

2020 Quarantine Quarter Release Notes

October 2020

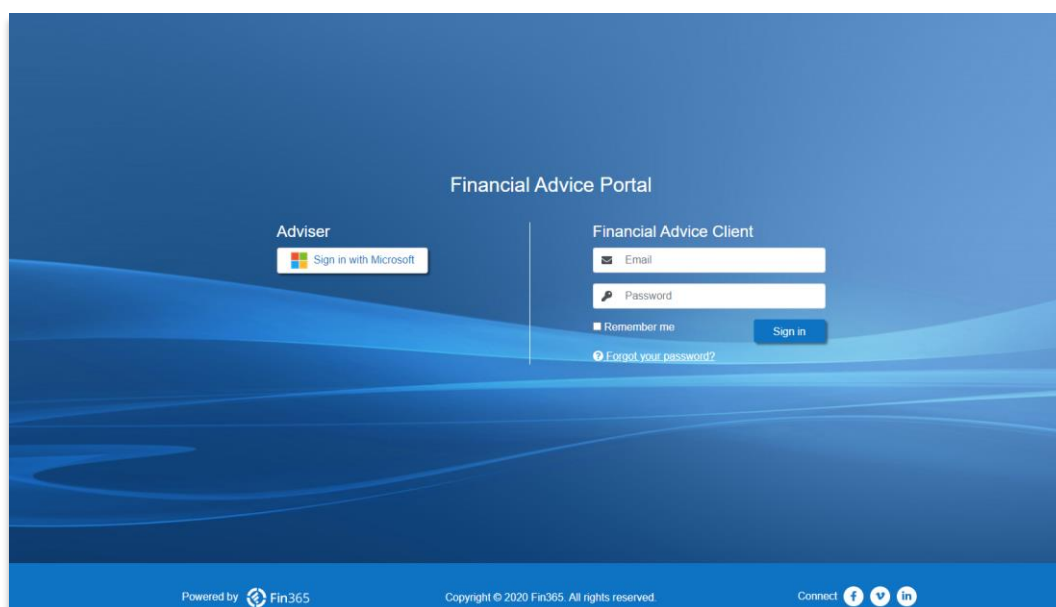
Portal restumping

In order to ensure Fin365 is always taking advantage of the latest technology, we have undertaken a complete rewrite of the Angular JS foundation that underpins the Web Portal. Benefits of this upgraded framework include:

- Improved speed/performance
- Enhanced support for mobile devices

While you likely won't notice too much difference at this point in time. These benefits will become more noticeable in coming releases.

One change you should notice is the improved login page, which is designed to remove confusion about which login path to choose.



Fin365 Updated Client Portal Landing Page

Market data provider change

Another foundational change we've made is a switch from Morningstar to FE Fund Info. Similar to Morningstar, [FE FundInfo](#) is a global provider of market data. The benefits we've picked up by moving to FE FundInfo include:

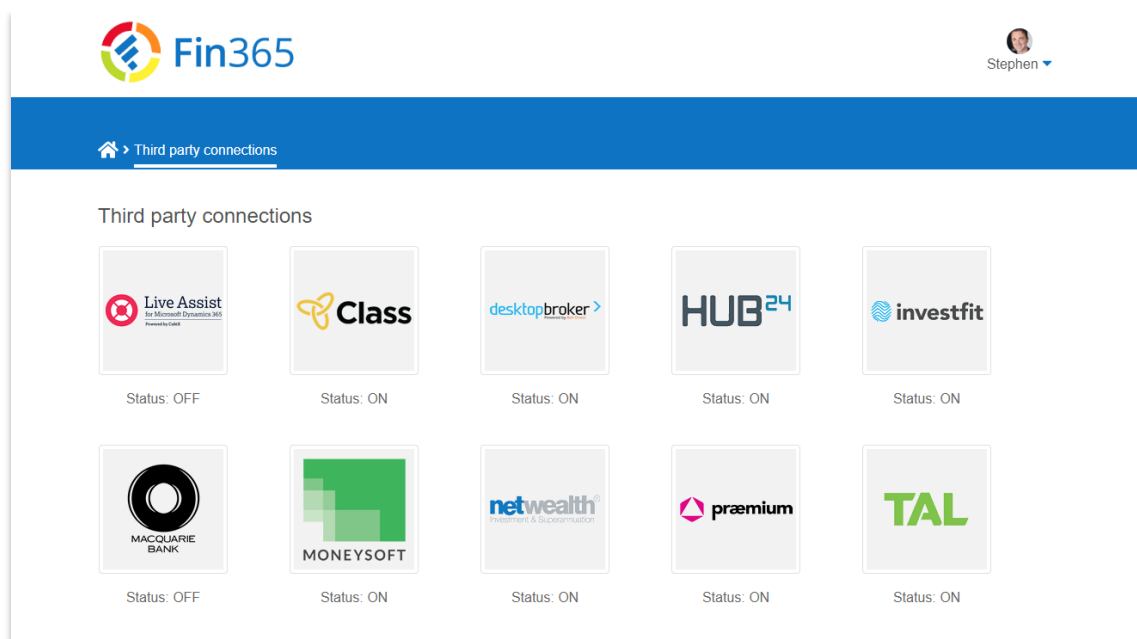
- Asset allocation reporting on ETFs to feed our (coming soon) enhanced portfolio reporting
- The additional of New Zealand and South African market data, to provide similar benefits to our growing customer numbers in these regions.

