

CCH Access™ Document

Welcome to CCH Access 2016-4.1

This bulletin provides important information about the 2016-4.1 release of Document. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

New in This Release

Attaching PDFs from CCH® Access™ Document in CCH® Access™ Tax

You can now attach a PDF from CCH® Access™ Document in CCH® Access™ Tax. Click in the PDF File Name field and click **Document** from the Attach File window. The Document window displays a list of PDFs for your client. It is recommended that you link your client prior. If you haven't linked your client, you will be prompted to do so when you click Document.

Microsoft® Office 64-bit Compatibility

Document Plugins are now compatible with Microsoft® Office 64-bit.

Common Updates

Client Dashboard

Client notes in the Client Dashboard now include notes about contacts assigned to the selected client. Both client notes and contact notes may be given a due date, assigned to someone in your firm, and marked complete. A new design allows you to add, delete, and modify notes with fewer steps. You will see three sections of notes:

- **General notes** — Notes without a due date
- **Needs action** — Notes with a due date that are not complete
- **Action completed** — Notes with a due date that are complete

The same notes remain in the client profile and client contact profile, but without the new attributes and layout described above. Changes to the note body, subject, date, category, or staff that are saved while in the Client Dashboard also display in the client profile or contact profile. All note changes made in the profiles also display in the Client Dashboard after the client profile is saved. Private notes are only displayed on the client profile.

Refer to [Client Dashboard Help](#) for details about user rights, how to add Dashboard panes, and how to work with notes.

Fixed in This Release

The following have been fixed in this release of Document:

- Selection of multiple items using SHIFT +CTRL selects multiple items in the Recycle Bin.
- Selecting CTRL + F on the File List tab opens the Find box in Document Central.