

## Dear Client

### AcuSoft HelpDesk

After much investigation we have finally narrowed this down to Zendesk. It is a simple tracking system that should allow us to keep better track of our outstanding items and give you a better overview of what has been asked by your colleagues.

Anyone will be able to send an email to [support@acusoft.zendesk.com](mailto:support@acusoft.zendesk.com) on the first email sent to this address they will be asked to confirm their email account by clicking on a link in the email they receive back. Once this is done they will be added to the Helpdesk, added to your organisation and their issue will be raised. After that any issue will be automatically raised.

Once the ticket is in the system all other users in your organisation will be able to see and comment on them, this will allow you to self help if possible but will also cover other user tickets through vacation and illness.

So when you get your next real request please send it to the above email. Although we have allowed any user to use this helpdesk, can we ask that you send an email to all your users asking them to direct all requests through one or two colleagues, rather than sending them directly to Zendesk as a sort of 2 eyes approach.

## **Changes**

### **FATCA**

We have developed a reporting solution to help you identify people who you may have to report on as well as the ability to record this on the contacts screen. Once set you can see and filter on the fields within the Contacts Search option.

We do not believe this is a total solution, especially as the “powers to be” have not yet ratified the requirements but this should provide a solid starting point.

Attached is an overview of this additional functionality

### **Foundations**

Following the introduction of these special structures, we now offer a foundations module. This module allows you to use both profit and loss and capital and income ledger postings, tailors the screens available to show only the relevant sections for Foundations and adds an additional report as well as changing the database summary to give you only Foundation specific information.

Attached is an overview of this additional module

## AcuWIP (Time Recording)

We have been working on a new Time recording module, which will eventually encompass all of our current functions that relate to Work in progress into one application. This has been several months in development and moves us into a new direction regarding user interface and functionality.

At the moment this will cover, User Time recording, Amend WIP, Approve WIP (for those with this module), Transfer WIP, Time Clocks

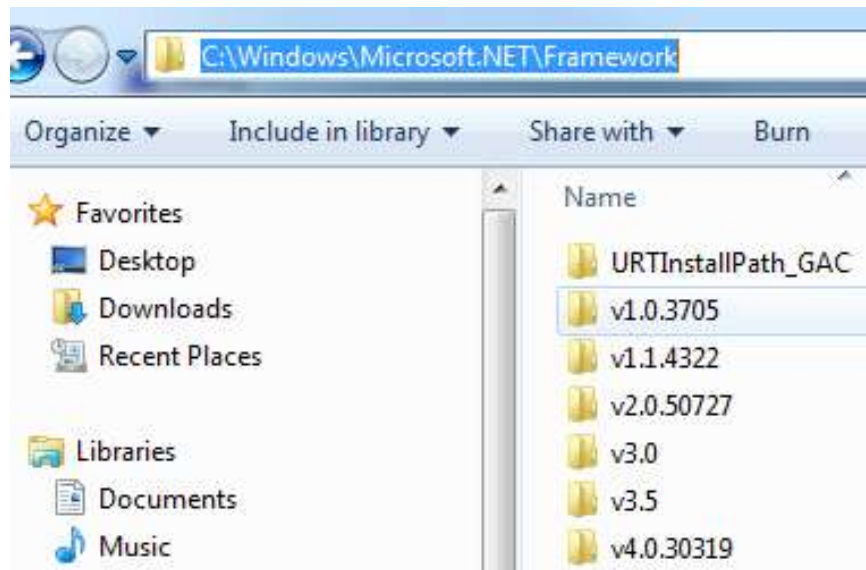
Some of the additional functionality includes

- Multi day input for holidays, sick and training
- Activity code filtering i.e. will only get Fixed activity codes when posting to a fixed client rather than all
- Post both Time and Disbursements in the same screen / batch
- Statistics/breakdown on your daily input
- Ability to view previous days input

This new application can be rolled out to specific individuals rather than an entire site; this will help provide a more gradual rollout and allows us to pick up any site specific issues on a smaller impact basis.

Attached is an overview of this new application

In order to use this new application and any future applications that we are planning working you will need to ensure that you users PC or Terminal servers have the Microsoft Dot Net Framework installed with the version 4.0.30319. This can be check by using Windows Explorer and navigating to the folder C:\Windows\Microsoft.NET\Framework and you see the version you have installed eg



## **Information**

### **Work in Progress**

We have recently been asked to clear down a client's Work in Progress table removing all data which was older than 1<sup>st</sup> January 2006. We are happy to run this on any site as this will make the Work in Progress run more efficiently and decrease the overall size of the database. Anyone wanting to do this, please email us to discuss this further.

### **Training**

With time and staff turnover, sometimes the level of knowledge within your organization can fall until you find that staff are only using the basic functionality of the system. Why not schedule some training to help improve the output, quality and usage of the system? We train groups of up to 5 staff in sessions from 1 to 2 hours long depending on the section of Acumen/AcuFund/AcuPen/AcuReview.

## I Didn't Know That....

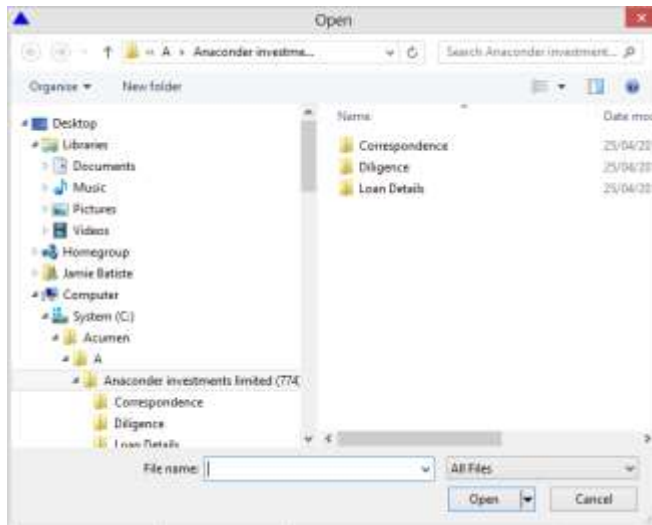
Filing can be awkward. Why not centralize your recording of client correspondence, diligence and other communications within Acumen.

You can set up standard folders to hold specific information simply by populating the System Control File (Special – System Control File)

The highlighted section will allow you to create a specific folders structure.

| User Defined Titles |                  |                 |                              |                             |
|---------------------|------------------|-----------------|------------------------------|-----------------------------|
| Key                 | Database         | Contact         | Create Extra Contact Folders | Create Extra Entity Folders |
| 1                   | Annual Review    | Deceased        | Diligence                    | Billing Narrative           |
| 2                   | Entity Type      | In Probate      | Correspondence               |                             |
| 3                   | Company Services | Requires Copies | Loan Details                 |                             |
| 4                   | Disb...          | De Mat Contact  |                              |                             |

Then from the Contacts screen (Modules – Contacts – New/Amend Contacts) select “Goto Contacts Folder” or from the Modules - Goto Correspondence for an entity.



The folders are created automatically when you open this dialogue. Documents will open direct from Acumen.

Please note this feature requires a path or server location set – please contact us if you have issues or a warning pops up when using this.