While the switch to Morningstar to FE FundInfo went VERY smoothly, the way they report their data does have slight differences. So for customers who are more focused on investment holdings, please let us know if you notice any anomalies in unit prices or asset allocation data.

Data feed updates

Data feed connections continue to be one of Fin365's highest priority. The efficiency gains delivered by the automated upkeep of CRM records is immense. One thing we haven't been all that good at, however, is communicating our progress.

The image below shows feeds now supported. Even if you only have a few accounts/policies with these providers, we highly recommend connecting the feeds to automate the upkeep of these records in the CRM.



Fin365 Third Party Connections

Coming Soon

The following data feeds are on the roadmap.

- Sharesight
- Zurich Insurance
- MLC Insurance

Timeframe in most cases is being dictated by the product providers, most of whom have been significantly impacted by COVID. But we'll keep pushing as hard as we can.

We have also started exploring alternative methods to broaden the feeds we can offer. Early stages, but we're quietly confident we'll soon be announcing the addition of some very well-known platforms to our data feed menu.

Fin365 CRM Updates

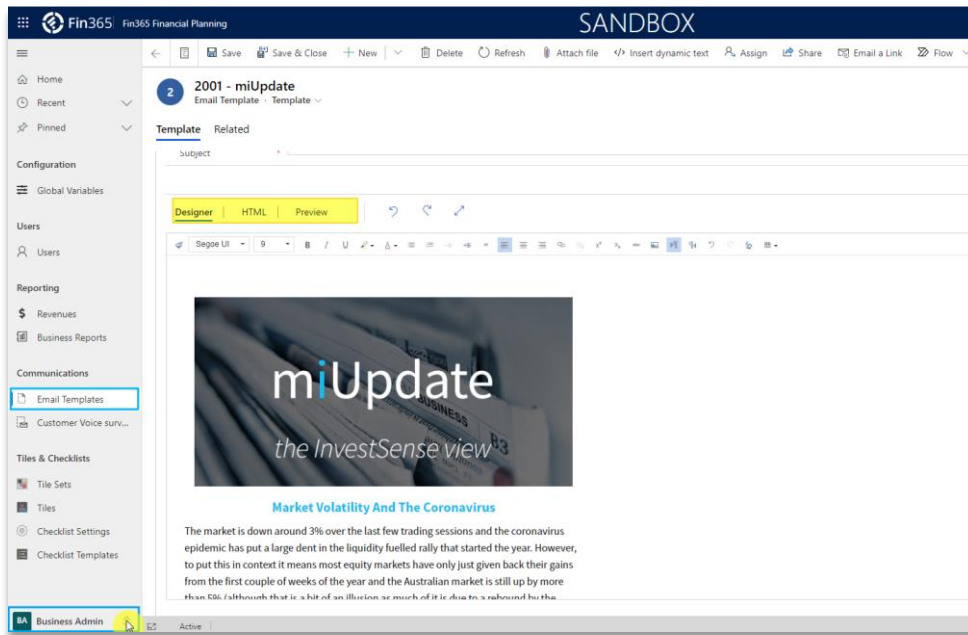
To align with these Poral updates, we've also released some updates to our CRM. [Details can be found here](#)

Microsoft Dynamics CRM Updates

Microsoft is in the process of rolling out their Wave 2 updates for 2020. The following enhancements are our favourites.

