

CCH Axxess™ Practice

Welcome to CCH Axxess Practice 2017-3.4

This bulletin provides important information about the 2017-3.4 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

Electronic Payments (ePay)

We are excited about a new feature in Practice that allows your clients to securely pay their invoices online using CCH Axxess™ Portal. When you have ePay configured in Practice and publish an invoice to your client's portal, your clients see a Pay Now button in Portal that allows them to pay online. Payment can be made from any of your client's devices. After your client submits the payment, the payment is written to Accounts Receivable in Practice and distributed to the invoice automatically.

Our supported payment service providers are CPACHarge, an AffiniPay solution (<https://cpacharge.com/>), and Braintree, a PayPal service (<https://www.braintreepayments.com>). Once you have set up your merchant account with one of these providers, you can set up ePay in Firm Settings and Defaults.

Refer to [ePay Help](#) for details about setting up and using ePay.

If you are interested in ePay and do not currently license Portal, please contact your sales representative.

Import Transactions into Accounts Receivable

AR transactions for all entry types can now be imported from a spreadsheet. This import eliminates the need to manually input the payments and other charge and credit entry types. This reduces time spent for manual input and chance for errors. The spreadsheet must contain the ClientID.SubID (or the invoice number or both for payments) along with the transaction date and amount. The reference assigned to the transaction is imported as the check / reference number.

Refer to [Importing Accounts Receivable Transactions Help](#) for more information.

Dashboard Notes

- **Client and contact notes.** The new Client and Contact Notes Assigned to Me pane in Dashboard lists a summary of client and contact notes that might require your attention. Add this pane to your Dashboard to manage due dates, assigned staff, and completion states. Adding and editing notes has the same experience as previously released for [Client Dashboard](#).
- **Tax return and Workstream project notes.** The Dashboard pane that lists tax return or project notes assigned to you is renamed Return and Project Notes. The content and functions of the pane are unchanged.

Note: Refer to [Dashboard Help](#) for details about configuring the layout and content of your Dashboard.

2-Step Verification (a.k.a. Multi-Factor Authentication)

2-step verification is available as an optional setting for firm administrators to configure in **Firm > Settings and Defaults > Login Setup**. 2-step verification applies to the CCH Axxess login mode and not the Active Directory or Federated Services login mode. For more information, see our article and video on [administrators enabling 2-Step Verification for your firm](#).

Important Note: In its initial release, 2-step verification is disabled by default, and the firm must opt-in to enable the option. Based on increased security requests by the various taxing jurisdictions, in the 2017-5.0 release in November 2018, we will change the option default to be enabled, and the firm must opt-out to disable the feature.

Technical Corrections

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

Client Dashboard - Client and Contact Notes

Time stamps and elapsed time on client and contact notes now display in the time zone used on your computer.

Known Issues

This section contains information about issues that are not resolved in this release.

Error: "CCH Axxess has stopped working" when printing or posting invoices in Practice

An issue has been identified with Adobe® Acrobat® DC v2015.006.30417 that is causing the program to crash when printing or posting invoices from the Billing and Invoicing module of Practice. Refer to the [Knowledge Base article](#) describing the problem and workarounds on <https://support.cch.com>.