THOMSON REUTERS

AdvanceFlow, v.12.0
User Bulletin 8473: Update

May 18, 2017

This user bulletin describes enhancements made with this update of AdvanceFlow™.

ENHANCEMENTS

Fund accounting features

AdvanceFlow now provides Fund accounting features to help you accommodate the unique requirements of clients such as non-profit organizations and government agencies.

- To support and facilitate your firm's workflow for fund engagements, you can create and implement one or more fund templates in the AdvanceFlow Administration workspace. Firm staff members will then be able to access a template to quickly apply the fund accounting structure to new and existing engagements.
- You can organize the funds within templates into sets that you can then use to generate an Account Grouping - Fund Set report for an engagement.
- You can also view fund balances for an engagement by creating a Fund Balance report.

Checkpoint Engage

- You can now email Checkpoint Engage™ documents as PDF files.
- You can now navigate from one Checkpoint Engage document to another via embedded links.

CHANGES

Add-Ins

AdvanceFlow Client Add-In v.12.0 is now available. Install the new version to ensure that all AdvanceFlow Add-In related features are up-to-date.

Workpapers

Prior to this update, some filtering options for Subsidiary clients in the Workpapers tab were inadvertently hidden. We have resolved this issue.

Known issue

AdvanceFlow miscalculates prior-year balances when you copy them from an existing engagement. We are working to resolve this issue.

HELP & SUPPORT

Help & How-To Center

For answers to questions on using AdvanceFlow, access the Help & How-To Center by clicking the **Help** link in the AdvanceFlow menu and selecting a topic. You can also use the field at the top of the Help menu to search for topics. For more information, including sample searches, see Finding answers in the Help & How-To Center.

Product support

You can email our Support team at advanceflowsupport@thomsonreuters.com. You can also complete a form and send a question to our Support team on the Support Contact Information page of our website. To leave a message and receive a call back from a Support representative, call (800) 968-0600, press **1** for Product Support, press **4** for Accounting and Auditing, and then press **4** for AdvanceFlow. A representative will follow up with you shortly. For additional details (including extended support hours for tax season and hours for other applications), visit the Support section of our website.

Website resources

Visit our website to access the Tax & Accounting Community, to learn about training courses, to view blogs and articles, and more.