Email Templates

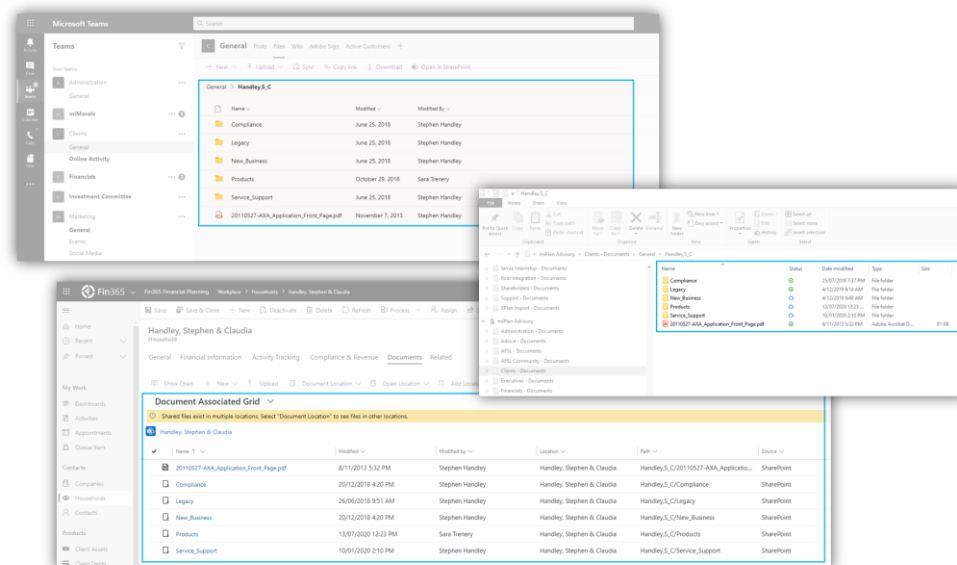
One of the most useful enhancements in the latest release is the much-improved editing capabilities for Email Templates. You can now paste HTML code directly into the Dynamics template editor and preview the resulting email for different device types.



Dynamics 365 Email Template Enhancements

Teams/SharePoint Library Integration

While SharePoint Documents integration has been possible in Dynamics CRM for some time, the setup process was broken for newer Teams based SharePoint libraries. This has now been fixed so it is possible to expose a Microsoft Teams document library in Dynamics CRM.



Dynamics 365 Teams/SharePoint integration

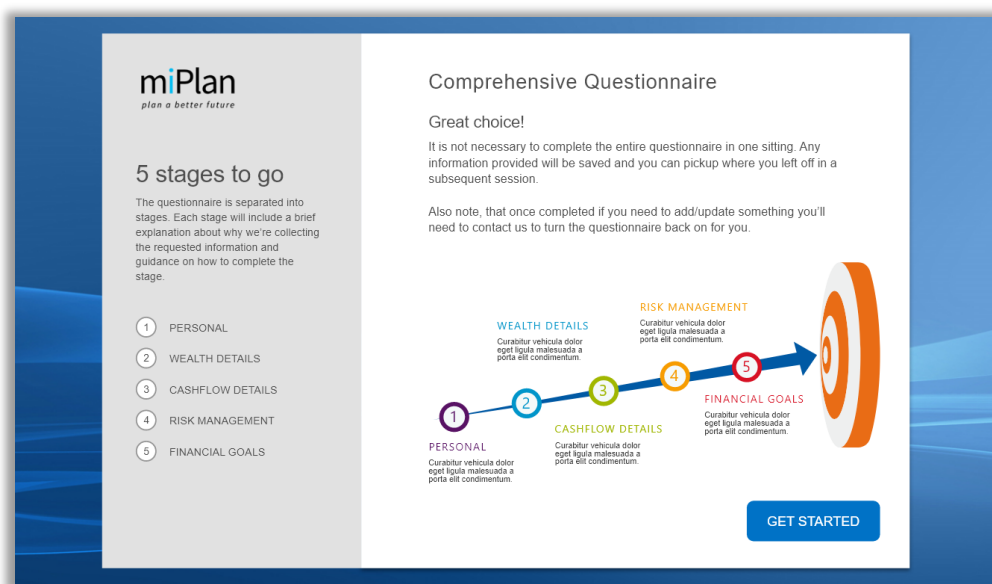
On the Fin365 horizon

As Fin365's customer base has grown, and diversified into different industries/regions, we've received lots of great feedback on ways to improve the value Fin365 delivers and are already back at work on a number of significant enhancements. Here's what's on the horizon ...

