



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 see
- 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 sort by all columns either ascending or descending
- Print the current view of the Maintain Bank Accounts in Admin System window

Bulk Client Authority Form Import

- Can now import an Excel file containing multiple client's 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

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

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
 - 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

Interfaces

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

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

BankLink Books

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

Superfund Processing

- Supercorp SuperVisor II
 - The Member ID appears as a drop down list in the Superfund Details window accessed by pressing the Super button when coding
- MYOB Superfund
 - The Member ID appears as a drop down list in the Superfund Details window accessed by pressing the Super button when coding
- New SuperCorp Supermate Super fund BankLink Interface
- MYOB Superfund renamed to SuperCorp Superfund
- New RewardSuper Interface
- New ProSuper Interface
- BGL Bulk Extract (by request)
- Praemium Bulk Extract (by request)

GST

- Rate 16.443 has been added to selectable list in the Fuel Tax worksheet