the **All Employees** option when printing deposit slips now adheres to the Employee Lookup Security.

ADMINISTRATION AND BILLING

- Correcting WIP for a non-billable client no longer requires a project selection when the firm option to require projects for non-billable clients is disabled.

CONTACT MANAGEMENT

- The project tab in Contact Management now correctly applies the security for "Project Lists – All Projects (not limited by Employee Logged On/In Charge)"

PROJECT

- Under **Projects > Create Lists > Setup project Custom Fields**
  The **Custom** fields can no longer be edited without the appropriate security under **Security Set Up > Project tracking (Dashboard) > Edit Project Custom field**.
  (Previously, if the security for editing **Custom Fields** under **Project Tracking (Dashboard)** was disabled for the user, the fields would still be editable.)

REPORTS

- All Reports: The vertical scroll bar is now available to select one or more employees on the employee tab within the setup for each report.
- Billing Worksheet: An error is no longer generated running with the **Summarize Progress Detail** option enabled and a firm fiscal year end of 02/29.
- *Billing Report*: Generating the Billing Report for Unposted Billings no longer produces an error.
- *High Client Billing Report*: When running by Bill Manager now sorts correctly by Bill Manager.
- *Tax Routing Slip*: This report now correctly reports only the employees associated with the projects selected based on the chosen report criteria.

Support of former versions or environments now discontinued

As your software partner, we strive to provide you with the highest security possible when accessing our products and Web sites. We can only do that by supporting the most recent versions provided through our vendors' supported environments.

At Wolters Kluwer, we are adopting the policy of working within the latest two versions currently released in the market for these supported environments. While we may not always be aligned with this policy due to release timing, our goal is to either follow the vendor lifecycle policy or support the last two vendor versions and discontinue support for anything older.

Recently discontinued support:

- Microsoft® SQL Server 2012/2012 R2 – Support ended November 30, 2019.
- Windows 7, Professional Edition or above - Support ended November 30, 2019
- SQL Server 2012 - Support ended November 30, 2019

This does not mean our products will automatically stop working with these older versions. However, if there are functionality issues on non-supported environments, Wolters Kluwer will not provide support or address the issues by making changes to its applications for these older non-supported environments.

Getting Started with the July 2020 Release

The Minimum System Requirements have changed. They can be found here.

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 2020 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.

Installation Instructions

You will receive an e-mail notifying you of an updated release. All modules of CCH ProSystem *fx* Practice Management should be shut down, including the Tray (PMTray.exe) prior to the installation.

Make sure that you have your username and password handy before starting the installation. You will need this information to login to our Download Centre. If you require assistance to obtain your username or password, please contact Customer Service at **1-800-268-4522**.

1. Download CCH ProSystem *fx* Practice Management by following the instructions provided at the beginning of the *Release Notes*.
2. 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 CCH ProSystem *fx* Practice Management installed. You do not need to run this update from the server.
3. Browse to the location where you saved the file **CASPM20XXXXXX.exe.**
4. Double-click the **.exe** file to initiate the update. Choose the extraction location for the temporary setup files.
5. Follow the on-screen instructions to complete the installation.
6. 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).
7. When the VersionDB window displays, select to update an existing CCH ProSystem *fx* Practice Management database.
8. Enter your SQL server name and SQL database name and click **Continue**.
9. You must run the workstation setup on **all** workstations for this release to update the required application components.

For New Installations

You should receive a new customer welcome e-mail that provides you with instructions on how log into our Download Centre.

Follow the instructions above to download CCH ProSystem *fx* Practice Management.

1. After the download is complete, 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.

Special Notes about Updating from a Previous Version of CCH ProSystem *fx* Practice Management

The following should be kept in mind when updating from a previous version of CCH ProSystem *fx* Practice Management.

- **Backups.** Always verify that you have a current backup before installing updates.
- **All modules of** CCH ProSystem *fx* 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.
- **Database Updates**. You must run Versiondb.exe to update your CCH ProSystem *fx* Practice Management database.
- **Permission Keys.** You must have your username (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.
- **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.

If you have any questions, contact Customer Support at **1-800-268-4522** or send an e-mail to csupport@wolterskluwer.com.

Thank you for choosing CCH ProSystem *fx* Practice Management.

Wolters Kluwer Canada