



August 10, 2018

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

CHANGES

Multi-factor authentication

In addition to the current application login requirements, Thomson Reuters can now offer even more advanced security options if your firm wants multi-factor authentication for AdvanceFlow.

You can now use Thomson Reuters Authenticator, our multi-factor mobile app to help your firm meet all three industry standard factors of authentication:

- Something you know – You know your login and password
- Something you have – You have your smartphone, tablet, Apple® watch or other device
- Something you are – If you have Touch ID, you are your fingerprint

We strongly advise that you enable multi-factor authentication to strengthen the security of both your firm and your clients' data – and we'll be there to support you every step of the way.

Depending on your business security needs, you can [make multi-factor authentication mandatory or optional for your staff](#). If you make it mandatory, all staff must use this additional authentication method; if you make it optional, individual staff members can choose to opt in to multi-factor authentication and administrators can configure multi-factor authentication features for specific users or groups.

The requirements for multi-factor authentication are simply an internet connection, a mobile device, and the Thomson Reuters Authenticator app. For more detailed information about multi-factor authentication setup, please see the [AdvanceFlow multi-factor authentication overview](#) in the Help & How-To Center.

More information about security

Visit our security page at Tax.TR.com/Security to learn more about security and how Thomson Reuters protects you and your clients.

GoFileRoom Client Add-In (required)

We've released GoFileRoom Client Add-in v.18.0.4 to address browser security and integration changes. Because you'll need the latest version of the Add-In to access GoFileRoom through AdvanceFlow, we've made the updated Add-In available via a link in the [Pre-update release of Client Add-In version 18.0.4](#) article.

Additional changes

- You can now [lock individual folders](#) in an engagement.
- When you [export trial balance data](#), you can now group file details by subcode.
- In Checkpoint Tools, the roll forward option, **Replace from Checkpoint Tools**, is now named **New, without responses**.
- The current tax year displays correctly in the **Tax Year** field of the Administration > Tax Codes screen when the time zone setting on your computer is set to Mountain Time.
- You can now access reports for engagements that were rolled forward and then deleted.

- We've removed the Checkpoint Engage import button that appeared in the ribbon of the Workpapers tab for users of PPC Checkpoint Tools. To import a PPC Checkpoint tools engagement, click the **Import an existing engagement from PPC's SMART Practice Aids** option in the Setup screen when you enable Checkpoint Engage.
- Users can no longer import to the Account Classification account grouping, as expected.
- Tax codes or secondary account grouping codes that you assign to an account are no longer changed when you assign an account classification code.
- When you export an Excel document to PDF, AdvanceFlow no longer removes text in cells that are set to merge and wrap text.
- AdvanceFlow no longer shows an error message when assigning account classification codes that were set up in the Administration > Account Groupings > Mappings tab and also included special characters.

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.