

CCH Axxess™ Practice

Welcome to CCH Axxess Practice 2017-1.0

This bulletin provides important information about the 2017-1.0 release of CCH Axxess Practice. Please review this bulletin carefully. If you have any questions, additional information is available on CCH [Support Online](#).

New in this Release

Mailing Lists

This update offers two major improvements to mailing lists:

- ◆ Use criteria to assign clients or contracts, making it faster to create a mailing list for a specific customer segment.
- ◆ Export mailing list file with name, physical address, and email.

Mailing lists are now in Client Manager alongside billing groups and client groups. When you open a mailing list, the assigned clients and contacts are displayed in the right panel. To add clients in bulk, choose the kind of recipient to add, select the criteria, and click **Add Recipients**. The criteria you may use are:

- ◆ Contact Category (not available when adding clients)
- ◆ Client Class
- ◆ Client Office
- ◆ Client Business Unit
- ◆ Client Responsible Staff
- ◆ Client Status
- ◆ Client Tax Type
- ◆ Client Type

The recipient list contains clients that are assigned or have a related contact assigned. You may change the assignment of a specific client or contact from their profile or in the right panel of an open mailing list. When you export a mailing list, the system determines the best physical address and best email address based on your choices in the address area of the client and contact profile. Refer to online help to learn how this calculation works.

Security group functional rights are applied as follows:

- ◆ **Administration Manager > Client Manager > Client Profile**: Determines if someone may view or modify the assignments from a client profile.
- ◆ **Administration Manager > Client Manager > Client Profile > Contacts**: Determines if someone may view or modify the assignments from a contact profile.
- ◆ **Administration Manager > Firm > Lists**: No longer applies to mailing lists.
- ◆ **Practice > Client Manager > Mailing Lists**: Determines if someone may manage mailing lists in Client Manager.

- ◆ **Administration Manager > Client Manager > Client Groups (view):** Determines if client groups are visible in the Client Manager. This functional right is required to navigate to the mailing lists view, but does not permit users to manage mailing lists.

NOTE: We strongly recommend you review the membership in the "Full Rights" security group. Staff assigned to this group will be able to obtain names and addresses of all clients and contacts in your firm, including clients assigned to client access groups.

Client Business Code

The IRS has revised the list of Principal Business Activity Codes on 2017 filing instructions for Forms 1065, 1120, and 1120S. There are some additions, some deletions, and some description changes. Refer to CCH Axxess Tax release notes for a full list of these changes.

New codes for 2017 filing are now available in the client profile. If you have any clients with Business Code that is not valid for 2017 filing, we updated the client profile according to the table below.

Original Code	Original Description	Replacement Code	Replacement Description
211110	Oil and Gas Extraction	211120	Crude Petroleum Extraction
532290	Other Consumer Goods Rental	532289	All Other Consumer Goods Rental
452900	Other General Merchandise Stores	452300	General Merch, Warehouse, & Supercenters
452110	Department Stores	452200	Department Stores
532220	Formal Wear & Costume Rental	532281	Formal Wear & Costume Rental
532230	Video Tape and Disc Rental	532282	Video Tape and Disc Rental

Technical Corrections

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

Report Corrections

The following corrections have been made for Practice reports:

- ◆ The Last Edited By data is now updating properly in the Reports Manager.
- ◆ Client Billing Realization report updated the column heading for Net Progress.
- ◆ The AR Register now displays sales tax amounts once when applied to invoices with multiple projects.
- ◆ The PTD RTD WIP/AR Reconciliation realization percent calculation has been corrected.