

CCH Access™ Practice

Welcome to CCH Access Practice 2016-5.0

This bulletin provides important information about the 2016-5.0 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

Preview Release - Electronic Payments (ePay)

We are excited about a new feature in Practice that will allow your clients to securely pay their invoices online using Client Access. Payment can be made from any of your client's devices. When you have ePay configured in Practice and publish an invoice to your client's portal, your client will see a Pay Now button in Client Access. Clients can click this button to make electronic payments.

The supported electronic payment service providers are CPACHarge, an AffiniPay solution, and Braintree, a PayPal service. After you create a merchant account with one of these payment service providers, you can set up your firm's ePay options, and then add payment links to your invoices and on your clients' portals.

If you are interested in previewing ePay, please open a [support case](#) requesting the ePay preview. Please include the payment service provider you are currently using. If you do not currently license CCH Access™ Portal/Client Access, please contact your sales representative.

Preview Release - Import Payments into Accounts Receivable

To make recording payments quicker and easier, payments can now be imported from a spreadsheet. If you receive a spreadsheet from your bank or other depository account listing payments deposited, you can now import these payments into Accounts Receivable. This reduces both the time spent on manual entry and the chance for errors. The spreadsheet must contain either the ClientID.SubID or the invoice number (or both) along with the payment date and amount. The reference assigned to the payment is imported as the check/reference number for the payment.

If you are interested in previewing the Accounts Receivable import, please open a [support case](#) requesting the AR import preview.

Notification When Maintenance is Complete

You may choose to be notified when server maintenance is complete and CCH Access is available. See [Configuring Notifications](#) for information about how to enable this option for your firm and choose the email addresses to receive the notification. Your recipient choices for CCH Software News are not affected by CCH Access notification settings.

Technical Corrections

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

WIP Transferred from one client to another no longer prevents deletion of client or project

Transferring WIP from one client to another leaves the original WIP as transferred out for an audit trail. This WIP previously was considered active unbilled WIP preventing the client or project from being deleted. This transferred out WIP is now considered historical and will allow deletion.


Invoices list Actions menu

You may have noticed that when the invoices list is filtered to just a few invoices that a portion of the actions menu was hidden and the Edit option was not always visible. With this release you will see Edit in the actions menu when the invoice is not in final or posted status regardless of the number of invoices included in the filtered list.

Posting Finance Charges

Double clicking on the Post button in finance charges will not post duplicate charges.

Feedback Forum

The Feedback icon  on the Practice billing and accounts receivable windows now provides a direct link to the Feedback Forum, where you can enter your ideas for new Practice features. You can also vote on ideas suggested by other users.

Report Corrections

The following corrections have been made for Practice reports:

- The Staff Nonbillable report now properly displays hours in the details.
- The Invoice Realization with Reason Codes report now displays invoice details when grouping the data.
- The AR Register report now displays the date range selected in the report header.
- The Staff Posted Summary report now calculates the business hours correctly for staff without business hours assigned.

Data Access

The following changes have been made for the Data Access APIs and the Data Access Utility:

- Added new APIs for WIPWriteUpDown, InvoiceNote, ARDistribution, and InvoiceSalesTax. For a detailed list of fields included in each API, see the updated documentation at <https://support.cch.com/kb/solution.aspx/000067280>.
- Made changes to the ClientGroup, ServiceCode, WIP, and Invoice APIs. See the updated documentation at <https://support.cch.com/kb/solution.aspx/000067280>.
- Users will now receive a single daily summary of Data Access downloads instead of one email for each API.
- Folder names for downloaded files now include the last updated datetime. This information was removed from the individual files.