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	HEADER		
	ICAEW Technical Accreditation Scheme "Client Communication" Software Evaluation		
			
	Date completed: 21st August 2024		
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1.	<u>INTRODUCTION AND PROLOGUE</u>		
Introduction			
1.01	The suitability of software for each particular user will always be dependent upon that user's individual requirements. These requirements should therefore always be fully considered before software is acquired. The quality of the software developers or suppliers should also be considered at the onset.		
1.02	Fundamentally, good software should: 1. Be capable of supporting the functions for which it was designed. 2. Provide facilities to ensure the completeness, accuracy, confidentiality and continued integrity of these functions. 3. Be effectively supported and maintained. It is also desirable that good software should: 5. Be easy to learn, understand and operate. 5. Make best practical use of available resources. 6. Accommodate limited changes to reflect specific user requirements. It is essential, when software is implemented, for appropriate support and training to be available.		
Approach to Evaluation			
1.03	The objective is to evaluate a product against a set of criteria developed by the ICAEW to ensure that the software meets the requirements of Good Accounting Software, as laid down in the summary.		
1.04	In order to effectively evaluate the software, a product specialist from the vendor completed the detailed questionnaire and provided it to the ICAEW to examine. The ICAEW's Scheme Technical Manager then reviewed the operation of the various aspects of the software assisted by a member of the vendor's technical staff and checked the answers to confirm their validity. The questions were individually reviewed and commented on and the majority of assessments were confirmed.		
1.05	The Technical Manager discussed the assessment with a member of the vendor's staff in order to clarify any points requiring further information. In the event of disagreement between the supplier and the Technical Manager, the Technical Manager's decision was taken as final and the response changed accordingly.		
1.06	The latest version of the software was used throughout the evaluation.		
1.07	When the evaluation had been completed, a draft copy was sent to the ICAEW Scheme Manager for review before completion of the final report.		
Prologue: Matters to consider before purchase			
1.08	General Overview:	ClientWindow is a platform which seamlessly integrates messaging apps, such as WhatsApp, with a central platform and business email. This means clients can use the messaging app they prefer, such as WhatsApp, whilst business teams continue to use their business email. This allows everyone to use their preferred communications channel without compromising on management oversight and meeting data security regulations, whilst also providing clients with a fast, personal service.	
1.09	Supplier background:	ClientWindow was launched in 2023. The platform was originally designed and launched by Chartered Accountants, David Moehle and Tim Zeale, who are both partners at Jersey based Chartered Accountancy practice, PKF bba. They had recognised the accountants have with communicating with their clients, especially when WhatsApp is involved.	

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1.10	Product background and suitability for the user:	<p>Created specifically with accountants in mind, ClientWindow will help them provide excellent services to their clients.</p> <p>Clients want to use their preferred messaging app, such as WhatsApp. However, this creates management challenges for accountancy firms as messages are easily siloed on personal devices. ClientWindow solves these challenges:</p> <ul style="list-style-type: none"> - Clients can message using WhatsApp, whilst accountants use their business email as normal. - Help firms manage client conversations more efficiently and effectively with team-wide visibility and proper management oversight. - Centralise communications so client messages are not sent to personal devices. <p>ClientWindow has special features developed for accountants:</p> <ul style="list-style-type: none"> - Automatically integrate messaging app conversations on WhatsApp and other chat platforms with internal communication software, including email. - Easy invoice and receipts capture as clients can send their invoices and receipts via WhatsApp. - ClientWindow automatically sends WhatsApp attachments to Dext, AutoEntry and Hubdoc. - Automated Information Requests with access to editable online questionnaires that your clients can complete such as for tax self-assessment, tax returns and even onboarding and survey forms. - All conversations are stored securely for effective e-discovery and record keeping. 	
1.11	Add-on modules:	None but different plans offering different features available	
1.12	Typical implementation [size]:	ClientWindow is available for firms of all sizes, with packages available according to size and user numbers. This makes it scalable for any business and easy to change should the size of the organisation change as well. Typical users have between 1 and 200 staff.	
1.13	Vertical applications:	N/A	
1.14	Server platform and database:	DynamoDB/AWS	
1.15	Client specification required:	Access to web browser and/or business email	
1.16	Partner network:	None currently	

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2.	ISSUES AND CONCLUSION		
Highlighted issues			
2.01	There are a number of limitations in the product, which while not adversely impacting upon this evaluation may be of importance to some organisations. It is important that any business contemplating the purchase of software reviews the functionality described and limitations therein against its detailed requirements. Attention is drawn in particular to the following areas where the product, on its own, may not be suitable for businesses with certain requirements:		
2.02	Findings for considerations by potential customers: (See vendor comments against the various Questions)		
	* No link to Microsoft's Active Directory but this is currently in development.		3.08
	* Whilst there is no audit trail as such, a full history of all messages are retained within the system. Users can archive messages but not delete them.		3.20
	* Whilst data replication and backups are in place for the whole platform, backups/restores for individual customers cannot be undertaken in isolation.		3.28, 6.48
	* There is no internal report generator but this is not part of the required functionality of the platform; which is for client messaging.		4.30-4.37, 6.80-6.92, 7.71-7.79
	* Whilst there is no ability to store preferences and default values on a per-user basis within the platform, the client messaging software will allow some settings here.		5.09
	* There is no universal search facility; but full message search capabilities are provided.		5.15
	* There is a user manual and associated web KB and videos, but there is no context sensitive help within the application or ability to edit the user manual.		5.19-5.22
	* ESCROW is not offered; which is not unusual for this type of software as a service platform.		5.23
	* Service Credits are not offered should an anticipated service SLA not be met; but no SLA is explicitly offered, and it is mainly dependent on third-parties: AWS and Meta.		5.33 6.28
	It is not possible for a customer to take their own backups.		6.51
	Users are not able to test new versions before they go live. Note that this is not uncommon for SaaS platforms.		6.62
	Firms cannot be linked but compliance would likely need to be undertaken separately.		7.22
	* Can roll forward an existing library within an organisation but not copy a library between organisations.		7.41
	* Developer /contractor access via a single AWS account across environments, monitoring software (to supplement that of AWS) and the need for anti-virus will all be reviewed as part of ClientWindow's ongoing ISO27001 accreditation.		6.18, 6.35, 6.39
	* Whilst data replication and backups are in place for the whole platform, backups/restores for individual customers cannot be undertaken in isolation.		3.28, 6.48, 6.51
Evaluation conclusion			

