

Released August 2023.

Enhancements

- **Custom Worksheet - Added functionality to create custom Worksheet Copy.**
User choice to be applied to:
 - Individual Tax Returns (IITR) all years
 - Partnership (PTR), Trust (TRT), Company (CTR) and Self-Managed Super fund (SMSF) - all years
- **Defined Search options – Added separated search criteria on the main listing screen:**
 - Search All
 - Search by TFN
 - Search by Name
 - Search by Client Ref
 - Search by ABN
 - Search by Phone number
- **Status Changed field – introduced into the Tax Form Details view which tracks the last date when a tax return Status is changed. Additionally available as:**
 - Main client list screen column picker.
 - Return Report Builder column picker.
- **Rental Schedule & Foreign Property Worksheet - Rental expense descriptions can be manually entered.**
- **Updated the ATO validation rules to allow Small Business Boost tax returns to be lodged.**

Minor Defects

- **Resolved the issue where the Practice subscription had expired but still allowed Users to access but could not use the application correctly.**
- **Updated non individual organisation name to allow square bracket and grave accent symbols. As per ATO criteria**
- **Addressed the issue where Occupation and Industry code wasn't syncing with Access Practice Management.**
- **Address an issue when Private Client tax returns were opened via Access Practice Management by another user, it would display and error. 'Failed to Open Tax Return'. A more informative message will be displayed.**

Security

- **Continuous Security updates applied.**