Wolters Kluwer

Release Notes

Release 2016-4.1
July 2017

CCH Axcess™ Practice

Welcome to Practice 2016-4.1

This bulletin provides important information about the 2016-4.1 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

Invoices Ready to Review
To improve the invoice review and approval process, you can now review open invoices in batches without editing each invoice individually. From the Invoices list, set the filters to include the invoices you want to review, and then click **Invoices Ready to Review**. The review process allows you to view each invoice document, along with WIP and invoice recaps, prior invoices for the client, and the WIP billed on the invoice. You also can quickly add a review note and change the invoice status as you examine each invoice.

Progress Bills by Project
When you progress bill a project using the Projects list, the project is associated with the invoice. The progress amount shown in the Projects list is the amount of progress previously billed to the project. When you bill that project, you will see available progress as the sum of progress billed to the project, plus progress billed to the client that is not associated with any project. When progress is applied to the project invoice, the progress associated with the project is applied first, and then progress not associated with any project is applied.

Batch Reprint Final of Invoices
You can now reprint final invoices from the Batch Actions menu on the Invoices list. This addition allows you to select multiple invoices that have been final printed or posted and easily reprint them in batch.

Client Dashboard
Client notes in the Client Dashboard now include notes about contacts assigned to the selected client, allowing you to have a better overall picture of the activity for the client. Both client notes and contact notes can be given a due date, assigned to someone in your firm, and marked complete. A new design allows you to add, delete, and modify notes with fewer steps. You will see three sections of notes:

- **General notes** — Notes without a due date
- **Needs action** — Notes with a due date that are not complete
- **Action completed** — Notes with a due date that are complete

The same notes remain in the client profile and client contact profile, but without the new attributes and layout described above. Changes to the note body, subject, date, category, or staff that are saved while in the Client Dashboard display in the client profile or contact profile. All note changes made in the profiles also display in the Client Dashboard after the client profile is saved. Private notes are only displayed on the client profile.

Refer to Client Dashboard Help for details about user rights, how to add Dashboard panes, and how to work with notes.

Mailing Lists
You can now create mailings lists containing clients and client contact names and addresses. To assign a client or a contact to a mailing list, open the profile, expand **Assignments**, and click **Mailing Lists**. Select the mailing lists for the open client or client contact and click **Save**.

User rights are applied as follows:

- **Administration Manager > Client Manager > Client Profile** — Determines if someone may view or modify the assignments for a particular client.
- **Administration Manager > Client Manager > Client Profile > Contacts** — Determines if someone may view or modify the assignments for a particular client contact.
- **Administration Manager > Firm > Lists** — Determines if a staff may add, delete, or rename mailing lists for your firm.

When you delete a client or a client contact, they are removed from the mailing list.

In a future update, you will be able to export the name, physical address, and email address of the clients or contacts assigned to a mailing list.

Data Axcess APIs
The Data Axcess APIs have been updated. Please see the Data Axcess documentation for more details.

Technical Corrections

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

Export in Time Capture
The export in Time Capture is now WYSIWYG. Only the columns shown in the view are exported.

Override Bill-through Date
In billing, the bill-through date now reverts to the last valid date entered when an invalid date is entered.