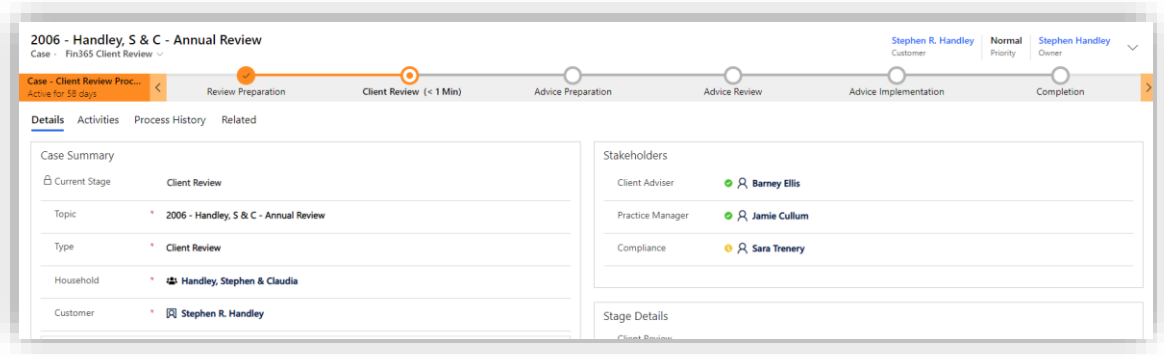
CRM Version 4.9 Release Notes

August 2020

The following improvements were made to Fin365's CRM solution in the v4.9.0.0 release

Client Review Management

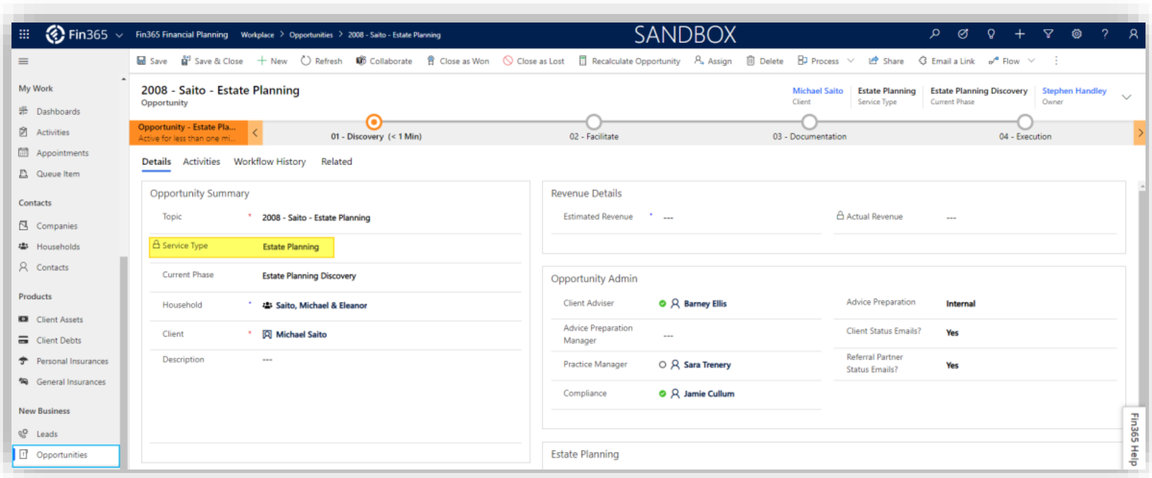
Fin365's client review automation and the client review process managed using Cases have been updated to provide significantly more flexibility with the way Client reviews are managed. Full details will be made available via our WalkMe Fin365 Support system.



Fin365 Client Review Case Process

(New Business) Estate Planning Process Flows

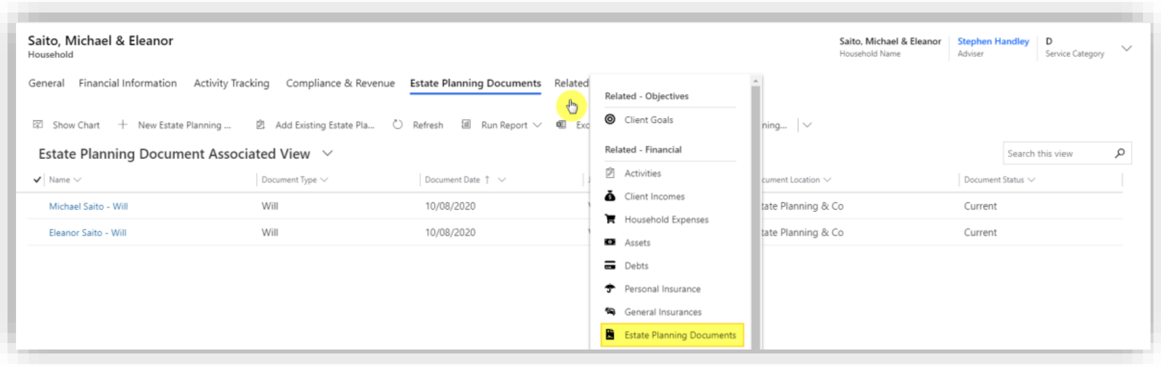
As an alternative to the standard Financial Planning process flow currently available in Leads/Opportunities, we have added a new Process Flow for Estate Planning. You can select this process flow using the Service Type when first creating a new Lead or Opportunity.



Fin365 Estate Planning Opportunity Process

Estate Planning Documents Entity

To coincide with our new Estate Planning advice process, we've also add the ability to store detailed information about your clients' estate planning documents.



Fin365 Estate Planning Documents

Referral Partner Recipient Created Tax Invoice

With an increasing number of customers developing referral arrangements, we've enhanced our referral partner remuneration reporting. You are now able to select any arbitrary date range, as well as choose to include/omit certain categories and types of revenue.