



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.

The screenshot shows the '2006 - Handley, S & C - Annual Review' case. The process flow is: Review Preparation (Active for 55 days) → Client Review (< 1 Min) → Advice Preparation → Advice Review → Advice Implementation → Completion. The current stage is 'Client Review'. The interface includes tabs for Details, Activities, Process History, and Related. The Case Summary shows: Current Stage: Client Review; Topic: 2006 - Handley, S & C - Annual Review; Type: Client Review; Household: Handley, Stephen & Claudia; Customer: Stephen R. Handley. Stakeholders listed are: Client Adviser: Barney Ellis; Practice Manager: Jamie Cullum; Compliance: Sara Trenery. Stage Details are also visible.

Fin365 Client Review Case Process

(New Business) Estate Planning Process Flows

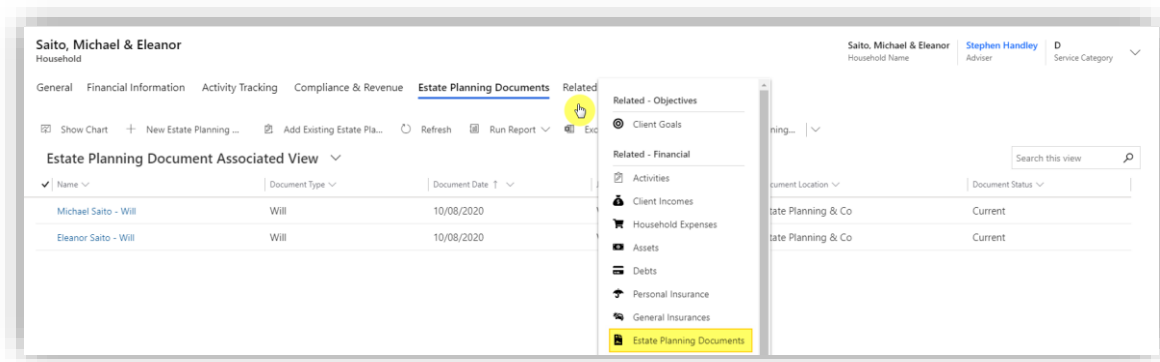
As an alternative to the standard Financial Planning process flow currently available in Leads/Opportunities, we have added a new Process Flow for Estate Planning. You can select this process flow using the Service Type when first creating a new Lead or Opportunity.

The screenshot shows the '2008 - Saito - Estate Planning' opportunity. The process flow is: 01 - Discovery (< 1 Min) → 02 - Facilitate → 03 - Documentation → 04 - Execution. The current phase is '01 - Discovery'. The interface includes tabs for Details, Activities, Workflow History, and Related. The Opportunity Summary shows: Topic: 2008 - Saito - Estate Planning; Service Type: Estate Planning; Current Phase: Estate Planning Discovery; Household: Saito, Michael & Eleanor; Client: Michael Saito; Description: ---. Revenue Details show: Estimated Revenue: ---; Actual Revenue: ---. Opportunity Admin shows: Client Adviser: Barney Ellis; Advice Preparation: Internal; Advice Preparation Manager: ---; Client Status Emails?: Yes; Practice Manager: Sara Trenery; Referral Partner Status Emails?: Yes; Compliance: Jamie Cullum. The left sidebar shows the navigation menu with 'Opportunities' selected.

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.