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2.03	<p>For the specific use-cases in support of assisting accountancy firms to communicate with their clients, for which the product is designed, it is a solid and capable solution. It continues to be actively developed and enhanced.</p> <p>Members should be aware of the limitation of the solution as above, and fully understand the role that it can play in helping manage their compliance needs.</p> <p>* NOTE THAT THE QUESTIONNAIRE RELATES TO THE SOFTWARE PRODUCT AND NOT ANY SUPPLEMENTARY SERVICES PROVIDED BY THE SUPPLIER TO THE ACCOUNTANCY FIRM USING THAT PRODUCT *</p> <p>* NOTE TOO THAT THE QUESTIONNAIRE DOES <u>NOT</u> RELATE TO ANY THIRD-PARTY MESSAGING PLATFORMS USED BY THE SERVICE PROVIDER *</p> <p>* ALSO NOTE THAT THAT THE AWS SERVICE LOCATION IS IRELAND. BUYERS OF THE PRODUCT SHOULD BE AWARE THAT PERSONAL DATA IS BEING PROCESSED OUTSIDE OF THE UK *</p>		
Disclaimers			
2.04	<p>Any organisation considering the purchase of this software should consider their requirements in the light of proposals from the software supplier or its dealers and potential suppliers of other similarly specified products. Whilst the contents of this document are presented in good faith, neither ICAEW, nor the ICAEW's Technical Manager (RSM UK Consulting LLP or any party nominated by the ICAEW to perform this role on the ICAEW's behalf) will accept liability for actions taken as a result of comments made herein. The decision to purchase software resides entirely with the organisation.</p>		

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3.	<u>ACCESS AND SECURITY</u>		
Access control			
3.01	What security features are included to control access to the application?	Username and Password + optional MFA	Confirmed. This ia an admin setting.
3.02	Can access to functions be managed via a permissions matrix so users can only see (in menus and other links) and access those areas they are authorised to access?	Yes. ClientWindow breaks down systems privilege into 4 roles: Account User, Account Admin, Account Owner and Reception Admin	Confirmed
3.03	Is this access to the application managed by:- - Individual user profiles? - User groups or job roles?	Individual User Profiles that have the roles outlined in the section above allocated to them.	Confirmed
3.04	Can a report be produced detailing all current users, their user groups if relevant, and their authority levels and/or access rights?	Yes Support Request required.	Confirmed
3.05	If menus can be tailored does the system limit the display of menu options to those for which permission has been granted for each user?	Yes	Confirmed
3.06	Does security allow for access to be limited to: - Read only? - Read/write? - Read/amend/delete?	Yes. Functions within the platform are limited by role but those with appropriate access can send/read/write data.	Confirmed
3.07	If data can be accessed by separate reporting facilities, such as ODBC or an external report writer, is the user access security control applied?	No external access via reporting facilities currently.	Noted
3.08	Does the system security integrate with Microsoft's Active Directory or other tools that provide a single sign-on?	Not yet, on the feature roadmap for 2025.	Noted
3.09	Does the system provide multi-factor authentication (MFA)?	Yes	Confirmed
Passwords and access logs			
3.10	Is access to the software controlled by password?	Yes	Confirmed
3.11	Does each user have a separate log on (user id)?	Yes	Confirmed
3.12	If there is no password facility please state how confidentiality and accessibility control is maintained within the software?	NA	-
3.13	Are passwords masked for any user logging in?	Yes	Confirmed
3.14	Is password complexity available and enforced?	Yes System set, not user configurable	Noted. ClieWindow are currently working towards ISO27001 certification which will cover this.
3.15	Are passwords encrypted?	Yes	Noted
3.16	Are users automatically logged off after a pre-set idle time? - Can the time period be changed? - Can any information be viewed without being logged in, including after logging off, if so what information?	No By design due to type of platform, i.e. chat messaging.	Noted
Deletion of transactions			
3.17	Is it possible to delete a transaction?	NA - there are no transactions	-
3.18	If so, then how are deletions controlled by the system?	No Only allows archive/hide, and not deletions.	-
3.19	Are deleted transactions retained in the audit trail (see below) and denoted as such?	NA - as above no deletions	-
Audit trails			
3.20	Does the system have an audit trail (log) which records all changes to transactions in the system?	NA	No audit trail as such but a full history of all messages are retained within the system. Users can archive messages but not delete them.
3.21	Does this log also record any system error messages and/or any security violations?	NA	-
3.22	Is it possible to turn off or delete the audit trail?	NA	-
3.23	Does the software allocate a system generated sequential unique reference number to each transaction in the audit log, date and time stamp it and record the user id?	NA	-
3.24	Are all master file changes recorded in the audit trail?	NA	-
Compliance			

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3.25	Does the system operate in a way that is compliant with data protection legislation including GDPR? How does the system facilitate this?	Yes. An example of this is we offer full chat history export capability for each client WhatsApp conversation for SAR requirements.	Noted
3.26	Describe your use of sub-processors if any?	AWS Ireland for platform and data hosting	Noted
Backup and recovery			
3.27	Is there a clear indication in the software or manuals as to how the data is backed-up and recovered?	No The Infrastructure is backed up/recovered using AWS best practice, including failover recovery.	Noted
3.28	How often are backups taken and to what point can restores be done?	Daily (RPO would be 24 hrs)	Noted
3.29	How does the software facilitate recovery procedures in the event of software failure? (E.g. roll back to the last completed transaction).	ClientWindow does not have backup/recovery within the application. The Infrastructure is backed up/recovered using AWS best practice, including failover recovery.	Noted
3.30	If software failure occurs part way through a batch or transaction, will the operator have to re-input the batch or only the transaction being input at the time of the failure?	N/A	-
3.31	What features are available within the software to help track down processing problems?	Show error messages on failed message sent and read receipts	Noted