Client Onboarding (Online Fact Find) Enhancements

Targeted for the final release of 2020, we've listened to your feedback and undertaken some major improvements to our Client Onboarding feature. Enhancements include:

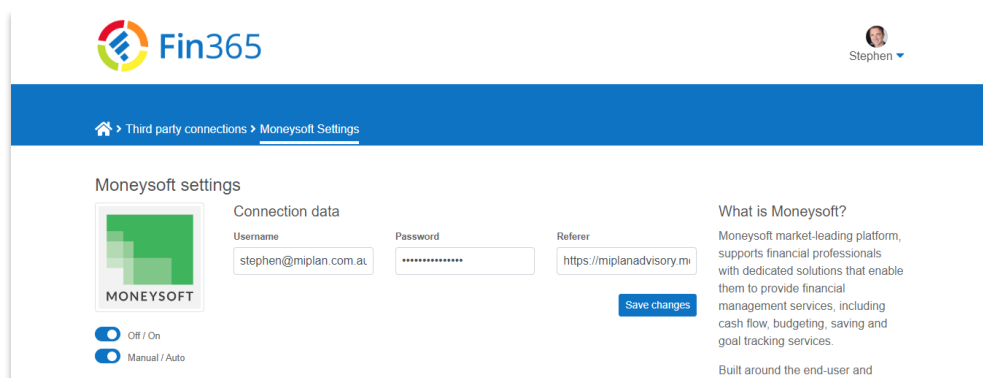
- Comprehensive/Basic mode
- Improved user interface and guidance
- Collection of Estate Planning information
- The ability for clients to add additional information to Client Goals



Fin365 Client Onboarding

Moneysoft Licence Distribution + Enhancements

Fin365 recently signed a distribution agreement with Moneysoft. We've also made some enhancements to the integration which allows customers to use Moneysoft without needing to commit to their standard business account. Once we roll out these improvements, you'll be able to start with just a single client/licence.



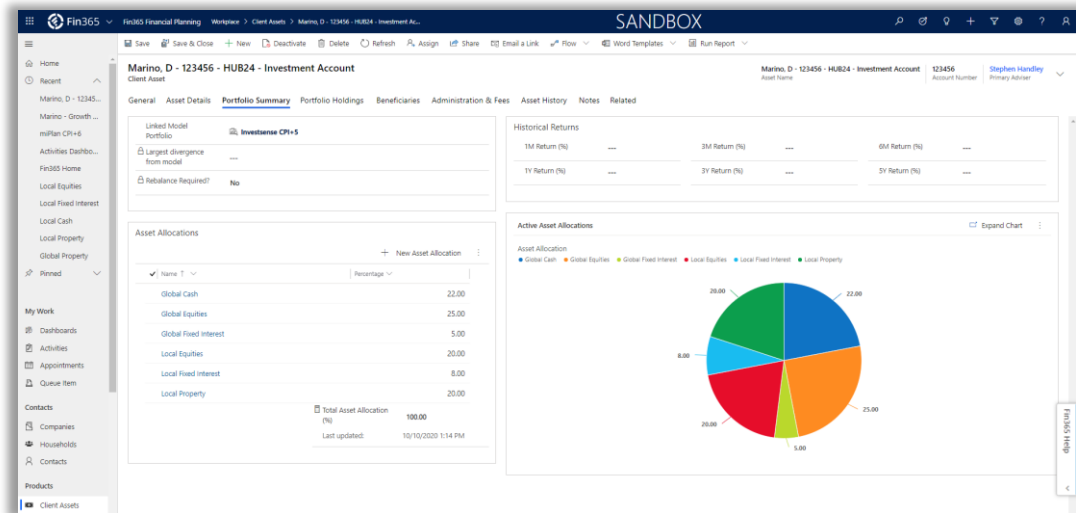
Fin365 Moneysoft Enhancements

Enhanced Portfolio Reporting

With an increasing number of data feeds connections coming online, the time is right to turn our attention to enhancing Fin365's portfolio administration and reporting capabilities.

In the next release of our CRM we will add the following features:

- Grouping of client accounts into Investment Buckets
- Linking of Investment Buckets to Model Asset Allocations
- Linking of Client Assets to Model Portfolios
- Monitoring of adherence to asset allocation tolerances
- Support for IRR data (with automated calculations soon to follow)



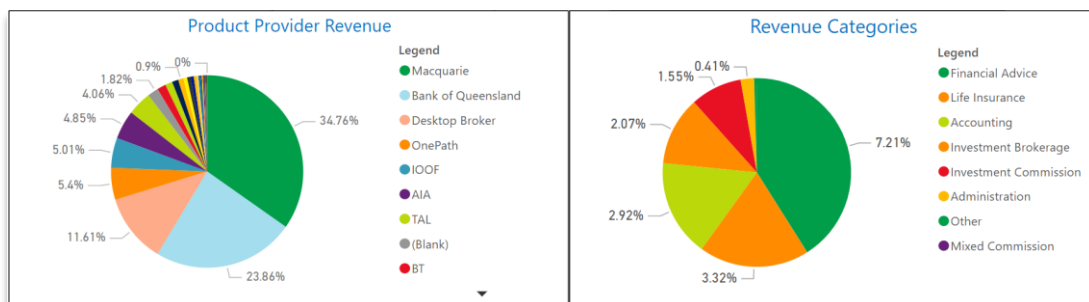
Fin365 Investment Portfolio Enhancements

