APM 2025.08 Release Notes

Access Practice Management 2025.08 Release Notes

Thank you for choosing Access Accountants to power your practice.

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

We would like to inform you of an upcoming product update and maintenance window for Access Practice Management.

When:18 February 2026 from 8:00pm to 11:00pm AEDT

During this time, we will be performing maintenance and applying an update to Access Practice Management. There is no downtime associated with this update, however, please inform the users in your practice of this scheduled update so they are prepared should anything unforeseen occur.

Configuration: Please refer to the configuration guide APM 2025.08 Config Instructions for configuration steps required to configure and enable the new features outlined below. Enablement of features will also depend on the package you have purchased. Time & Billing features are available in Access Practice Management (Pro) version only.

Key Features

Batch Invoicing Workflow

Save significant time with our new batch invoicing capabilities:

- **Multi-Debtor Selection**: Select multiple debtors to invoice simultaneously from a centralized interface
- **Streamlined Invoice Generation**: Cycle through the invoice creation process for each selected debtor with allocation and narration controls
- **Invoice Summary View**: Review all created invoices in a consolidated summary

Role-Based Dashboards

Personalized dashboards tailored to different roles in your practice:

Staff Dashboard

- View all assigned jobs and deadlines in a task-focused interface
- Priority indicators for efficient workload management
- Quick access to client files and documents
- Progress tracking with visual indicators
- Integrated time tracking options

Manager Dashboard

- Job assignments and progress tracking across team members
- Team capacity indicators showing workload distribution
- Workflow bottleneck alerts for proactive management
- Upcoming deadline visibility organized by urgency
- Team productivity metrics and performance comparisons

Partner Dashboard

- Engagement letter expiry alerts (60-day warning)
- High-level client metrics across your portfolio
- Quick access to pending approvals
- Team performance indicators and capacity utilization
- Revenue and billing summaries by client group

Dashboard Configuration

- Set dashboard type on employee records with options for Default, Partner, Manager, or Staff dashboards.

Enhanced Invoice Allocations

Powerful new capabilities for managing invoice allocations:

- **Allocate by Timesheet Entry**: Gain fine-grained control by allocating individual timesheet entries to invoices, allowing you to select exactly what time gets billed
- **WIP Allocations on Job Pages**: View all WIP allocations directly on job pages to easily track which invoices each job belongs to

Invoice GST Calculation

Redesigned GST calculation architecture to ensure accuracy:

- **Invoice-Level GST Calculation**: GST is now calculated at the invoice level based on GST-inclusive WIP allocations
- **GST Adjustment on Invoices**: New GST Adjustment field on invoices allows manual correction of calculated GST values when needed

- **Improved Accuracy**: Eliminates rounding discrepancies that previously could lead to invoices to show incorrect GST amounts

Professional Invoice Presentation

- **ABN Display**: Your practice's ABN now appears on invoices to meet compliance requirements
- **Liability Disclaimer**: Add and display liability disclaimers on invoices
- **Enhanced Narration Formatting**: Support for multiple paragraphs in invoice narrations with proper spacing, plus improved horizontal space usage for better readability
- **Edit Invoice Narrations**: Edit invoice narrations after invoice generation for greater flexibility in finalizing invoice details

Enhanced Invoice and Debtor Statement Templates

Greater control over how your documents appear to clients:

- **Flexible Practice Address Display**: New checkbox in Practice Details > Invoicing section to show or hide your practice address on invoices and debtor statements
- **Client Phone Number Control**: New checkbox to show or hide client phone numbers on invoices and statements
- **Optimized Letterhead Display**: When practice address is hidden, your letterhead logo can fill the full page width (without stretching logos smaller than page width) for a more professional appearance

Invoice Schedule Functionality

Scheduled invoices for recurring work:

- **Create and manage invoice schedules** when creating new jobs
- **Add schedules to existing jobs**: Apply invoice schedules to jobs after creation
- **Invoice date flexibility**: Change invoice dates after schedule creation as needed

User Feedback Integration

- **Wootric Survey Integration**: Built-in survey capabilities to gather user feedback directly within Access Practice Management
- Survey component added to utility bar alongside Analytics
- ~~Triggered based on conditions configured in Wootric admin~~
- Your feedback helps us continuously improve Access Practice Management

Activity Tracking

- **Bulk Invoice Email Activity Events**: Automatically create activity records when bulk invoice emails are sent, improving audit trail and client communication tracking

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Enhancements

Invoice Display

- **Job count on invoice records**: High-level understanding of invoice scope through accurate job count display
- **Narration consistency**: Regardless of allocation view (Employee or Task), narration page displays as line items per job for consistency
- **Invoice amount flexibility**: Enable $0 invoice amounts for write-off scenarios and allow invoice amount changes on allocations page

Invoice Allocation Improvements

- **Auto-allocation for disbursements**: When invoice amount is less than total disbursement amount, system automatically reduces last disbursement allocation to fit within invoice balance, preventing unallocated amount errors

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Bug Fixes

Invoice Display and Creation

- Resolved invoice display issues where pre-migration disbursements were showing alongside new invoice items
- Fixed $0 invoice creation issue that occurred when clicking Employee or Task radio buttons during invoice creation flow
- Corrected invoice allocations screen calculations across different view modes (by Job, by Employee, by Task)
- Fixed ad hoc invoice creation to properly generate WIP allocations and narrations for invoices created on clients without existing jobs

Invoice Narrations and Details

- Fixed default narration text to properly display "Client Name - Job Description" for allocations and "Disbursements as incurred" for disbursements
- Fixed client reference display in Remittance Advice section to show client reference instead of client name

Invoice Processing

- Fixed timesheet entry value changes that would allow timesheet entry changes after creating invoices

- Resolved invoice preparation errors that prevented users from completing invoice creation in certain scenarios

Activity Tracking

- Corrected activity event creation for bulk invoice emails to create single Email Message activity entries instead of doubled-up Event entries

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Should you have any questions or issues, please contact our Customer Support team by logging a case via our Customer Success Portal.