



December 14, 2017

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

## ENHANCEMENTS

### Desktop integration

To ensure smooth integration between AdvanceFlow and other applications such as PPC's SMART Practice Aids, download and install the latest version of [Silverlight Trusted Mode](#).

1. In AdvanceFlow, click the Administration button in the navigation pane and click the Downloads button.
2. Click the Miscellaneous tab in the workspace and then click the **Download** link for Silverlight Trusted Mode.
3. Save the installation file to your computer, navigate to the save location, right-click the AdvanceFlowTrustedModeConfiguration.exe file and choose **Run as administrator**.

**Important!** You must download the installation file and run it as an administrator to ensure the proper functioning of AdvanceFlow integration features.

4. Click Ok when notified that the installation is complete.

### Add-Ins

With this update, we're providing two versions of the latest AdvanceFlow Client Add-In to address issues related to Microsoft Excel. Use the following information to determine which version applies for your firm and install only that version of the Add-In.

- **AdvanceFlow Client Add-In v.17.4:** [Install this version](#) to improve performance when cycling through Microsoft® Excel documents.
- **AdvanceFlow Client Add-In v.17.4.1:** As part of a recent update, Microsoft Excel 2016 returns a null value when auto-recalculating a protected document. In addition to addressing the same issue as the v.17.4 Client Add-In, this version of the Add-In ensures the correct auto-recalculating behavior for Excel 2016 users in AdvanceFlow. If your firm uses Excel 2016 with AdvanceFlow, [install this version](#).

### Checkpoint Engage

- When you roll forward, copy, or import Checkpoint Engage™ folders, AdvanceFlow merges any pre-existing folders from the same engagement with the new folders to avoid creating duplicates.
- You can roll forward a Checkpoint Engage master engagement template. For more information, see the Checkpoint Engage help.
- You can access Checkpoint Engage Guide Me features from within AdvanceFlow by clicking the Guide Me button in the ribbon of the Trial Balance tab.
- All roll-forward options in AdvanceFlow are now synchronized with Checkpoint Engage virtual documents.
- Checkpoint Engage now features **Exclude**, **Include**, and **New without responses** options for physical documents.

## Reports

You can save a copy of a report to a PDF file from the generate report screen.

## Notes

You can [edit notes](#) by right-clicking a note in the Notes List tab and choosing Edit. (*AdvanceFlow Ideas Community #59*)

## Administration

- To help you expedite the tax code setup process at the beginning of a new year, AdvanceFlow allows you to [import](#) or [copy](#) tax subcodes for the same engagement from previous years.
- You can enable or disable the ability to email workpapers from within AdvanceFlow using [AdvanceFlow security features](#).

## Engagements

- You can [assign staff to an engagement](#) and then set up alerts related to various events.
- For consolidated engagements, you now have the option to force a recalculation of prior-year balances for subsidiaries during the consolidation process.

## CHANGES

We've resolved the following issues.

- When you create an engagement from a template, the roll forward option is now displayed correctly for all forms.
- You can create an engagement using a Checkpoint Engage template without issues.
- When creating Fund masks, AdvanceFlow now correctly recognizes "C" characters in multiple locations.
- When you start to enter an account number in Journal Entry screen, AdvanceFlow automatically fills in the remaining text without 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](mailto: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.