Wolters Kluwer

Release Notes

Release 2018-3.5
June 2019

CCH Axcess™ Practice

Welcome to CCH Axcess Practice 2018-3.5

This bulletin provides important information about the 2018-3.5 release of CCH Axcess Practice. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release

Electronic Payments Using Cryptocurrency
Practice now allows you to receive payments from your clients who use cryptocurrency. You can set up your firm's wallet with BitPay, and then select BitPay in firm settings for ePay. If you would like to use ePay but are not licensed for CCH Client Axcess, please contact your sales representative.

Preview Release of Enhanced Invoice Templates
We are excited to announce the preview release of Invoice Templates. The new template design uses an interface similar to the invoice editor. If you would like to preview the new templates feature, please open a support case to request it. New options in templates include:

- Paragraphs added in templates now have the options to show amounts and underlines.
- The Totals section allows you to select whether to show total lines, including Prior Balance and Current Amount Due.
- The Service Expense section includes the options available in the invoice editor.

If you are interested in previewing Invoice Templates, please open a support case requesting the Invoice Templates preview.

Data Insights
The Dashboard Application Links now include **Business Intelligence** > **Data Insights** for all staff of firms who use Practice or Workstream. A user with firm setup functional rights can hide the new link or direct it to open Microsoft® Power BI on the Web. Your IT department can follow the on-screen links to learn about how to publish Data Insights and other Power BI files connected to your Data Axcess database. If you are unfamiliar with Data Insights, read more online or contact your solution consultant.

Client Manager Quick Search Export
You can now export all pages from the client quick search view, up to 20,000 rows. Other views in Client Manager continue to export the current page.

Reports Quick Export - New File Type
In addition to existing Quick Export options, you can now export to Microsoft® Excel® XLSX workbooks using the following steps:

1. Select the report from a Reports view.
2. Click **Print Options > Export**.
3. Enter a path, select the XLSX file type, and then click **OK**.
4. Click **Quick Export**.

Modifying Historical Clients and Staff

Historical clients and staff are retained for reporting. They are not visible in most parts of CCH Axcess and cannot be deleted. Beginning with this release, you can change:

- The ID, sub-ID, and sort name of historical clients.
- The user ID, staff ID, report name, and system email address of historical staff.

Modifying these attributes makes the original values available for other clients or staff. It can also offer more control over how historical clients are listed in relation to active clients when grouped, sorted, and subtotaled in reports. You must have the Client ID functional right (Edit) in any organizational unit to edit historical clients. You must have the staff profile functional right (Edit) in any organizational unit to edit historical staff.

Technical Corrections

Invoice Subtotals

The subtotals now print correctly on the invoice when you do not include the amount column for the service and expense section.

Paragraph Amounts

Paragraphs added in templates now default to not show the amount, unless the selected paragraph has a default amount. Previously you needed to edit each invoice created from the template to not show the amount.

Billing Worksheet by Project Report - Deleted WIP

The Billing Worksheet by Project should only show clients with unbilled WIP. Previously, a client would show on this report if the only unbilled WIP was deleted. Now, such clients are omitted from the report.

AR Register Report - Credits Applied to Debits with Sales Tax

Previously, the AR Register report omitted AR Write-Off and Credit Adjustment transaction types under some scenarios when they were distributed to debits with sales tax. Now, the transactions display properly in these scenarios.

Invoice Realization with Reason Code - Hours Entered for Clients that are not the Principal Client

Previously, the Invoice Realization with Reason Code report did not always display the proper hours when clients are in a billing group. The report was showing hours for the principal client only if the hours were entered for the principal client. Now, the report shows all hours billed to the principal client, without regard for which client the hours were entered.

AR Aging report - Last Bill Date and Amount

Previously, the last bill date and amount was omitted from the AR Aging report when the Hide Details option was set to Yes. Now, the last bill date and amount is properly displayed on the report.

Report Options and Settings Disappear on Reports

Two options and settings issues have been resolved for reports created by making a copy of a report that was also created from a copy of a report. For example, you copy a report from Firm Library to My Reports. Later, you copy from My Reports to Shared Reports.

- Previously, resetting the options and settings on the second copy (Shared Reports) resulted in options and settings that matched the first copy (My Reports). Now, resetting the options and settings on the second copy (Shared Reports) results in options and settings that match the defaults from Firm Library.
- Previously, deleting the first copy (My Reports) caused the options and setting to not display on the second copy (Shared Reports). Now, deleting the first copy (My Reports) does not affect the second copy (Shared Reports).

Staff Posted Summary Report - Inactive Service Codes

Previously, WIP was excluded from the Staff Posted Summary report if the service code for a time entry was made inactive after the time was posted. Now, the report includes time for both active and inactive service codes.