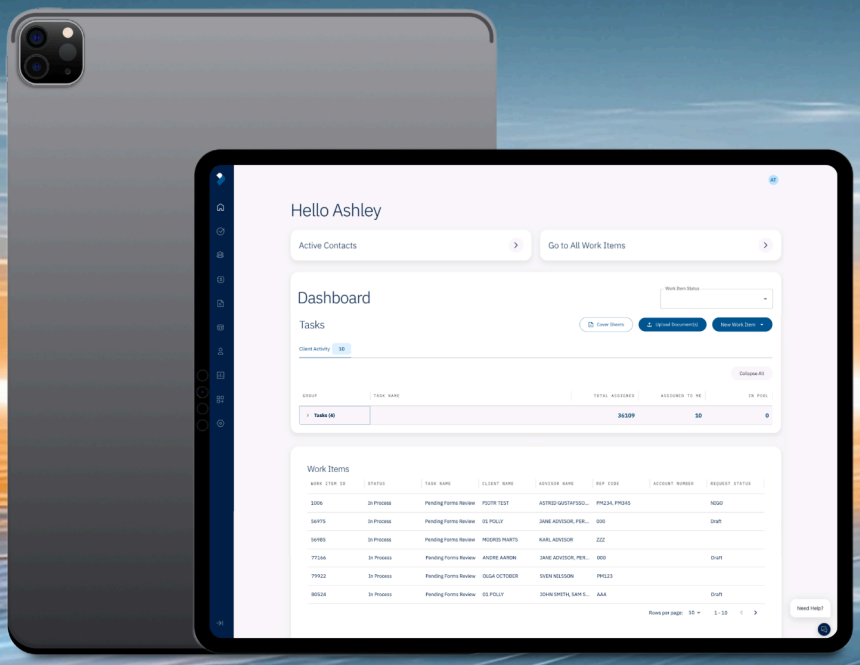
Docupace Next

OVERVIEW GUIDE

From Connect to Next

What's new, what works differently, and what carries forward when your firm moves to Docupace Next.



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About This Guide

This guide explains how Docupace Next differs from Connect in seven areas: terminology, capabilities that carry forward, features that work differently, new capabilities, technology, integrations and retired functionality. Each change comes with the reason behind it and what it means for your firm. The workflows your team knows carry forward, so getting comfortable with Docupace Next is mostly a matter of learning where things live and what they're called now.

How to use it: each section stands on its own. Start with Section 1, because the rest of the guide uses Docupace Next terms.

SECTION 1

Terminology Differences

Connect labels described where a record lived in the folder structure. Docupace Next labels describe what the record is. That shift lets the same person or entity appear across many accounts instead of being duplicated in each folder. The new names don't change how anything works, but you'll see them everywhere: on screens, in help articles, and in training.

CONNECT	DOCUPACE NEXT	WHAT TO KNOW
Client Folder Domain 110	**Contact**	The Pershing and NFS wizards create Contacts for many more account parties than holders alone, including Beneficiaries and Trusted Contacts. Contact information is stored once and reused across accounts.
Client Sub-Folder, Is Account = Yes Domain 115	**Account**	A new Is Account flag. When it is set to Yes, Docupace Next treats the sub-folder as an Account.
Client Sub-Folder, Is Account ≠ Yes Domain 115	**Folder**	There's no flat list of folders. Folders appear under the Contact they belong to.
Authorized Individuals, Primary Beneficiaries, Contingent Beneficiaries	**Related Contacts**	In Connect these parties were names held on the Client Folder. In Docupace Next each party is a Contact of its own, linked to the primary Contact with the relationship type recorded. The data migration is automated as part of your upgrade.
My Tasks	**Tasks**	Tasks shows every in-progress task you're authorized to see.
Barcode Mapping Domain 310	**Copy From**	Configured through the UI in Connect. In Docupace Next, use Copy From to copy indexing and routing from an existing document.
Entities Domain 223	**Tenants**	A name change only. Tenants sit at the site level, and many Tenant settings apply site-wide.

SECTION 2

Core Capabilities that Carry Forward

These capabilities move with you to Docupace Next. Where the screen, the path to reach it or the name is different, the difference is noted.