Automated Currency Conversion Rates

An increasing number of our customers are starting to access investment instruments in multiple currencies. While Dynamics CRM already supports multi-currency records, there is no automatic update of exchange rates. Fin365 will soon add support for automatic creation of all currency records and daily updates of exchange rates within those records.

Revenue Management Enhancements

When first designed, our revenue management system assumed a single Revenue Category per Client Account. Consolidation of services and a push toward direct billing of clients has resulted in an increasing number of customers receiving revenue of multiple categories from a single account (e.g. Macquarie CMA). To more efficiently accommodate this need, our revenue system is being enhanced to allow the revenue category to be individually specified for each transaction.



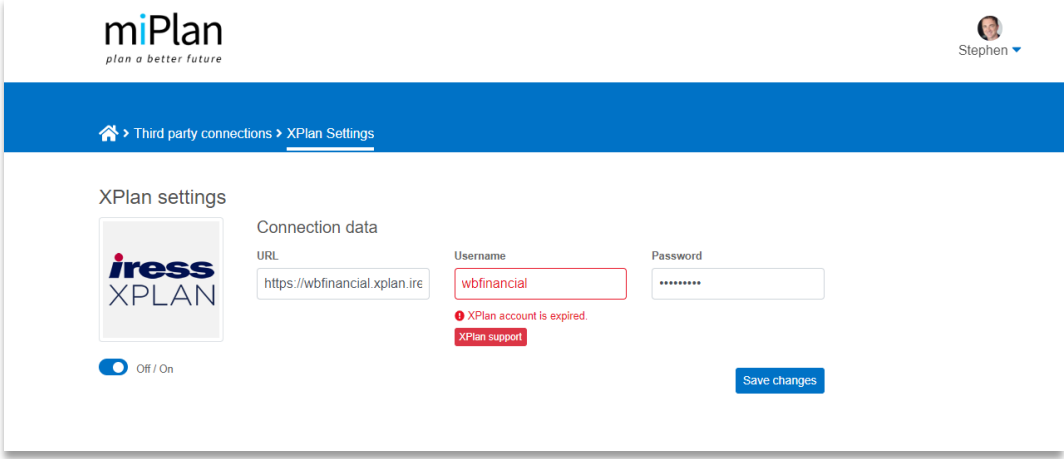
Fin365 Revenue Management Enhancements

Xplan Integration

In the early stages of FinPal Fin365, one of the common questions from businesses exploring new software systems was *"When will you replace Xplan?"*. Some of you may remember our answer to that question was to show you a slide of an ecosystem and (attempt) to explain that a Xplan's closed approach was flawed and that one of the key reasons we chose Microsoft Dynamics was to create maximum business efficiency by enabling flow of data between Fin365 and other systems.

It seems our message also resonated with Iress, who recently launched the Iress Open API and invited us to connect our systems.

Version 1.0 of the integration will enable Xplan client data to be seeded from the Fin365 CRM for modelling/research purposes. As Iress rolls out enhancements to the API we'll enable additional scenarios.



The screenshot displays the 'miPlan' interface with the 'XPlan Settings' page. The breadcrumb trail indicates 'Third party connections > XPlan Settings'. The 'XPlan settings' section features the 'iress XPLAN' logo and a toggle switch currently set to 'Off / On'. Under 'Connection data', the 'URL' field contains 'https://wbfinancial.xplan.ire', the 'Username' field contains 'wbfinancial', and the 'Password' field is masked. A red error message indicates 'XPlan account is expired.' with a link to 'XPlan support'. A 'Save changes' button is located at the bottom right.

Fin365 Xplan Integration

Other 3rd Party Integrations

Fin365 is currently working with the following partners on integrations. The bulk of the work, and therefore the timeframe, for these integrations is in the hands of the third party.



Roar (formally YTML) is an Advice Technology marketplace connecting advisers to systems such as Astute Wheel, Omnium, Chant West, etc



Financial Mappers is a cloud based modelling tool that calculates and reveals the numbers you need to see, in order to make your best decisions for future investing, retirement planning, or retirement cash flow management.