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4.	DATA PROCESSING AND REPORTING		
Input and validation of transactions			
4.01	Is data input controlled by self-explanatory menu options?	Yes	Confirmed
4.02	Are these menus user/role-specific?	Yes	Confirmed
4.03	Can the creation or amendment of standing data (e.g. customer account details) be undertaken using menu options or dialogue boxes as opposed to requiring system configuration?	NA	-
4.04	Does the software provide input validation checks such as: - [account] code validation? - reasonableness limits? - validity checks?	Yes e.g. Whatsapp and Email Format are correct	Noted
4.05	What control features are within the software to ensure completeness and accuracy of data input?	Validation of data entry fields	Noted
4.06	How does the software ensure uniqueness of the input transactions? (i.e. to avoid duplicate transactions)	It doesn't Due to data type it is not relevant.	This is not a transactional system.
4.07	Is data input by users validated by scripts or routines in the browser, or other client software, before transmission to the server?	Yes - where relevant	Noted
4.08	Is data input by users validated by routines running on the server before data files are updated?	Yes - where relevant	Noted
4.09	Does the above validation ensure that data entered in all input boxes: - Cannot be longer than a maximum length? - Cannot contain unaccepted characters such as semi-colons etc?	No. Some rules around phone number length, passwords etc, but not all free text for messaging (length and content).	Noted. (This is not an accounting system; much more free text)
4.10	Are responses to erroneous data input clear so that they do not lead to inappropriate actions?	Yes	Noted
4.11	Does the software have an automatic facility to correct/reverse/delete transactions?	No By design	Noted
4.12	If yes, are these logged in the audit trail?	NA	-
4.13	Are all data entries or file insertions and updates controlled to ensure that should part of a data entry fail the whole transaction fails?	NA	-
4.14	Are messages provided to users clearly explaining whether the data entry or file upload has been processed successfully or not?	Yes	Confirmed
Import and export of data			
4.15	Can files/attachments be uploaded and stored against any transaction?	No	They are an attachment to a message in CW
4.16	Is there an additional charge made for storage of uploaded files? - If yes, please indicate the cost.	No	Noted
4.17	Can data be imported into the system from multiple types of files, e.g. XLS, text, CSV?	By ClientWindow Admins only	Noted. Could do a mobile cut/paste
4.18	Explain how the system validates imports into the system and what happens to any import which fails?	Software checks validity and outputs errors before importing	Noted
4.19	Are imported /interfaced transactions detailed in the audit trail? [See also 3.27]	NA	-
4.20	Can data be exported from all areas of the system to multiple formats e.g. XLS, CSV, PDF, text; if so specify which formats are supported?	No (exception is requests chat history to PDF via self service)	Noted. Conversations can be exported. Also could use cut/paste.
Data processing			
4.21	Does the software ensure that menu options or programs are executed in the correct sequence (e.g. outstanding transactions are processed before month end is run)?	Yes	Noted
4.22	Does the software provide automatic recalculation, where appropriate, of data input? (e.g. VAT)	NA	-
4.23	Is a month/period-end routine required to be undertaken?	No	-
4.24	Is it possible to delete accounts if the balance is Nil but transactions have been recorded against the code?	NA	-
4.25	What is the size and format of reference numbers and descriptions within:- - Ledgers? - Stock? - Currencies?	NA	-
4.26	How does the software guard against/warn about duplicate account numbers on set up?	NA	-

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4.27	How does the software enable the traceability [from, to and through the accounting records] of any source document or interfaced transaction?	NA	-
4.28	What drill down/around functionality is available within the software?	NA	-
4.29	If the software uses a lot of standing information which changes frequently or regularly, does the software allow for such changes to be effected through the use of parameters or tables?	NA	-
Report writer			
4.30	Does the system have an in-built report generator or is a third-party solution used (if so please specify)?	No	-
4.31	Is the report writer based on a standard SQL-type approach and is it flexible and easy to use?	NA	-
4.32	Can the report generator operate over the financial and operational aspects of the system, e.g. combining service metrics with financial information?	NA	-
4.33	Is a comprehensive data dictionary provided to aid field selection?	NA	-
4.34	Does the system provide a library of reports and templates which can be amended, saved and re-run?	NA	-
4.35	Can users create their own reports? If so, what are the controls on users doing this?	NA	-
4.36	Can users create saved searches /filters / queries?	No	-
4.37	Can regular reports be added to user menus in the appropriate area of the system?	NA	-
4.38	Does the system support the production of on demand (interactive) and scheduled batch reports?	No	-

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5.	USABILITY		
Ease of use			
5.01	Does the solution provide a multi-language user interface?	No	Noted
5.02	Does the system allow for customizable branding and UI (e.g. corporate colour palate, upload company logo, etc)?	No	Noted. End-user will just be using WA anyway.
5.03	Does the system have a similar look and feel and overall and consistency between screens and modules?	Yes	Confirmed
5.04	Is data entry easily repeated if similar to previous entry?	NA	Noted. {Cut}{Paste} is supported.
5.05	Does the software prevent access to a record while it is being updated?	NA	-
5.06	Is there locking at file or record level?	NA	-
5.07	Does the software allow for the running of reports whilst records are being updated?	NA	-
5.08	Can timestamps or user comments be added to transactions?	NA	-
5.09	Is there the ability to store preferences and default values on a per-user basis. e.g. department/team/user?	No	Noted. Whilst there is no ability to store preferences and default values on a per-user basis within the platform, the client messaging software will allow some settings here.
5.10	Does the system have the ability to provide user-defined fields with associated validation of data input?	No	Noted
5.11	Can the system provide user with reminders and notifications e.g. workflows?	Notifications - when a new message arrives	Confirmed
5.12	If the system provides workflows, does it have functionality to substitute/delegate authorisations?	NA	-
5.13	Is there the ability for users to define and configure layouts of letters and forms?	NA	-
5.14	Can users save the parameters of searches?	No	Noted
5.15	Does the system have a "universal search" option, allowing a search to be undertaken over all modules of the system?	Partial. Full message search capability within assigned client workspace(s) (role specific)	Noted
5.16	Can the system store menu option 'favourites' on a per user basis?	No	Noted
5.17	Can a user open multiple windows accessing the same or different modules of the system?	Yes	Noted
5.18	Can more than one software function be performed concurrently?	Not restricted but N/A	Noted
User documentation and training			
5.19	Is the manual provided as: - hard copy - on CD - by download - via a web-interface?	Web Knowledge Base, PDF and YouTube Channel.	Noted
5.20	Does the manual include: - An index or search facility? - A guide to basic functions of the software? - Pictures of screens and layouts? - Examples? - A tutorial section? - Details of any error messages and their meanings?	Yes	Noted
5.21	Is context-sensitive help available within the system?	No	Noted. (Error-message related help within the system).
5.22	Is the manual and/or help editable by the user (subject to the permissions matrix)?	No	Noted
5.23	Will the Software House make the detailed program documentation (e.g. file definitions for third party links) available to the user, either directly or by deposit with a third party (ESCROW)?	No	Noted. This is not unusual for cloud based platforms.
5.24	Please detail the training options available?	Comprehensive onboarding Training provided for all clients	Noted

