Access Accountants Evo

Access Accountants Evo combines next generation AI with proven compliance and practice management to solve challenges faced by accounting firms today.

Access Practice Management 2025.07 Release Update

Version 2025.07 released 8 September 2025

Streamline your invoice process and get paid faster with our completely redesigned workflow that reduces clicks, eliminates errors, and gives you better control over your billing process.

Please note, Access Practice Management comes in two editions – Standard and Professional (Pro). Invoicing features will not apply to the Standard edition.

Please refer to the configuration guide and the configuration steps required to configure and enable the new features outlined below.

Key Features

Revamped Invoicing Experience

We've completely redesigned the invoicing workflow to make billing faster and more intuitive:

- **Multi-Location Invoice Creation:** Create invoices directly from job pages, client pages, or client group pages for maximum flexibility
- Multi-Job Invoicing: Add multiple jobs to a single invoice simultaneously, saving time on complex billing scenarios
- **Enhanced Time and Disbursement Allocation:** Allocate time entries and disbursements from job tasks to invoices from a single, centralized location, Eliminates the need to jump between multiple screens
- **Invoice Details Enhancement:** New Allocations and Narrations tabs provide comprehensive visibility of all invoice-related information in one centralized location
- **Support for Debtor Jobs:** Seamlessly create invoices when clients have debtor job relationships

Comprehensive Debtor Management

Debtor management capabilities have been introduced to streamline complex billing relationships:

- **Debtor Assignment:** Store debtor relationships against client records, with clients defaulting to themselves as the debtor
- **Debtor Integration:** Debtor information is automatically populated throughout the jobs and invoicing interface

- **Debtor Overview:** View all debtor groups with comprehensive lists of associated clients
- **Transaction Visibility:** See all transactions for debtors including invoices, adjustments, credit notes, write-offs and receipts
- **Job Management**: Display all jobs relevant to a debtor, including jobs for the debtor itself and any clients they represent

Invoice Narration Improvements

Enhanced tools for creating professional, customized invoice descriptions:

- **Line-Item Customization:** Edit descriptions for individual line items during the invoice creation process
- **Flexible Line Items:** Add new line items to invoices for additional charges or custom narrations

Timesheet Enhancements

- **Customizable Time Units:** Configure timesheet duration units to align with your practice's specific timekeeping standards, moving beyond fixed 6-minute increments
- **Enhanced Job Integration**: Job detail pages can be configured to include springboarding buttons for seamless integration with Tax and Ledger applications

Enhancements

Template Modernization

- **Professional Invoice Template:** Updated invoice template with a clean, modern design that presents a professional image to your clients
- **Enhanced Debtor Statements:** Refreshed debtor statement template with improved layout and professional appearance

Job Management

- **Unique Job Titles:** Job titles are now unique to each client, making it easier to identify and manage individual jobs across your practice

Documentation Updates

Comprehensive updates to Admin and User Guides covering all new functionality to help you make the most of these enhancements.