Wolters Kluwer

Release Notes

**Release 2015-5.0**
**November 2016**

# CCH Axcess™ Practice

## Welcome to CCH Axcess Practice 2015-5.0

This bulletin provides important information about the 2015-5.0 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

**Edit Invoice Outside of Practice**

To provide even more control and editing capability in your invoices, you can download the invoice to either Word or PDF. Then, you can upload the edited invoice back to Practice, allowing you to view, print, and post the uploaded invoice in Practice. As a best practice, we recommend that you add paragraphs and change invoice format options in Practice before you download the invoice.

- **Download** - When you download the invoice to your editor of choice, either Word or PDF, you are prompted for the invoice date. This date is added to the invoice document and the invoice record in the database. You can edit the invoice and the entire document as desired.
- **Upload** - When you upload the invoice to Practice, the uploaded document is saved in Practice and can be viewed, printed, and posted. Changes made to billing decisions after the upload are not reflected in the invoice document. Upload prompts for the invoice date so that if you changed the date while editing the invoice, you can enter that date. Date changes made on the upload window do not change the invoice date in the invoice itself.
- **Reset** - You can delete the uploaded invoice returning it to the invoice created in Billing. All edits to the invoice made in Practice edit invoice are retained. You will lose edits made outside of Practice.

**Client Dashboard Panes**

To save you time and keystrokes, changes that you make to filters, columns, and sorts in the Client Dashboard panes are saved even after you close. These changes apply to the Work in Progress, Invoices, AR Balance, and AR Open Items panes. This means even as you move from client to client you see the same information without having to reset columns and filters. Changes to the date range are also retained while the Client Dashboard is open.

**Filters on Billing List Windows and AR Entry Windows**

To make it more convenient to review the filters in use, they are now in an expandable section allowing you to see the filters and the grid together. You can quickly determine the number of filters applied by the count shown on the Filters button. The Reset button changes the filters back to the defaults.

**Client Lookup in Daily Entry, Clocks, and Correct WIP**

To improve performance in Time Capture and Correct WIP, the Client Lookup will no longer pre-populate with a list of the 50 most recent clients used. When you Search by Name, Search by ID, or Search by Name or ID, and enter data into the field, you will see the list of clients that match.

## Technical Corrections

This section contains information about issues that are resolved in this release.

**Invoice Paragraph**
Editing a paragraph in an invoice using the formatting buttons no longer places extra characters in the paragraph.