Ref	Requirement	Vendor Response	Reviewer Comments
5.25	Who provides training: - Software House? - VAR?	Software House	Noted
Support and maintenance			
5.26	How is the software sold: - Direct from the software house? - Via a Value Added Reseller (VAR) or Integrator?	Directly	Noted
5.27	How is the product supported: - Direct from the software house? - Via a Value Added Reseller (VAR) or Integrator?	Directly	Noted
5.28	Do VARs have to go through an accreditation process?	NA	-
5.29	Is the software sold based upon number of named users or a number of concurrent users?	Named Users	Noted
5.30	The supplier should detail the support cover options available, covering: - The hours provided? - Associated costs? - The global regions covered?	Support is currently UK Office Hours, available via email and Teams calls	Noted
5.31	Detail the process by which customers raise support requests and how these can be viewed/managed?	Via Email to ticketing system.	Noted
5.32	Please note the methods of support available: - Telephone? - Internet chat? - Remote access to customer workstation? - Other, please specify?	Email and Teams Calls	Noted
5.33	Do you offer service credits for failure to meet performance around SLA and uptime (if applicable)	Not Currently	Noted. AWS and/or Meta are largely responsible for this.
5.34	What is your escalation path for tickets which have not been resolved within a reasonable time?	Via our ticketing system that prioritizes tickets.	Noted
5.35	How often are general software enhancements provided?	Monthly	Noted
5.36	Will they be given free of charge?	Yes	Noted
5.37	How are enhancements and bug fixes provided to customers?	Via the centralised Cloud platform	Noted
5.38	Is "hot line" support to assist with immediate problem solving available?	No	Noted
5.39	If so, is there an additional cost involved?	NA	-
5.40	At what times will this support be available?	NA	Noted
Integration and www facilities			
5.41	Can the software be linked to other packages e.g. word processing, graphics, financial modelling, to provide alternative display and reporting facilities?	Linked to Business Email	Noted. Anything with SMTP based email output.
5.42	Can definable links to spreadsheets be created?	No	but N/A
5.43	Does the system provide secure document storage capability: If so, please give examples of the document types saved and what transactions these might relate to.	No	Noted
5.44	Can documents be scanned into a secure repository?	No	Noted
5.45	Does the system provide data migration tools for transactional and master data sets (e.g. employees customers, suppliers, journals, invoices).	No	Noted
5.46	What connection mechanisms does the software have and what breadth of functionality in terms of: - operations (add, update, delete)? and - what transactions/data it can access? E.g. if webservices APIs available, then can customers connect to whatever software they wish?	No Public API currently available	Noted
5.47	Does the system support mobile working?	Yes - Apple and Android apps	Noted

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6.	SAAS/HOSTED OPERATION		
	This evaluation covers the system but not the method by which it is delivered and/or contracted for. Potential users need to satisfy themselves on the security and disaster recovery aspects and licensing of the online system and any data protection issues of their own and customer/supplier information, contained therein, being held on the system, as well as the return of the data when the contract expires or is terminated.		
Data centres and customer data			
6.01	Whose data centres are used and where are these located: - If hosted -- where data centre controlled by a third-party? - If SaaS -- where the software vendor will be in control?	Hosting in AWS Ireland	Noted
6.02	Does the customer get a choice of the jurisdiction in which their data resides?	Not currently but US will come in time	Noted
6.03	What certification(s) do you or your platform operators hold relating to your data centres and your business operations?	Currently going through ISO27001 certification, ETA September 2024 Look at AWS website for more details (extensive) "https://aws.amazon.com/compliance/iso-certified/" And https://docs.aws.amazon.com/whitepapers/latest/introduction-aws-security/compliance.html	Noted
6.04	Do you or your platform operator have an SSAE16 (System and Organization Controls) report available?	AWS - Yes	Noted
6.05	What are the physical controls over the:- - Premises? - Fileservers? - Communications equipment?	https://aws.amazon.com/compliance/data-center/perimeter-layer/	Noted
6.06	Is the space in this/these data centre(s) shared with any other companies?	Yes - managed by AWS Secure Virtual environment	Noted
6.07	Is data for different customers/companies kept:- - On separate servers? - In different databases? - In separate database tables? - In a database with data for other customers and companies using logical security to partition customers' data?	No - SaaS Multi-tenant platform Yes (for point 4).	Noted
6.08	How is it ensured that data for different customers and companies is reliably identifiable and only accessed by authorised users for each customer/company?	Every record has a customer identifier, and access control policies limit data access.	Noted
6.09	What controls are in place to prevent users from one customer/company accessing data from another customer/company by accident or by design?	As above	Noted
6.10	How is [Internet] communication traffic monitored to identify potential problems before they happen: - From a performance perspective? - From a security standpoint?	Not currently monitored	Noted
6.11	What procedures are in place to prevent a break in Internet Connection (at the server, client or in between) from causing data corruption?	The database is ACID compliant to ensure integrity of data in case of internet failure.	Noted
6.12	Are communications between the user's computer and the software service encrypted: - User log in data only? - All data exchanged between user client and software service?	Yes - all data in transit (TLS)	Noted
6.13	Is data on your servers encrypted at rest?	Yes	Noted
6.14	Is a test environment provided to test configuration changes? If so, is there an additional charge for this?	Yes, no additional charging	Noted
Access to customer data			
6.15	What are the implications of the Data Protection Act over information held by the hosting service provider, and how does the vendor mitigate these?	To implement strong security measures, including encryption, access controls, regular security audits, and vulnerability assessments.	Noted

