Release Notes

CCH Axcess™ Client Collaboration

Welcome to CCH Axcess Client Collaboration Release 3.4

This bulletin provides important information about the 3.4 release of Client Collaboration. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release - Firm User Updates

User Activity Reports
User Activity Audit Reports are now available in Client Collaboration. You can run firm-wide reports by Client or Firm user type, or run user-specific reports, searching users by their email address or name.

Notes

- Reports will expire 7 days from the date the report is created.

- Firm Users will be able to view the client data only for the clients which they have been granted access to.

- Firm users will be able to view other firm user data only if that firm user has been granted the Administration Edit Functional Right.

Firm-wide reports
Firm-wide reports provide a comprehensive, detailed listing of your clients or your staff. These reports include information such as the user's first and last name, email address, and any details about activities performed by each user.

User-specific reports
User-specific reports can be run for a single user by their email address or name. These reports include the user's first and last name, email address, and any details about activities performed by each user.

New in this Release - Client User Updates

- Nothing at this time.

Fixed in this Release

Welcome Back Emails
Welcome back emails were not being triggered for all returning clients, the issues were identified and fixed.

Batch Send
The issue has been resolved when client request email addresses were missing in the batch send. Now, the batch will process successfully, and only client requests with the missing email addresses will move to the error tab.