Access Practice SE – Release Note v02.01

What's new

We're excited to release a range of powerful new features and enhancements; all designed to streamline your workflow and make task management more intuitive.

Custom Task Statuses
A dedicated task status field—separate from tags—for clearer, more structured task tracking. Workspace Admins can now create, edit, and delete custom statuses for greater control.

Here's what's changing:
Until now, task status and labels were combined, which offered flexibility but lacked structure. The new status field allows for consistent filtering and more accurate progress tracking across your workspace.

How to configure statuses (Workspace Admins):

- Go to Settings > Statuses in your workspace.
- Create or edit statuses to reflect your workflow.
- Default statuses include: Not started, In progress, and Done.
- Assign unique colours to each status for quick identification.
- Reorder statuses to suit your preferred task flow.
- Rename any status (except Not started and Done, which are fixed).
- Delete statuses not currently in use—you'll be prompted to reassign affected tasks first.

Tags (formerly Labels)
Tags remain a flexible way to organize, filter, and group tasks. They can also be assigned to task templates, so every new task created from a template comes pre-tagged.

Best practices for using tags:
Use tags to mark urgency, service type, task type, or internal processes.
Create color-coded tag groups for easy scanning (e.g., frequency, priority).
Tags display in creation order—reorder by dragging the three-bar icon beside the colour selector and remember to save!
Update your Task Templates
After setting up your statuses and tags, review your saved task templates.
New tasks will now inherit these updated defaults—just like labels previously.

Overdue Status Indicator
A new icon will appear beside the due date of overdue tasks—no more relying on tags to signal overdue work.
Use filters in your To Do list or Work Report to focus on overdue items.

Snoozing or updating the due date clears the indicator. Note: if task milestones are also overdue, they'll need updating as well. The overdue logic currently considers both due dates and internal deadlines (subtasks).

Bulk Task Updates
Select multiple tasks at once and apply bulk changes to statuses, tags, or assignees. Tag updates can append, replace, or reset—giving you more flexibility than ever.

Saved Views
Quickly return to your favourite filters and views—no more bookmarking! You can now create and manage saved views for both clients and tasks.

Pagination Enhancements
Consistent pagination is now live across all Work pages, ensuring smoother navigation and faster performance.

Permissions & Security
To prevent accidental data loss, only Workspace Admins can now delete clients.

Zapier Integration
Zapier lets you connect Access Practice SE with thousands of the most popular apps, so you can automate your work and have more time for what matters most—no code required.

Zapier is a tool that helps you automate repetitive tasks between two or more apps, no code necessary. Customers can use Zapier to move information from one app to another automatically rather than manually. Each Zap you create starts with a trigger (something that happens in one app) and then one or more actions (something else that happens in another app). Access Practice SE is now published on the Zapier Apps.

Supported triggers and actions
Zapier helps you create workflows that connect your apps to automate repetitive tasks. A trigger is an event that starts a workflow, and an action is an event a Zap performs.

Triggers:

- Task Assigned
- Task Started
- Task Finished
- Client Created/Updated
- Contact Created/Updated

Actions:

- Find Client
- Add/Update Contact or Client
- Create/Update Client
- Start Task
- Add Recurring Task to Client

See Access Practice SE Integrations | Connect Your Apps with Zapier to learn more.

When will this version be made available

This version will be released for all users on 4 July 2025