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6.16	Are you subject to any legal or regulatory requirements obliging you to retain a copy of customer data?	No	Noted
6.17	Who will be able to access or see customer data?	customers (ringfenced - with granular control as per customer-configured Role Based Access Control), plus development team (contractors) with access to AWS infrastructure	Noted
6.18	Explain the procedures to prevent unauthorised access from staff, or contractors, working for the service provider or any other people with access to the service provider's internal systems.	Currently, all developers and contractors access a single AWS account across environments.	Noted. Ongoing ISO27001 accreditation will review the needs here.
6.19	Explain the release management procedures in place and the associated segregation of duties ?	Releases are manually triggered using deployment scripts. they are approved by the Chief Product Officer (CPO).	Noted
6.20	Is there sufficient segregation of duties preventing system developers from accessing and changing live applications and data files?	Yes	Noted
6.21	Explain the review and approval procedures covering system operations staff when emergency changes need to be made to live applications and data?	Approval is required by CPO and CTO, for any changes. Formal documentation in process as part of ISO 27001 requirements.	Noted
6.22	Is an audit trail always maintained of these emergency changes?	communication of changes recorded (email and slack) - see above ISO 27001 for formal policy	Noted
6.23	What procedures are in place when members of staff leave to ensure that their system access is stopped?	Access is revoked to email and internal systems on the last day of employment	Noted
Platform and service levels			
6.24	Which databases can be used (Hosted) or are used (SaaS)?	SaaS only.	Noted
6.25	What forms of user authentication are supported e.g. user names, passwords certificates, tokens etc.?	username & password, optional MFA with TOTP codes and/or SMS	Noted
6.26	What is the proposed product/service availability percentage?	99%	Noted
6.27	What percentage availability has been achieved over the past 12 months?	this is not currently recorded	Noted
6.28	Is a service level agreement ("SLA") offered regarding: - Service availability? - Data recovery?	no	Noted
6.29	Is the service available 24x7 or are there downtime periods for maintenance?	there are no maintenance periods, service aims for 24/7 availability	Noted. Seamless update without any maintenance window being required.
6.30	Is the customer made aware of maintenance periods in advance?	n/a	-
6.31	Does the application software:- - Require any client software to be installed on the user's computer? - Work entirely within Internet Browser software on the user's computer?	Browser based	Noted
6.32	Where the product/service relies upon downloading and running an executable program, has that program been secured with a digital certificate to verify the source and integrity of the program?	Mobile Apps require digital signature verified by App Store(s) - Google/Apple. N/A for browser.	Noted
Platform security			
6.33	What security steps are taken to prevent and detect intrusion attempts?	Login service temporarily blocks user access after multiple failed login attempts.	Noted
6.34	Is firewall hardware and software used to protect the live systems from unauthorised access?	the app is Internet facing with authentication and authorisation controls implemented in the API. In front of the API we have AWS Shield Standard, a DDoS mitigation solution.	Noted
6.35	Which monitoring software is used to create alerts when intrusion attempts are suspected?	None at this time. Regular PEN tests are undertaken.	Noted. Ongoing ISO27001 accreditation will review the needs here.
6.36	Are designated staff responsible for receiving and urgently responding to these alerts?	Yes	Noted
6.37	Have clear procedures been established for identifying and responding to security incidents?	Being implemented as part of ISO 27001	Noted

Ref	Requirement	Vendor Response	Reviewer Comments
6.38	Is all security sensitive software, such as operating systems and databases, kept up to date with the latest software patches? Please indicate how regularly updates are applied.	the API runtime is updated approximately twice a year, though there is no strict schedule. All other runtimes are AWS managed services. The database cluster receives minor version updates automatically once per week (major upgrades would be manual)	Noted
6.39	List the procedures and software tools in place to prevent or detect and eliminate interference from malicious code, such as viruses?	Antivirus is not a current feature of the platform, but users accessing application are protected. Utilising the underlying WA infrastructure to receive and deliver messages. Platform dependencies are audited by 3rd party tools for malicious code.	Noted. Ongoing ISO27001 accreditation will review the needs here.
6.40	Is a system log maintained by the service provider that details - User access? - User activity? - Error messages? - Security violations?	Yes - AWS Cloud Watch	Noted
6.41	Is this log available to the customer?	No	Noted
6.42	Have there been any successful unauthorised access attempts been made during the last year? If Yes:- - What was the effect on the business and users? - What steps are in place to prevent this happening again?	Pentest ran in June 2024 and attempted unauthorised access was unsuccessful	Noted
6.43	Is penetration testing regularly carried out by (please indicate frequency of tests): - Staff specialising in this field? - External specialists?	external specialists (annual)	Noted
6.44	If penetration testing by a specialist is not performed regularly, please indicate the main procedures in place to identify weaknesses?	n/a	-
6.45	Are security procedures regularly reviewed? Please indicate frequency of reviews.	ISO27001 (in progress) requires regular management and risk review of all IT security and policies/procedures.	Noted
6.46	What security reporting is provided demonstrating compliance against certification(s) and policy(ies)?	Risk Reporting is part of ISO27001	Noted
6.47	Are any security breaches communicated to customers?	Yes - if found.	Noted
Backups by the service provider			
6.48	In relation to backups undertaken by the system provider please explain: - How is a customer's data backed up? - How often is this undertaken? - What is backed up? - What's the media used? - Where are backups stored? - How many copies are there? - How long are they retained for? - Who has access to them? - Is the data encrypted?	The database is backed up (automated snapshot taken daily at 02:39-03:09 UTC) using AWS RDS backups, which replicates the backup data to a different availability zone (datacenter) in same region (Ireland). 7 daily backups are kept on a rolling basis. Ad-hoc backups are made and kept indefinitely.	Noted
6.49	How frequently is a test-restore of backups undertaken?	Quarterly	Noted
6.50	Can the provider restore from a backups that it has taken at a customer request?	Yes. At special request; a simple roll-back is not available. Ordinarily this should not be required as users cannot delete messages only archive them.	Noted
6.51	Does a customer have the ability to undertake their own backups?	not natively, although their correspondence can be backed up if they use the email journalling feature.	Noted
6.52	If so, can a customer restore data a backup that they have taken?	no, there is no way to restore data without opening a support request	Noted
Platform recovery			

