

CCH Access™ Data Access Utility

Welcome to Data Access Utility 2017-4.1

This bulletin provides important information about the 2017-4.1 release of CCH Access™ Data Access Utility. Changes from the 2017-3.4 release are also summarized at the end of this bulletin.

Important Update Instructions

A few columns were renamed or removed from the Data Access Utility database with release 2017-3.4 on May 1, 2018. Carefully review [the update steps](#) to determine if these changes affect you.

New in this Release (July 2018)

Installer Download

You may download a copy of **Data Access Utility Download.exe** from the Admin page of Data Access Utility Manager.

Technical Resolutions

This section contains information about issues that are resolved in this release.

Empty Columns Removed

- **Client Names.** With release 2017-3.4, the columns ClientName and ClientName2 of the CLIENT entity were always empty. These columns have been removed. Instead, you may use Client.SortName or name columns from the client type specific entities.
- **Billing Fee Agreement Service Code.** The column CLIENTBILLINGFEEAGREEMENT.BillingFeeAgreementServiceCode was always empty. This column has been removed.

Long Invoice Title

Invoice titles longer than 50 characters caused an error when updating the Data Access Utility database. Titles up to 75 characters are now allowed both inside of CCH Access™ and the Data Access Utility.

Project Business Unit History

Previously, an incremental update of PROJECTBUSINESSUNITHISTORY always created the error (400) Bad Request. This entity will now update successfully.

Client Non-Profit and Tax

Previously, full load and incremental updates of CLIENTNONPROFIT and TAXRATE always created the error (401) Unauthorized. These entities will now update successfully.

New in Release 2017-3.4 (May 2018)

New Project Data Entities

Six new entities about your projects include budget (PROJECTBUDGET), custom fields (PROJECTCUSTOMFIELD), delivery methods (PROJECTDELIVERYMETHOD), related projects PROJECTRELATEDPROJECTMAP, linked objects such as tax returns (PROJECTLINKEDWORKOBJECTS), and business unit changes (PROJECTBUSINESSUNITHISTORY).

Restructured Database

Several structural changes are introduced to make transport of data more efficient and Data Access APIs more consistent with other APIs in the CCH Access Open Integration Platform. Refer to table definitions for more details.

- **New Client Entities.** Five new entities (CLIENTCORP, CLIENTCUSTOMCLIENTTYPE, CLIENTFIDUCIARY, CLIENTNONPROFIT, CLIENTPARTNERSHIP, CLIENTSOLEPROPRIETORSHIP) are introduced for attributes that do not apply to all client types.
- **Individual Client** (CLIENTINDIVIDUAL). A column for client birth date is added and other columns are renamed to make their purpose clearer.
- **Common Client** (CLIENT). Columns that do not apply to all client types or require CCH Access™ Practice are removed from this entity. Several new date fields are added. A few fields are renamed to make their purpose clearer.
- **Practice Client** (CLIENTPRACTICE). Several columns are added, renamed, and removed.
- **Service Code Categories.** Two new entities SERVICECODECATEGORY and SERVICECODESUBCATEGORY allow you to aggregate by category and sub-category.
- **Billing Rates.** Understand the service code and client billing options that affect how rates are calculated on new WIP. Refer to the new entities TAXRATE, SERVICECODERATE, and SERVICECODETAXRATE and the updated entity CLIENTTAXRATE. Project rate data is planned for a future release.
- **Client Contact Information.** Version3 of the CLIENTADDRESS entity removes some fields that are duplicate or not useful. Also, the addresses selected on the billing options of the client profile were moved from CLIENTADDRESS to CLIENTPRACTICE. The new entity CLIENTBILLINGMAIL contains a reference to the rows in the CLIENTEMAIL entity that receives an invoice and/or statement. Version2 of CLIENTIMADDRESS removed a few fields that are not useful and added reference to the staff who created or changed the entity data.
- **Marketing.** Client Manager mailing lists are available via new MAILINGLIST AND MAILINGLISTASSIGNMENT entities.
- **EPay and AR.** ARTRANSACTION now includes the name of payment method. ARDISTRIBUTION lets you associate distribution details with ARCHARGES.
- **Billing Fee Agreement** (CLIENTBILLINGFEEAGREEMENT). Adds 16 fields, renames one, and removes three.
- **Staff Business Hours.** The new entity STAFFBUSINESSHOURS allows linking BUSINESSHOURS and STAFF.
- **Miscellaneous.** A few fields that are not useful were removed from CLIENTCRS and WIPLOG.