THOMSON REUTERS

AdvanceFlow, v.2017.3
User Bulletin 8490: Update

August 24, 2017

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

ENHANCEMENTS

Application version numbering

With this update, we've implemented a year-specific application version numbering system for AdvanceFlow, beginning with v.2017.3. This format change isn't related to specific application changes.

Fund templates

- You can copy fund templates.
- You can import fund data from a spreadsheet or from an existing engagement for use as a fund template.

Reports

- When you create an Account Grouping report or a Custom Excel report, you can now group by funds. In the final report, you have the option to combine fund information or to have separate sheets for individual funds from multiple fund sets.
- In the Administration > Security area, you can now assign permissions for individual AdvanceFlow reports.
  Note: Any permissions that you assign for a report will apply at the user level and at the system level.
- In the Administration > Reports area, we've updated the Roles List report to display data in a more readable format.

Add-Ins

AdvanceFlow Client Add-In v.17.3 is now available. Install the new version to create an amount or formula in an Excel workpaper using your firm's fund sets and to ensure that all features related to the AdvanceFlow Add-In are up to date.

Checkpoint Engage

- You can now incorporate Checkpoint Engage documents within templates.
- You can now configure AdvanceFlow to include or exclude practical considerations when sending workpapers to PDF files or when exporting engagements as PDF files. To do so, click your name in the AdvanceFlow menu, choose Preferences, click the Checkpoint Engage tab, and mark the checkboxes to set your preferences.

Workpapers

You can now include signoffs when adding workpapers from an existing engagement by marking a checkbox in the Add Workpaper dialog. AdvanceFlow will indicate any included signoffs in the Signoffs tab and in the History tab of the Workpaper Properties dialog.

CHANGES

We've resolved the following issues.

- You can once again email workpapers from within AdvanceFlow by right-clicking a workpaper and choosing Email > Outlook.
- We've addressed an issue in which, in certain instances, prior-year journal entries were not affecting the trial balance.
- We've corrected inaccuracies in the leap-year calculations that AdvanceFlow makes during the roll-forward process.
- You can create PDFs of engagements without issue.
- When you create reports for divisional engagements, the *Include multi sheets* checkbox is now visible in the Report Options dialog.
- When you add a formula to a custom Excel workpaper in a Fund engagement, the Add Formula dialog now displays all of the information.

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.