Ref	Requirement	Vendor Response	Reviewer Comments
6.53	<p>What contingency plans are in place to enable a quick recovery from:</p> <ul style="list-style-type: none"> - Database or application software corruption? - Hardware failure or theft? - Fire, flood and other disasters? - Communication failures? 	<p>If Database fails there is an auto failover to another instance in same region.</p> <p>If Database corrupts then restore (as noted above) is contingency.</p> <p>For Physical environment risks, as per AWS failover policy. We have 3 x availability zones within EU region.</p>	Noted
6.54	How often are these plans tested?	Quarterly	Noted
6.55	How often are these plans reviewed and updated?	Annual	Noted
6.56	<p>What are your:</p> <ul style="list-style-type: none"> - Recovery Point Object (RPO) standards? - Recovery Time Objective (RTO) minimum standards? 	<p>RPO - 24 hours</p> <p>RTO - 24 hours</p>	Noted
6.57	If transaction records are dated and time stamped are the times used local to the user or based on where the server is located?	all database timestamps are stored as UTC	Noted
6.58	What protection is in place to enable users to able to access their accounting and other data if the service provider should experience serious difficulties, cease trading or decide to stop providing the service?	none at this time	Noted
6.59	<p>If the system is hosted are there arrangements in place for this third party to continue providing a hosting service in the short term to allow time for customers to negotiate their own arrangements?</p> <p>If so, how long does the arrangement allow?</p>	no	Noted
6.60	Are there any individual members of the vendor's staff whose leaving or illness would significantly reduce, or even stop, the service provider's ability to provide a full and reliable service to customers?	No	Noted
Platform change management			
6.61	Describe your approach to upgrades including what option customers have not to take upgrades (if any)?	customers are not able to opt-out of updates	Noted
6.62	Are users able to test the application before new versions go into live use?	no	Noted
6.63	Are users given notice before application changes are applied to the live system?	Via Automated Customer Updates	Noted
6.64	Are changes delivered into the live environment "switched off" to enable users to test them before enabling them for their environment?	No. Common feature set for all customers. New features are notified to customers in advance.	Noted
6.65	Describe what testing and QA processes are undertaken before upgrades and other changes are made live/available to customers?	<p>there is a suite of automated end-to-end tests that are run against a staging environment before the production release</p> <p>as new features are added, or bugs fixes, new tests are added to this suite</p>	Noted
6.66	If a hosted system, explain the release management procedures in place and the associated segregation of duties?	As per above section - in progress	Noted
6.67	Are users informed when they next login of the application changes that have gone into live use?	no	Noted
6.68	<p>Do customer staff have to take any action (e.g. regression testing) when new editions, patches or upgrades are released?</p> <p>If so, please describe what they should ordinarily do.</p>	no	Noted
Subscription options			
6.69	What is the minimum level of commitment must the customer sign up to, e.g. 36 months?	1 month	Noted
6.70	Where online payment is used, what type of security is used to protect sensitive information?	PayPro Global is provider and we delegate this security to them as a PCI compliant vendor.	Noted
6.71	Where online subscription / payment is used, is an invoice provided to the customer and, if so, in what format?	Yes - Digital	Noted
6.72	When subscriptions need to be renewed, what advance notice is provided and what is the time limit for renewal?	Auto-renewal with indicator in app settings confirming details of upcoming renewal.	Noted
6.73	Is there a procedure for late renewal and is there a time limit after which subscriptions cannot be renewed?	If cancelled, client can re-active the account by adding a paid plan.	Noted
6.74	How soon after creating or renewing a subscription (if applicable) can the system / service be used?	Immediately	Noted

Ref	Requirement	Vendor Response	Reviewer Comments
6.75	What notifications / confirmations are provided to the customer regarding subscriptions and payments?	Automated Emails	Noted
6.76	To what extent are users able to access their accounting and other data if: - They miss one or two payments? - They cease being customers?	By request	Noted
6.77	At the end of the contract term, how long does a customer have to obtain a copy of their data from you?	Negotiable - but never deleted unless requested	Noted
6.78	At the end of the contract term, how is a customer's data destroyed (if appropriate) and will that destruction be certified?	Destroyed on request, and removed from Database.	Noted
6.79	What is your processes regarding disposal of end-of-life and failed hardware devices that were used to operate your service?	N/A	- (Hardware provided by AWS / Meta)
SaaS/Hosted Reporting			
6.80	Are reports produced from the same software as the financial applications or is separate reporting software used?	N/A - No reporting	-
6.81	Does any application software (i.e. other than a web browser or PDF reader) need to be installed on the user's computer in order to prepare or view the reports?	As above	-
6.82	What browser versions are support: - On desktop/laptop (PC, Mac, Linux)? - On Tablets? - On mobiles?	As above	-
6.83	Is access to the reporting facilities and data controlled by the same procedures as access to the main application?	As above	-
6.84	If it's different, explain the user access control facilities available to ensure information is only viewed by users with appropriate authority?	As above	-
6.85	In what electronic formats are reports produced:- - PDF? - XML? - MS Excel spreadsheet? - CSV file? - As html for viewing in a web browser? - Other, please specify?	As above	-
6.86	Are report documents stored on the web server or on the user's computer? If stored on the web server, are they secure to ensure only users with appropriate authority can get access?	As above	-
6.87	For documents viewable in a browser is any data stored on the user's computer in a web browser cache or temporary file? If Yes: - Is there any protection against other users viewing the report or data on which it is based? - Is it clear on the reports when they were produced and the date of the data on which they are based, so the user can tell whether they are viewing out of date information?	As above	-
6.88	Are communications between the browser and the server encrypted for any report related communications?	As above	-
6.89	If reports are produced dynamically each time the user views them can historical reports be reproduced at any time?	As above	-
6.90	Can reports viewable in a browser be navigated dynamically by users? For example: - Enabling drill down to more detailed information? - Altering which columns and rows of data are displayed. - Choosing time periods? - Specifying selection criteria?	As above	-
6.91	Can report data be reliably copied and pasted direct from browser viewable reports to an MS Excel spreadsheet retaining any table layout?	As above	-
6.92	If reports are incomplete, for instance due to a poor Internet connection, is sufficient information provided to enable the user to notice that some of the report is missing?	As above	-

