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CCH

Release Notes

Release 2013-5.0
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CCH Axcess Practice

Welcome to CCH Axcess Practice 2013-5.0

This bulletin provides important information about the 2013-5.0 release of CCH Axcess Practice. Please review this bulletin carefully. If you have any questions, contact Customer Support at 877-977-9739, option 4. Additional information is available on CCH Support Online.

Technical Corrections

Setup

- Proper validations and error messaging appear when deleting service codes that have associated unposted time.
- When selecting multiple clients to Quick Bill, the program honors the correct Firm and Client Specific invoice template settings.
- When a specific staff member is chosen as the recipient for a Time Capture Scheduled Time Missing notification, the program sends the proper number of notifications.
- With Billing open, you can now change the Client Group billing options in the client profile to *Always bill the client individually* without incident.
- Sales Tax Rates now display proper amounts in the client profile.
- You can now open the Billing Options area of the client profile after making changes to the email invoice recipient.

Time Capture

- Import Time Utility now calculates rates.
- When selecting a project, the program displays proper error messaging when the field is optional rather than required.
- Hour and Units now display in separate columns in the WIP pane on the client dashboard.
- Appropriate project information now displays in the grid when correcting WIP.

Billing

- Short Date Key work now displays the appropriate date on an invoice.
- When attempting to use Client Group, the program displays appropriate messaging based on staff permissions.
- Write Off invoices no longer appear in Accounts Receivable as open items.
- When using Reassign WIP, program transfers WIP without changes to expense amounts.
- While using the Detail Bill screen, column settings will persist as you make billing decisions using Final Bill options.
- You can now cut and paste A/R Statement information from page 2 of an invoice to page 1 without incident.
- When using Standard Paragraphs, the program calculates the remaining amount as each paragraph is added.
- Alignment is correct when you reopen an invoice and change the Invoice Template selection.
- You can print invoices from the Invoice pane in the client dashboard without issue.
- Client Name keywords now wrap properly from line to line in custom headers and the body of invoices.

- Reimbursable expenses now display properly based on invoice template settings for *Show expenses separately from services as one amount*.

Accounts Receivable

- You can now apply payments appropriately when prorating write downs in billing by hours.
- Only the appropriate statements generate based on the date set in the *Last Invoice is dated after* field.

Reports

- When reports are exported to Microsoft® Excel, extra date and time information doesn't export in the footer. The 201 watermark no longer displays.
- Client Billing Realization now displays proper amounts for Applied Payments.
- Monthly Comparison, Staff Productivity, and Firm Management reports now display proper Prior Period amounts.
- PTD/RTD WIP/AR Reconciliation, WIP/AR Reconciliation, and General Ledger Reconciliation now display proper beginning balances when write off amounts are present in the report date range.
- Staff List now pulls proper position information.
- Staff Monthly Comparison now displays proper header information for the data range.
- A/R Detail Aging now exports numbers and currency in the proper format.
- You can now run the Monthly Comparison report by Client Responsible Staff.
- WIP/AR Reconciliation and PTD/RTD WIP/AR Reconciliation no longer display Nonbillable WIP.
- WIP Detail Ledger and Billing Worksheet no longer display transferred amounts for the WIP when transferred from one client to another.
- Staff Productivity displays proper RTD amounts.
- WIP/AR Aging now displays Open WIP balances based on selected cutoff date.

Integration

- Actual hours and amounts now transfer properly from Practice to Workstream and display properly on screens in both modules.