



March 23, 2018

This user bulletin describes changes made to this release of AdvanceFlow.™

ENHANCEMENTS

If you have appropriate permissions, you can now [lock areas of an engagement](#) using the Section Lock feature in the Engagement Properties dialog. This may be useful when preparing an engagement for finalization to prevent any further updates.

For example, to prevent additional changes to notes for an engagement, right-click the engagement in the AdvanceFlow navigation pane, choose Properties, click the Security tab, mark the Notes List checkbox, and click OK. If you navigate to the Notes List tab in the workspace for the selected engagement, you'll see that the Edit, Reply, and Delete buttons in the ribbon are now disabled. (Users will still be able to view notes that are locked).

CHANGES

Resolved issues

With this update, we've resolved the following issues.

- You were unable to access 2017 tax code information in the Administration > Tax Codes screen.
- AdvanceFlow displayed an error when you attempted to export an AdvanceFlow trial balance to ProSystem fx®.
- You were unable to filter items listed in the Journal Entries workspace.
- You were unable to change the status of notes from Cleared to Open.
- The roll-forward process was not completing for some users.

Add-Ins

- Updated AdvanceFlow Client Add-Ins are now available. [Install the new version](#) to ensure that all AdvanceFlow Add-In related features are up-to-date.
- We resolved an issue where the "MMM" date format variable didn't display correctly.

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 and email subscriptions

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