Ref	Requirement	Vendor Response	Reviewer Comments
7.	<u>CLIENT COMMUNICATION</u>		
	Note that the phrase: "Firm" has been used for the Firm of Accountants having individual "Users" of the software; their Team members, "Client" has been used for the individual Client of the accounting Firm, and "Contact" has been used for individuals at the Client.		
Global configuration/setup			
7.01	Does the system provide for the setup and maintenance of the details of the Firm which has Users using the software?	Yes company name and WhatsApp number	Confirmed
7.02	Does the system provide a permissions matrix so that rights can be set at User and role/group level?	Yes - defined in roles	Confirmed
7.03	Does this apply to: - Specific areas of functionality? - Access to any linked systems? - Manually adding/editing of workspaces/threads? - Authorisations? - A particular Client or number of Clients of the firm? - An individual Client's messages? - Other, please specify?	Functionality and ability to see/send messages on specific client spaces	Confirmed
7.04	Is it possible to define delegated access?	No	Noted
7.05	Can multi-level authorisations be set?	No	Noted
7.06	Are there restrictions on more than one User working in the same Client workspace at the same time?	No	Confirmed
7.07	Are there restrictions on more than one User working in multiple workspaces (for different Clients) at the same time?	No	Confirmed
7.08	Can a User of the system have multiple windows open at the same time on a single Client workspace?	Yes	Confirmed
7.09	Does the system allow a User to use multiple devices to support mobile working, e.g. a workstation and/or a tablet?	Yes	Confirmed
7.10	If so, does the system have a dedicated mobile app? If so what is supported : - iOS devices - Android devices - Mobile browser use - Other (please explain)?	Yes - all listed	Confirmed
7.11	Does the system require biometrics or complex passwords to be in place on the end user's mobile device?	No	Noted
7.12	Does the system enforce MFA to authenticate users?	Optional	Confirmed
7.13	Does the system provide a facility for auto-saving entries made into the system (e.g. creation of a message or email) during a User's editing session? If so: - Can the frequency of these auto-saves be manually set? - Can the User initiate a save manually? - In the event that the User's session is interrupted is a "draft" message automatically saved?	No	Noted
7.14	Can the system work in an "offline" mode, with transactions transferred to the service once Internet connectivity is available and enabled? i.e. can information be completed off-line and sent when an Internet connection is subsequently available?	No	Confirmed
7.15	Does the system have an audit trail that includes details of: - Changes to standing data (setups/options/etc)? - All manual entries/changes to inputs made by a User?	Yes but queries through the development team	Noted
7.16	What security accreditations, e.g. ISO27001, does the platform provider have in place?	ISO27001 currently being undertaken, ETA late 2024	Noted
7.17	Are there any controls in place around international usage while a Contact is travelling, e.g. to locations outside the EEA where data protection agreements with the UK are not in place?	No	Noted
Messaging integration			

Ref	Requirement	Vendor Response	Reviewer Comments
7.18	Does the software directly integrate with on-line software/services? If yes, please list the packages/services in the categories below and explain the method of integration (e.g. dedicated connector, webservices, API, etc): - Other messaging applications? - Other email applications? - On-line cloud storage (e.g. Dropbox, OneDrive, etc)? - Document management software? - Document "scan and upload" type software? - Accounting software (e.g. Sage, QB, Xero)? - Task scheduling, to-do list management? - Others, please specify?	Indirectly to Hubdoc, AutoEntry, Dext and Apron via email.	Noted; the client (WA user) is not aware of the integration in the background.
7.19	What client messaging application can be used: - Internal messaging application? - Mobile SMS? - WhatsApp? - Apple iMessage? - WeChat? - Facebook Messenger? - Other, please specify?	WhatsApp and WeChat	Noted. Note that this Accreditation was undertaken with the platform integrated with WhatsApp.
7.20	If yes, is there an additional subscription / cost to use third-party messaging clients?	No	Noted
Client Setup			
7.21	Does the system provide for the setup and maintenance of a Firm's Client details (Client profiles)?	Yes	Confirmed
7.22	Can the system record Client contacts, notes, etc as required?	Client Contacts + their WhatsApp numbers	Confirmed
7.23	Does the system allow the entry of supplementary information? If yes, can this be uploaded and held against the Client?	No	Noted
7.24	Does the system automatically populate information from the Client profile into associated workspaces during creation??	No	Confirmed. The workspace is where the "people" are.
7.25	Does the system allow Clients to be linked?	No but contacts can be part of multiple client spaces	Noted
7.26	Does the system allow Client workspaces to be linked?	No	Noted
7.27	Does the system allow all workspaces and messages created for a Client to be: - Shown as a list on-screen? - The details viewed on-screen? - Details to be printed out?	Yes. And message history can be exported	Confirmed
Dashboard			
7.28	Does the system incorporate dashboard functionality such that the following information is presented to the user on their "home page" when they login to the system: - Clients that the User is associated with - Workspaces for each Client? - Client contacts? - Messages within workspaces? - Other, please specify?	It provides an aggregated view of current client conversations under "messages"	Confirmed. The view presents a very easy "tree" to navigate.
7.29	Does the system provide an easy way to search for messages, with search parameters such as: - Client - Workspace - Date-range - Other (please specify)?	Yes. In the UI it is text based rather than date-range. For an account owner (and Admins) this is across all workspaces; but for Account Users it's just their specific assigned workspaces.	Confirmed
7.30	If so, can the User navigate directly from the dashboard into a message?	Yes	Confirmed
7.31	Does the dashboard allow message(s) to be filtered by: - Firm's user(s)? - Client? - Workspace? - Client contact? - Date-range? - Other, please specify?	There is no "dashboard" per se; but UI offers quick and easy access.	Confirmed. See 7.28 above.
7.32	Is possible to set alerts/reminders/appointments from the dashboard, e.g. To respond to an incoming message?	Yes - Browser and Email notifications on desktop, Mobile alerts on mobile	Confirmed
7.33	If so, do these integrate with Microsoft Outlook?	Yes all email clients	Noted

