CCH Axcess™ Practice

Release 2012-3.4.1

May 2013

CCH Axcess Practice Release Bulletin

This bulletin provides important information about the 2012-3.4.1 release of CCH Axcess Practice. Please review this bulletin carefully prior to installation. If you have any questions, please call Account Services at 1-877-977-9PFX (9739) or contact support online at http://support.cch.com/suite.

The following website provides important information about this release:
http://support.cch.com/Suite/ReleaseNotes/

By accessing this site you can view such helpful information as:

- Release Bulletins
- CCH Axcess Support Calendar

Please visit the CCH Axcess Application Status webpage to view in real time the current status of any of our Axcess applications. The Application Status webpage is updated every 15 minutes. Customers may visit at any time, including when support is closed.

NEW IN THIS RELEASE

Integration and Dashboard

- **Client Notes on the Client Dashboard** – Client notes are now available via the Client Dashboard. You can access and create client notes more efficiently using the Notes feature available via the Client Dashboard. This saves you multiple clicks and provides more transparent access to this information without requiring you to launch the Client Profile.

- **Search by Client ID and Sub-ID or Sort Name in Client Manager** – Client Manager now allows you to search for a client by client ID and sub-ID (optional) or by sort name simultaneously. You no longer have to choose a search option. If using both client ID and sub-ID, you can separate the IDs by entering a period between the ID and sub-ID, for example, 14350.01. If you enter the full client ID, client ID.sub-ID (if used), or sort name when you perform the search, the client profile opens automatically.

- **Adding Clients to Access Groups** – Client access groups now contain filters to assist you when searching for staff and clients to add to the group. This saves time and clicks involved when manually searching for and selecting staff and clients.

- **Progress Bill Integration with CCH Axcess Tax** – Invoices created in CCH Axcess Tax now transfer to CCH Axcess Practice. You can create an invoice amount in Tax based on form calculations specified in your Return Configuration Set or enter a flat amount inside of the tax return. Once the interface to CCH Axcess Practice is initiated, you can override either amount. Once you send an invoice from Tax, Practice's Billing Module and Invoice Editor launches. You can then print or email or publish to CCH Axcess Document and Portal or ProSystem *fx* Portal via additional integration points. You can post the invoice and the resulting invoice is stored in Practice.

- **Staff Productivity Key Performance Indicator** – To help you manage your hourly productivity, a Staff Hours Productivity Performance pane is available for your user Dashboard. This pane displays Billable and Nonbillable hours or amounts from a Budget and Actual perspective. The display of hours or amounts depends on your firm setting for Productivity goals. You can see all hours or amounts for comparison for up to a 24 month period. You can view your productivity information in a graph or list view. In the list view, you can view the hour or amount totals, and print or export the data to Microsoft® Excel.

Time Capture

- **Time Capture Navigation and Performance** – For improved navigation and consistency between screens in CCH Axcess Practice and CCH Axcess Workstream, the look and feel of the navigation pane and overall view system is now implemented in the Time Capture module. This new view system will look consistent with the View system you are familiar with in Billing and Workstream, including implementation of Filter, Group By, and Column selection panes in certain areas and views. All of the items listed below reduce clicks needed to perform the Time Capture process from start to finish. Particular items to note:
    - The Navigation Pane now includes Transaction Views and Clocks only.
    - Pre-populated views include Daily Entry, Unreleased Transactions, Ready for Review, Ready to Post, and Posted Transaction views.
    - You can have multiple views open at one time. Each open view (including Clocks and Daily Entry) appears as a tab in the Time Capture window, similar to Workstream and Billing.
    - Ribbons have been reordered for better navigation, and the Reports ribbon that indicated features for "future release" have been removed.
    - The Timesheet Lookup view was removed and will be reintroduced after some navigation updates.
    - Messaging has been improved when updating multiple transactions for Date, Rate, and Staff when the transactions are not all the same status. You now see a new dialog to show the number of transactions updated and the number that were unaffected.
    - For faster transaction posting, you now have a combined Save and Post button on your time entry and clock screens.

- **Clocks Improvements** – You can now launch clocks more quickly from CCH Axcess Tax and CCH Axcess Workstream, even if Practice is not open. This results in fewer clicks to get your clocks started. Other clock items to note:
    - Clock navigation and the start/stop/pause control is improved
    - When you select the user option **Prompt when starting a new clock**, you will see the New Clock screen which allows you to select any appropriate upfront information for the clock. If you click Cancel, close the screen, or press ESC on this dialog, the clock is canceled.

- **Client and Project Lookups** – For improved navigation and to save you clicks, once you choose Name or ID on the Client Lookup, this setting persists across all Practice modules, even after closing a module. The Sort Name column on the Client lookup and Project Name column on the Project Lookup is much wider to facilitate easier searching. Office only shows as a column in the Client Lookup if you have more than once office setup in your account.

Billing and A/R

- **Quick Bill, Progress Bill, and Final Bill Navigation** – Many changes were made to improve the navigation of the Quick Bill, Final Bill, and Progress Bill screens. These navigation changes were made to improve consistency between screens, reduce clicks, and reduce the learning curve associated with the different methods of billing. Items to note include:
    - Field order and field names are consistent for fields that appear on multiple billing screens.

