Release Notes

Release 2013-3.5
May 2014

CCH Axcess Practice

Welcome to CCH Axcess Practice 2013-3.5

These notes provide important information about the 2013-3.5 release of CCH Axcess Practice. Please review these notes carefully. If you have any questions, contact Customer Support at 1-877-977-9739, Option 4. Additional information is available on CCH Support Online.

Dashboard

Bill from the Client Dashboard

You can now launch Detail Billing directly from the WIP pane on the Client Dashboard after you review the WIP for the client. This saves time by allowing you to review the WIP and launch Detail Billing if you determine the client needs to be invoiced.

Correct WIP from the Client Dashboard

You can now launch the Correct WIP window directly from the WIP pane on the Client Dashboard. This feature helps you to launch Correct WIP more quickly when you find an issue.

Billing

View - Position in List

The program now retains your last position in any billing view when you return to the view. This feature allows you to quickly resume work where you left off, which can save time, particularly in multi-paged views.

Edit/Preview Invoice Option Persists

When you select the Edit/Preview Invoice option on various screens, the program will now remember your selection. This option appears on the Quick Bill, Progress Bill, Apply Progress, and Confirm and Invoice screens. Remembering this selection can save you clicks, allowing you to get through more bills in a shorter period of time.

Invoices

Inactivate System Templates

You can now deactivate system-defined invoice templates that you do not use. Inactive templates will no longer show as available templates for any billing screen. Removing these templates from your list results in a more targeted list, which can reduce time spent searching for the correct template.

Copy Text From Previous Invoices

You can now copy preformatted text from a previous invoice into a current invoice. You can also copy text from any invoice within the selected client's billing group. This feature can save you time by allowing you to open the prior invoice directly from the Invoice Content Manager while creating the current invoice.

Save Invoice Template Selection for Client

You now have the option to specify a default invoice template for a client when you create and save an invoice. This feature allows you to set templates while you are working, rather than requiring you to set templates through a separate workflow.

Accounts Receivable

Accounts Receivable - Default Distribution Method

Practice firm settings now allow you to select a default distribution method for your accounts receivable transactions. This feature can save you many clicks when you enter transactions because the most common distribution option that you use is already selected.

Reports

Client List Report

A new simplified Client List report is available in Reports Manager. This report was streamlined to provide faster access to key client information such as a simple address, phone, or email list for your clients. Also, the Client List report has been renamed Client Profile to more accurately describe the purpose and use for the report.

Technical Corrections

Accounts Receivable

- When using the enter key to save a transaction, the focus goes to the correct field when entering the next transaction.
- Accounts Receivable Aging now displays in the correct buckets on the Client Dashboard, Invoices, and Statements.

Time Capture

- When entering time using the Tab key, the Workstep field is highlighted if you are using autofill or editing a transaction. If you are entering a new transaction, the field is blank and you can begin typing or use your mouse to select a workstep.
- You now receive only one notification for the "Transactions ready for release" notification.
- You can now view your transactions with proper permissions set in time capture views.

Billing and Invoicing

- Pagination is now correct for newly created invoice views.
- When using Apply Progress for a group of clients, the program generates only one invoice per client.

Reports

- The Accounts Receivable Aging and Accounts Receivable Detail Aging reports now consistently display correct amounts for invoice amounts.
- The Accounts Receivable Aging report now displays the correctly distributed aging when you choose Invoice date for the "Count days old of distributed A/R using" option on the report.
- The WIP/AR Aging report now displays finance charges and associated invoices and payments appropriately.
- The WIP/AR Reconciliation report now displays one total for each client responsible staff assignment when the report is set to group and total by a particular client responsible staff assignment.
- The Billing Register report now displays each invoice one time for a client.
- The Intracompany Cost and Profit report now displays correct information for expenses.