Ref	Requirement	Vendor Response	Reviewer Comments
Workspaces and Threads			
7.34	Does the platform allow the creation of workspaces by a User of the Firm ; these being a client-specific area that can contain groups of messages?	Yes	Confirmed
7.35	Can a workspace be toggled as active to enable message to be created/transferred, or inactive to stop message creation/transfer?	Active or Archived	Confirmed
7.36	Is it possible to archive an inactive workspace so that it no longer appears visible to Users, with the exception of to a User with the specific permissions allowing them to toggle archive/unarchive?	Yes	Confirmed
7.37	Can a specific client (customer) or group of clients be assigned to a Workspace?	Yes	Confirmed
7.38	Can individual client contacts be added to a workspace: - By a User with appropriate rights? - By a specific contact at the client with those rights? - In some another way / by another user (please explain).	Only by users not contacts	Confirmed
7.39	Can Users within the Firm be allocated to specific client workspaces: - All workspaces for that client? - Specific workspaces for that client?	Yes	Confirmed
7.40	Can the Firm add to a workspace particular individuals who are not part of the Client's organisation, e.g. an associate, contractor or assessor?	Yes	Confirmed. Simply add with their WA number.
7.41	If so, can this individual be set to have: - View only access? - View and receive only access? - Full view, send/receive access?	Access will be set as per roles mentioned previously	Noted
7.42	Is it possible to categorise groups of messages within a particular workspace into disparate conversations, i.e. messaging "threads"?	Yes	Confirmed
7.43	Is there any limit to the number of threads within a workspace?	No	Noted
7.44	Can a thread span multiple workspaces?	No	Noted
7.45	Can a message span multiple workspaces, i.e. a "global" message to all contacts at all Clients of the Firm?	No	Noted
7.46	Can a message span multiple threads, i.e. a message across all users in all conversations for a client?	No	Noted
7.47	How are messages from a Contact sent forward only to the intended recipient within the Client's organisation?	By client space and chat group participation	Confirmed. Only internally assigned of the group will see the message.
7.48	Please describe the controls around this.	Contacts can only send messages to chat groups they have been assigned to from WhatsApp	Noted
Messages			
<i>Messaging:</i>			
7.49	Are there particular setup items that must be undertaken before a users is able to use the messaging client, e.g. assignment of a user-name, activation, etc?	Yes	Confirmed
7.50	Is there additional setup required for use of third-party messaging clients? If so, explain what is required, e.g. a phone number must be linked to the users if they are to use a WhatsApp client?	Only contacts with a WhatsApp number associated with their mobile phone can message in to the firm over WhatsApp	Noted
7.51	Explain the level/type of encryption provided by: - The platform's internal messaging system? - Integrated third-party messaging clients?	Encrypted in transit, encrypted at rest (with TLS used for email transmission). (And whatever the third-party provides)	Noted
7.52	If a third-party messaging client is used to send a message then is a sent message replicated in the outbox of the platform's own messaging system?	Yes	Confirmed. (Essentially it's treated as an email)
7.53	If a third-party messaging client is used to receive a message then is that message replicated in the inbox of the platform's own messaging system?	Yes	Confirmed
7.54	Does the system support voice-messaging? If so, does it provide automatic transcription?	Yes and Yes	Confirmed
7.55	Is it possible to send images and attachments using messaging services? If so, what security is in place around this?	Yes - same as WhatsApp security	Noted
<i>Email:</i>			

Ref	Requirement	Vendor Response	Reviewer Comments
7.56	If the platform provides email integration, does this allow: - Receiving as an email a message sent from a messaging client? - Receiving as an email a message sent from an email client? - Sending a message as an email? - Other (please specify)?	Yes, no, yes, N/A	Confirmed. The platform is a client WA to business email solution.
7.57	If a linked third-party email system is used to send a message then is a sent message replicated in the outbox of the platform's own messaging system?	Yes	Confirmed
7.58	If a linked third-party messaging client is used to receive a message then is that message replicated in the inbox of the platform's own messaging system?	Yes. The two sync.	Confirmed
<i>Other systems:</i>			
7.59	If other message/related integrations are provided please explain what functionality is provided with/to/from each.	Yes	Noted
Other features			
<i>Document Transfer:</i>			
7.60	Does the platform allow documents to be attached to messages and process them through the platform?	Yes	Confirmed
7.61	Is so, is an attached document delivered as : - An attachment to a message if the sender is using a messaging client and the recipient is also using a messaging client? - An attachment to a message if the sender is using an email client and the recipient is using a messaging client?	Yes	Confirmed
<i>Document Store:</i>			
7.62	Can documents be uploaded to workspaces and/or threads for access by all users who have access to that workspace and/or thread?	No	Noted. Just an attachment to a specific message.
7.63	Does the platform provide integration with any document management systems? If so, provide details of the systems supported.	Yes, if they can receive documents via email	Noted
<i>Broadcast Messages:</i>			
7.64	Can "broadcast messages" be made to all contacts in: - A thread? - A workspace? - All contacts of a single client? See also 7.4 and 7.42 above.	Ongoing development	Noted
<i>Quarantine:</i>			
7.65	Does the platform provide a holding area for incoming messages that are not identified as belonging to a specific Team member or Client Contact (i.e. whose email or phone number is not within the platform for the Firm)? If so, can a User at the Firm be given rights to view and forward these messages?	Yes - the Reception	Confirmed. And the message can then be moved to a specific client workspace.
<i>Audit Trail:</i>			
7.66	Can a User delete: - A single outgoing message? - A single incoming message? - Multiple messages? - A whole thread? - All messages in a workspace?	No delete feature	Confirmed
7.67	Can deleted messages be: - Viewed? - Undeleted (e.g. Recovered from a "Deleted items" box)?	NA	-
7.68	If so, which Users can do this?	NA	-
7.69	Is it possible to archive specific messages/threads so that they no longer appear visible to Users, with the exception of a User with permissions allowing them to toggle archive/unarchive? See also item 7.33.	Yes	Confirmed
7.70	Does the system have an audit trail that captures details of: - Messages sent, received, forwarded and deleted? - Emails sent, received, forwarded and deleted? - Actions on Workspaces (e.g. creation)? - Actions on Threads (e.g. creation)? - Deletion/undeletion of messages, threads, workspaces? - Archiving/unarchiving actions? - Other, please specify.	In the backend only - not visible to firms	Noted. The trail of messages remains within the system as messages can only be archived not deleted.

Ref	Requirement	Vendor Response	Reviewer Comments
Reporting			
7.71	Does the system provide a series of inbuilt reports that cover: - Lists of clients, workspaces, threads and messages? - Messages/threads deleted and/or archived? - Audit trails; - Any other reports/documents; please describe what is available.	Not currently	Noted. Reporting is not part of the current functionality.
7.72	Can reports be filtered by a mix of: - Client(s)? - Workspace(s)? - Thread(s)? - Message date range? - Sender, Receiver, Forwarder? - Other, please specify.	NA	-
7.73	Does the system allow drill through from a report into the underlying messages?	NA	-
7.74	Are all reports adequately titled and dated? e.g. report name, Client name, pages, numbers etc.	NA	-
7.75	Does the system allow the layout of reports / documents to be customised: - Font? - Paragraph style? - Page format? - Watermark, e.g. "Draft"? - Firm's logo/graphic? - Other, please specify	NA	-
7.76	If so, does the system allow graphics and/or Firm logos to be incorporated in the page formatting?	NA	-
7.77	Can all reports be print previewed?	NA	-
7.78	Does the reporting functionality have the facility to scroll up and down when output to screen?	NA	-
7.79	Can reports be output directly to other formats e.g. Excel, CSV, txt, XML, PDF etc. for any period of time required? - If so, please state the formats supported.	Export message history on specific group chat only - to PDF	Confirmed