Release 2015-4.1
July 2016

CCH Axcess™ Practice

Welcome to CCH Axcess Practice 2015-4.1

This bulletin provides important information about the 2015-4.1 release of Practice. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release

Edit Invoice Total Section
To provide even more control and editing capability in your invoices, you can edit the labels used for each line in the totals section. You can also choose to show or hide certain amounts.

- **Total services and expenses, progress applied, and new progress** – When you progress bill each month and apply the prior progress to relieve WIP, you can hide the services and progress applied amounts in the total section. This feature allows you to both relieve WIP and generate the new progress invoice as a single invoice, rather than as two separate invoices, without being required to show progress created or applied.

- **Courtesy Discount** – When using an invoice template that automatically shows a courtesy discount, you can select to not show this discount in the totals section and show it in a paragraph instead. This option provides greater transparency if needed and gives you an opportunity to provide descriptions or clarification of this discount amount.

- **Prior Balance and Current Amount Due** – You can select to print the **Prior AR balance** as of the Invoice Date (not including the current invoice) and the **Current amount due**, which is the sum of the invoice total and prior balance amounts. If selected, these amounts print after the current invoice total. This option provides you with a convenient way to remind your clients of past due amounts as a seamless part of the invoice, instead of printing a separate AR Statement or including a full AR Statement on the invoice.

Global Font Settings for Invoices
You can now set a firm level font style and size in Firm Settings and Defaults. All new invoices you create will use this firm level setting by default. You can override the firm font settings on specific invoices with unique requirements. You can choose to override the font style and size for the body of the invoice only or for the entire invoice, including the header and footer.

Insert Pictures in Headers and Footers
Adding images to your invoice and statement headers and footers is now easier with a new Insert Picture option in the Invoice and Statement Content Manager. You can browse to select the image file, and the image is placed at your current cursor location.

Date Range Persistence - Invoices List
The date range you select on the Invoice List now persists during your billing session. As you edit, print, or post invoices and switch between Client, Invoice, and Client Billing Group lists, your date filter persists. If you close the Billing and Invoicing window, the next time you open the window, the dates return to the default settings: **From date** - Today minus one year, **To date** - Today's date.