	WHAT CARRIES FORWARD	WHAT'S DIFFERENT
Task Dashboard	You still land on a view of the tasks that need your attention, with the same day-to-day actions.	My Tasks is now Tasks, and it shows every in-progress task you're authorized to see.
Work Items	Work items are created, processed, assigned and tracked as they are today.	Bulk work management moves from Monitor into the Work Items views: All Work Items, Active and Assigned to Me.
Contacts	Client records carry forward with the same core client data.	Renamed from Client Folder. Parties once held on the folder are now Related Contacts, and more party types are captured.
Accounts	The Client, Account and Document hierarchy is preserved, along with account-level data.	An account is a sub-folder with the Is Account flag set to Yes, rather than inferred from setup.
Documents	Storage, retrieval, viewing and indexing carry forward. No documents or history are lost.	No flat folder list; folders appear under the Contact. Barcode Mapping becomes Copy From.
Document Viewer	Documents still open in an in-platform viewer with the same actions.	Improved: actions are easier to see in the header, the viewer is cleaner, and validations are clearer within the document.
Advisor Office Documents	Existing advisor folders and their documents carry forward. Nothing needs to be re-filed or re-uploaded.	Easier to find. Open Advisors from the main Docupace Next menu.
Mailroom	Uploaded and scanned documents are still indexed and routed to the right record or work item.	Reached from the Task Dashboard. Barcode tools are still available for scanning and indexing.
Forms	The forms library, form completion and form generation carry forward.	No change.

	WHAT CARRIES FORWARD	WHAT'S DIFFERENT
Form Favorites	Your existing favorites are preserved, and you can still mark forms for quick access.	Connect called a favorites list a "Label." Docupace Next uses "New List Name."
Workflow	Configured workflows carry forward with all their actions, transitions, rules and settings, including eSign (DocuSign and SIGNiX), wet signature with barcode coversheets, document delivery (fax, Send to Sponsor, Send to Custodian, Mail Originals) and post-processing quality review.	No change to workflow configuration. New: one signing packet can span several work items (Section 4).
Reports	Existing reports carry forward, and Open Reports is still available with an updated look.	New: a standard dashboard of common reports, with the ability to also access Open Reports from the new UI.
Administration	Administrative configuration carries forward, including record-level control.	Grouped by category (users, entitlements, features, integrations) instead of spread across admin panel screens.
Security and Hierarchy	Firm hierarchy, data roles and security filtering stay the same. Users see what their data role and position allow.	No change to how security is modeled or how access is granted.
Loading Users, Reps and Contacts	Bulk loads still run through DocuCapture with the same file-based process.	No change.
Legacy Connect Admin Panel	Still available. If a setting isn't in Docupace Next yet, you can finish the task in the legacy panel.	Use Docupace Next administration first. No administrative task is blocked during the transition.
TRACKR	Carries forward with the same tracking capability.	Now part of the core platform, turned on through feature flags and data role access instead of a separate Docupace Start application. TRACKR is an add-on feature, so talk with your CSM about access.
Transition Assistant	Carries forward with the same transition capability.	Now available in Docupace Next. Transition Assistant is still a standalone product, so firms that also use NAO keep two sites: one for NAO and one for Transition Assistant.

SECTION 3

Features that Work Differently

These capabilities exist in both platforms but work differently. What you do changes, even though the outcome is the same. Capabilities that are new to Docupace Next are in Section 4.

Folder Navigation

Impact: Low

In Connect: Folders can be browsed as a flat list, separate from the client they belong to.

How to get there: Open the Contact, then the Folder. Search still works for direct lookup.

In Docupace Next: No flat folder list. Folders appear under the Contact they belong to.

Why it changed: Navigation follows the client relationship, so you find documents by who they belong to instead of where they were filed. No data is lost.

Account Parties: Authorized Individuals and Beneficiaries

Impact: Low to adopt, high in value

In Connect: Authorized Individuals and Primary and Contingent Beneficiaries are names held on the Client Folder.

How to get there: Open the Contact and view Related Contacts. The link works from either side.

In Docupace Next: Each party becomes a Related Contact, linked to the primary Contact with its relationship type. Account roles and Related Contacts are now separate.

Why it changed: A party is now a record, not a name on a folder. The same person can relate to more than one Contact, and their details are kept once instead of re-entered.

Work Management: Monitor

Impact: Low

In Connect: Monitor is the hub for reassigning tasks and for searching and filtering work.

How to get there: Open Work Items and pick a view. For bulk actions, select items in the table and choose an action from the menu.

In Docupace Next: The same tools live under Work Items, in the All Work Items, Active and Assigned to Me views.

Why it changed: Ready-made views help you find work faster and act on it in bulk from the same place.

SECTION 3, CONTINUED

Platform Administration

Impact: Low to medium

In Connect: Settings are spread across admin panel screens and edited record by record.

How to get there: Open Administration and choose a category.

In Docupace Next: One administration experience grouped into users, entitlements, features and integrations. Record-level control is still there underneath.

Why it changed: It's organized around what you're trying to do, so routine changes don't need a support or implementation request.

Table Column Configuration

Impact: Low

In Connect: Column layouts are set centrally in the Domain Attributes Order domain, not by users or firm administrators.

How to get there: Open a table's column settings, adjust the columns, then save for yourself or publish firm-wide.

