Wolters Kluwer

Release Notes

Release 2016-3.4
April 2017

CCH Axcess™ Practice

Welcome to CCH Axcess Practice 2016-3.4

This bulletin provides important information about the 2016-3.4 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

Projects List to Bill by Project
You can now go to a single place to view unbilled WIP for projects. The Projects list allows you to see any projects that should have been billed, but were missed. In addition to displaying the client and project, the Projects list displays the project status and unbilled WIP for that project. The progress amount shown in the list is the progress billed to the specific project.

- **Columns and Filters** - To save you time and keystrokes, changes that you make to filters, columns, and sorts are saved even after you close Practice. As you move from project to project, you will see the same information without having to reset columns, sorts, and filters.
- **Filters** - You can filter the Projects list by project status, project template, client, and staff assigned to a specific role in the project.
- **Invoices** - The project is linked to the invoice when you bill by project. You can see the project for the invoice in the Invoices list. The project is also in the invoices in progress when you expand a client in the Clients list. Prior Invoices in Billing Decisions and Copy from Prior Invoice in Edit Invoice paragraphs also include the project for the invoice.

Write-Up/Down of Time and Expenses Together
To improve the efficiency of entering billing decisions, you can now write down time and expense transactions together. This feature reduces the time and number of clicks required to bill clients.

Note: If your firm allocates adjustments by hours, when both time and expense transactions are selected, the allocation will be by amount.

Client's AR Balance Shows in the WIP Detail
The client's accounts receivable balance now displays on the Billing Decisions page so that you do not have to open another screen to see the amount.

Accounts Receivable Notifications
To assist with daily receipts and deposits, you can now set a notification that alerts the recipient that payments have been posted. This single notification alerts you when payments are posted in batch.

Billing Notifications
You can now set notifications in Billing to alert you immediately when any of the following occur:

- An invoice has been created for a project that is on hold.
- The status of one or more invoices has changed. This single notification alerts you when invoices are changed in a batch.
- An invoice is saved that causes the write-down amount to exceed the client's preset write-down limit.

- An invoice is saved that causes the client's preset AR limit to be exceeded.
- An invoice causes the client to be billed at a loss.

Get Support Link in Time Capture

You can now get additional product support from within Time Capture. This feature can save you time by providing direct access to Service Excellence support. Click the **Get Support** link in the bottom right corner of the window to do any of the following:

- Submit a support request.
- Chat with one of our Service Excellence personnel.
- Access Hot Topics.
- Read FAQs.

Client Marketing Method

A new field on the Administrative screen of the Client Profile allows you to select how the client was attracted to the firm. You can customize the methods in Client Lists. Client reporting by marketing method will be available in a future release.

Client Responsible Staff - Referring Staff and Prospect Owner

Your firm can now designate one responsible staff type as prospect owner and one responsible staff type as referring staff in Client Lists. A future release will use these designations.

Client Notes - Private Notes

In our ongoing efforts to reduce complexity, the *Private note* option has been disabled for new and existing client notes. Only client notes could be set as private. No other note types, such as tax return, project, and billing notes, are affected.

To keep your existing private note contents, you must re-create them before September 1, 2017. All client private notes will be deleted in a future release. To find and review private notes that may exist for your firm's clients, do the following:

1. In Dashboard, click **Reports Manager** on the Application Links window.
2. Double-click **Firm Library > Firm > Client Notes Report**.
3. Set the *Private field name* filter to equal **Yes**.
4. Set any additional settings for the report, such as a date range.

   Tip: Select **Full** for *Display full notes or summary* to include complete note detail.
5. Select to preview or print the report.

Data Axcess APIs

Data Axcess is a collection of APIs that enable you to programmatically retrieve data within CCH Axcess. The data is centered around Workstream, but also includes Practice and common data. Once an API is consumed and the data retrieved, you can do a variety of things with the data, including but not limited to:

- Creating custom reports that can't be created in the custom report writer.
- Integrating with third-party report writers to create custom reports.
- Integrating with third-party business intelligence platforms to create reports and KPIs.
- Sending data to Excel spreadsheets through .CSV file format.

Data Axcess Utility

The Data Axcess Utility is a program that, upon installation and user authentication, calls available data through the Data Axcess APIs, downloads it, and then extracts it into a local SQL instance. From there, you can run specific queries or connect the SQL database to various tools, such as report writers or business intelligence platforms, among others. The benefits of using Data Axcess include:

- Removing the dependency on a software developer (although some minor technical skills, such as SQL querying, can be helpful).
- Offering automated data retrieval upon installation, with the ability to schedule jobs automatically.
- Having a local SQL instance, which greatly increases the options available for consumption of the data.
- Receiving updated utilities when the updated APIs are released.

To learn more about Data Axcess, contact your sales representative.

Technical Corrections

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

Duplicate Invoice Numbers

An error message now displays when you edit an invoice that has a duplicate invoice number.

Important: If your firm assigns invoice numbers by office, we strongly recommend that you include an office prefix to prevent the creation of duplicate invoice numbers.

$0.00 Invoices No Longer Show as Open

Invoices with an amount of $0.00 no longer show as open in the client dashboard pane, thus preventing the deletion of clients and projects.

Group by Project in Billing Decisions

Projects with the same ID are no longer grouped together in WIP detail. Each project group includes the WIP for that specific project only.

Report Options and Settings Changed

The option to show separate finance charge totals was removed from the Accounts Receivable Aging.