Wolters Kluwer

Release Notes

Release 2015-3.4
April 2016

CCH Axcess Practice

Welcome to CCH Axcess Practice 2015-3.4

This bulletin provides important information about the 2015-3.4 release of CCH Axcess Practice. Additional information is available on CCH Support Online.

Billing and Invoicing

Reprint Prior Invoices from the Client Dashboard

You can now reprint copies of prior invoices directly from the Client Dashboard. To use this feature, first ensure that you have the Invoices pane added to your Client Dashboard. This feature reduces the number of clicks needed to reprint an invoice, which reduces the turnaround time to get the invoice to the customer for payment.

Billing and Invoicing List Totals

The Client, Client Group, and Invoice lists in Billing and Invoicing now display totals for important financial information. The totals shown are totals for all pages in the list, rather than the current page. This update helps you get a more complete picture of unbilled WIP, billed WIP, totals for invoices awaiting approval, and write ups/downs across your entire list of clients. This feature helps you better understand and prioritize how much billing you need to complete to maintain proper cash flow and meet billing deadlines.

Edit Client Address on Invoice

You can now edit the program-generated Client Address that displays on the Edit Invoice and Preview screens. Based upon the number of keywords used in the header, you will be provided with multiple lines you can edit as necessary for your specific invoice. This update reduces the number of clicks and time necessary to edit the address, particularly if the change is not permanent.

Additional Options in Service and Expense Detail Sections

To provide more flexibility in showing service and expense detail on invoices, you can now show invoice descriptions, even if your service and expense section is summarized. This change provides you with more options for displaying detail in the service and expense sections, leading to invoices that send a clearer message to your customers. We also added more grouping and sorting levels, in particular, options for sorting and grouping by date, service code and staff. These enhancements will also reduce the number of manual edits needed in service and expense sections.

Accounts Receivable Statement on Invoices

If your client has an accounts receivable balance, you can now choose to display an Accounts Receivable statement on the invoice. If an AR statement is selected for display in your templates, the statement will display automatically; if needed, you can remove it from individual invoices for each client. You also have the option to add an AR statement on the fly if your template did not already include a statement section. This update provides more flexibility in communicating prior balances to customers, speeding up payment, and improving cash flow for your firm.

Lookup Invoice in Billing and Invoicing

If you know a specific invoice number you need to locate, you can now enter that invoice number in the Invoice Search area at the top right of the Invoice list. This direct entry allows you to bypass adjustments to the column settings and filters to locate the invoice, reducing the number of clicks and amount of time necessary to locate a specific invoice. Once the program locates the invoice, you can perform any invoice action.

Lookup Clients by Invoice Number in Accounts Receivable

If you know the invoice number for a payment, but are not sure which client the payment is for, you can look up the client by invoice number when entering a payment. This feature reduces the amount of time it takes to research, locate the client, and return to accounts receivable to enter the payment.

Bill Through Date

We made improvements to how the program uses the override bill through date, ensuring that the override persists throughout your billing session. We have also tied the override bill through date to the invoice date for firms that selected to use Bill Through Date as the invoice date in their Firm Billing settings.

Technical Corrections

The following section contains information about technical corrections made in this release.

Accounts Receivable

- When entering more than one accounts receivable transaction, the tab key now functions properly.

Billing and Invoicing

- Billing
  - Billing now properly accounts for progress and progress applied amounts when calculating the progress available to apply to the current invoice.
  - Manually entered bill through dates now persist throughout your billing session.
- Invoicing
  - System-generated service code structure paragraphs now display properly on invoices.
  - Invoice List default filters are now applied properly for users logging in after resetting their initial temporary password.
  - The proper client address now displays for clients using Client Address Line 1 and Line 2 in invoice headers.
  - Improved error messages now display when performing large batch invoice status updates.

Other Notable Corrections

- Accounts Receivable panes on the Client Dashboard now display for users with only view permissions.
- Billed and write-down amounts on the Client Dashboard, Billing report, and Client Billing Realization report now reconcile.