In Docupace Next: All users can configure their own view of column layouts and filters. Firm admins with the right credentials can also save a layout for the whole firm.

Why it changed: Users see the fields they work with, in the order they use them, without a support request or release cycle. Defaults stay as they are until you change them.

SECTION 4

New Platform Capabilities

None of these exist in Connect. They're the biggest reasons to look forward to your upgrade.

Contact Reuse Across Accounts	Store a person or legal entity once as a Contact and reference it from every account it touches.	**Why it matters:** No more duplicate party records. Update an address or phone number once instead of in each folder.
Expanded Party Types	Capture Beneficiaries, Trusted Contacts, Authorized Individuals and other non-holder parties as Contacts through the Pershing and NFS wizards.	**Why it matters:** Party data is captured once and reused, which cuts rekeying and NIGO risk. Structured data supports Reg BI and senior-investor obligations.
Is Account Flag	Mark a sub-folder as an Account directly. In Connect, whether a sub-folder was an account depended on how it was set up.	**Why it matters:** Account-level reporting, entitlements and integrations behave predictably, and one sub-folder type serves both purposes.
Person and Legal Entity Records	Keep individuals and entities (trusts, corporations, partnerships) in separate records with their own fields.	**Why it matters:** Entity accounts no longer squeeze into a person-shaped record, which improves data quality and reduces cleanup.
Multi-Work-Item E-Signature Packets	Build one signing packet with documents from several work items, instead of one packet per work item.	**Why it matters:** Your client gets one email and signs once. That reduces abandonment on multi-account onboarding and consolidates e-signature transactions.

SECTION 5

Technology and Platform

These changes aren't on any one screen, but they shape what your firm and your vendors can build on Docupace and how integrations are delivered.

Public GraphQL API (REST remains)	Query and integrate against typed objects such as IContact, PersonContact, LegalEntityContact, IWorkItem, ContactWorkItem and DocumentTemplate. The developer portal documents each one, with a dictionary that maps Docupace domains to GraphQL types.	**Why it matters:** You and your vendors can build directly against Docupace data. Docupace plans and coordinates your move onto the new APIs and authentication as part of your upgrade.
Custom Domains and Attributes	Your custom domains and attributes carry forward. In Administration you can map a domain to its GraphQL type and add an attribute to a screen.	**Why it matters:** Your firm's data model comes with you, and admins can extend screens without a development change.
New Site URL (Action Needed)	Docupace Next uses a new site URL. Anything that references the current one needs updating before cutover: integrations, callbacks and webhooks, SSO and OAuth redirect URIs, allowlists, firewall rules, certificates, DNS records and vendor settings.	**Why it matters:** It's the one item with work on your side, and the one most likely to interrupt service if missed. Docupace works through a joint readiness plan with you.

SECTION 6

Integrations

Most of these integrations already exist in Connect, and USPS address standardization is the only new one. Elsewhere, the new features are inside integrations you already use, and they work without leaving Docupace. Docupace will publish setup and upgrade documentation for each integration.

Envestnet Enhanced	Search Envestnet for an existing Household, or add one, from within Docupace.	**Why it matters:** Household structure stays aligned in both systems instead of being maintained twice.
USPS Address Standardization New	Turn on address validation and standardization through the USPS APIs.	**Why it matters:** Addresses are checked as they're entered, which reduces NIGO from bad address data. It's optional.
Pershing and NFS Account Opening Wizards Enhanced	Open accounts through guided data capture built on standardized, centralized custodial integrations and current custodian APIs. Connect relied on custom widgets or a separate API for each site.	**Why it matters:** Data capture drives the process and the form comes out of it. Straight-through processing means fewer rekeying errors and steadier account opening.
CRM: Redtail, Wealthbox, Salesforce, PreciseFP Enhanced	SSO, Contact create and update, and starting a transaction carry forward. New: import contact data while creating a Contact or work item.	**Why it matters:** Your CRM stays the source of client data, and users start work in Docupace without switching screens.

SECTION 7

Retired Functionality

These are true retirements, with no Docupace Next equivalent and no other way to reach them. Moves and renames aren't retirements; you'll find those in Sections 1 and 3.

	WHAT IT DID IN CONNECT	DOCUPACE NEXT POSITION
Docupace Start	A low-code tool for building and deploying custom applications in the Docupace ecosystem.	Not carried forward. Docupace knows firms want to build their own data-collection screens, and a solution for this is being defined.
Single Pane of Glass (SPOG)	A configuration area for building custom UI from four tiles: Widgets, Interfaces, Menus and Event Handlers.	Not carried forward.
Shared Key Authentication	Clients could authenticate to Docupace with a Shared Key.	Not supported. Clients using a Shared Key move to Auth0 as part of the upgrade, sequenced with the site URL change.

