What's New in BankLink Practice 2010?

Clients page

- The **New Accounts** link now indicates how many new accounts have been downloaded
- If there are unattached accounts an **Unattached Accounts** link is displayed indicating the number of unattached accounts - click the link to go to the **Setup New Accounts** window where you can attach the accounts to client files

System Bank Accounts

- New layout to make it easier to see bank accounts with additional detail
  - **Client Code** and **Client Name** columns allow you to identify what client file a bank account is attached to
  - A **Charge** column lets you identify which bank accounts do not export the charge to your practice management system
  - Bank accounts belonging to BankLink Books Secure clients have been added along with a **Secure Code** column to show which bank accounts belong to which BankLink Books Secure client
  - An **Institution** column shows which institution each bank account belongs to
  - An **Inactive** column exists to identify bank accounts no longer delivered data by The BankLink Service
- Link directly to the **Setup New Accounts** window
- Automatically email BankLink Client Services a delete request
- Perform selected tasks on multiple bank accounts
- Use a filter to display the bank accounts you need to se
- A search facility has been added - just type part of the bank account number, bank account name client code or client file name
- You can choose which columns to display and in what order
- You can sort by all columns either ascending or descending
- Print the current view of the **Maintain Bank Accounts in Admin System** window

Import Third Party Authority Forms

- Can now import an Excel file containing multiple clients' details to pre-fill the required authority forms. This will save time if:
  - You are a new practice to BankLink
  - A new institution comes on board
  - A practice merger or split occurs
  - An additional partner needs to add their clients on

Emails

- Full colour palette to set branding colours for fonts and backgrounds in
  - Practice default email signature
  - All emails sent from BankLink Practice
- Added **Date** and **Time** to the merge fields
- Extra options have been added to the toolbar. You can:
  - Delete selected text
  - Undo typing

Custom Documents

- Can create custom documents to:
  - Produce at client level from Favourites either by itself or with other custom documents and/or reports
  - Include with Scheduled Reporting at System level
  - Include with Scheduled Reporting on a client by client basis

Reports

- Coding Optimisation Report available from the System Reports shows how transactions have been coded within the client files
- List Payees
  - Can produce in name order or number order
  - Can rule a line between payees
- Report Header/Footer changes
  - Header can appear on first page only
  - First page header can be different from remaining pages

    - Footer can appear on the last page only
    - Last page footer can be different from previous pages

Coding

- Use **Find and Replace** to recode transactions from one code to another

Chart Mapping

- Convert a client file from one set of chart of account codes to another

BankLink Books

- Choose whether to allow Books clients to edit memorisations
- Desktop shortcut is added automatically when BankLink Books is installed

Interfaces

- MYOB Accounting
    - A new import allows transactions to be imported using the General Journal import