- On the Final Bill with Write Up/Down and Quick Bill screens where you have selected WIP and are billing a specific amount for that WIP, the cursor focus defaults to the **Bill WIP at** field rather than the Write Up/Down WIP field. The entry in the Apply Progress amount field now defaults to $0.00.
- The Quick Bill screen now displays an Apply Progress amount field, saving you clicks when you want to clear all WIP and apply available progress. The Apply Progress amount field defaults to $0.00. The progress available to be applied will display on the screen in the Remaining Progress Amount field, allowing you to enter an amount to apply in the Apply Progress amount field.
- Final Bill - Apply Progress now appears on the billing ribbon, combined with the Batch Apply Progress functionality. It no longer appears on the Detail WIP screen Batch Apply Progress. When a single client is selected, you will see the Final Bill - Apply Progress screen. When two or more clients are selected, you will see the Batch Apply Progress screen. These Apply Progress screens have a default amount in the Apply Progress amount field that equals your Bill WIP at amount; however, you can edit the Apply Progress amount.

- **Invoice Content Manager/Editor Navigation** – To reduce the amount of time required to create an invoice from start to finish, the **Home** ribbon in the Invoice Content Manager now includes Save, Set Status, Print (Edit or Final), and Post options. We also moved the Change Template drop down selection from the Review ribbon to the Home ribbon. Consolidating all of these critical features and options onto the main ribbon in the invoice editor accelerates the rate at which you can complete the process of creating, rviewing, printing, and posting an invoice. You can now post the invoice without printing or emailing.

- **Printing Invoices – Posted or Reversed** – If viewing a Posted or Reversed invoice, you can choose Print Edit, and then subsequently choose to reprint, email, or send to Document or Portal. This eliminates potential additional clicks by removing options that do not provide functionality from the menu.

- **Invoice Date Settings** – We removed the Manual Entry option from Configuration > Firm Settings and Defaults > Practice > Billing Settings. Instead, you can manually change the invoice date when Final Printing your invoice.

  Note: If you previously chose **Manual Entry** as your default Invoice Date setting, the setting now defaults to **System Date**. You can choose to change this to **Bill Through Date.**

Reports

- **Print and Preview Reports –** To speed up the process of previewing and printing reports, you now have the option to Print or Preview reports directly from the Report Options screen in Report Manager. This eliminates clicks and helps you get to your completed report faster.

- **Custom Fields on Reports** – To enable more detailed Custom Client List reports, you can now add custom client fields when you create a custom Client List report in Report Manager. This allows you to further customize the standard report to use these important fields. Similarly, we added additional available fields for the Timesheet Report that can be added in custom reports (service code ID, service code name, client id, client sub id, client name).

- **Report Filters** – The available filters for each report now display alphabetically, making it faster and more efficient when you search for a particular filter. We also improved the speed and time to load on Client Lookup filters, saving you time when you search for a client when generating a report.

- **Billing Worksheets** – The Invoice History section of the Billing Worksheet by Service Code and Billing Worksheet by Project now sorts by Invoice Date. This makes it easier to analyze history from oldest to newest as you are reviewing a client's WIP and billing history. You also now have the option on Billing Worksheets to suppress clients who do not have unbilled WIP.

- **AR Detail Aging** – We added a new option where you can choose to print a summary version of the report with one line per client. This removes unnecessary rows and space from the report, resulting in a shorter report that prints or exports faster.

Technical corrections made with this release include:

Time and Expense Entry

- Employees with Administrator rights can now delete unreleased transactions.
- Flat Fee expenses no longer show an entry of 1 in the rate field on detailed invoices.
- With appropriate permissions, you can post transactions from the Unreleased transactions view when the view is filtered.
- Repeat Last feature for entering a transaction now creates the transaction in the Daily Entry pane, and you can make changes before saving.
- Time Capture notifications now appear on appropriate recipient Dashboards.
- After ProSystem *fx* Tax migrations, client profiles maintain the appropriate bill rate option selections in the client profile.
- When using clocks in CCH Axcess Tax, all necessary CCH Axcess Workstream fields display when the clock is opened.
- When using CCH Axcess Workstream Project and Workstep fields in a clock, error messaging around Planned dates no longer display when the Planned date equals the current date.
- You no longer need to open Practice when using clocks in CCH Axcess Tax.
- Rates populate in the clock when you click Save, even when you choose not to populate the Client information in the clock when you initially start the clock.
- Clocks round hours per firm or user settings.
- Time Capture now responds and opens as appropriate when CCH Axcess Tax Correspondence Manager is also open.

Billing and A/R

- Dollar ($) signs no longer display in hours fields on the detail WIP summary tabs.
- You can create multiple Quick Bill decisions sequentially without issue.
- You can now clear existing progress amounts and create new progress amounts on the same invoice.
- Clients show as active or inactive consistently across billing views.
- The Client Summary view now displays the appropriate progress amount when you reverse a progress invoice.
- $0.00 invoices now generate and can be edited.
- Email addresses now populate the appropriate To: fields when you choose to email invoices; emails do not generate if you do not have a recipient selected in the client profile.
- Resetting the view filter in the Ready for Review view holds the appropriate invoice status to show only those invoices that have not been finalized.
- You can select Correct Staff Assignments on WIP while using the “Active in my office” staff filter.
- If you decide to require projects on time and expense transactions, Correct WIP functions without error.
- Fee Agreements only bill WIP in the specified service code categories, subcategories, or service codes.
- For Accounts Receivable Statements, you can now filter by Client Responsible Staff assignments (for example, partner, bill manager). You can also exclude clients with $0.00 balance, and statements print in the appropriate sort order.