CRM Version 5.5.0.0 Release Notes

June 2021

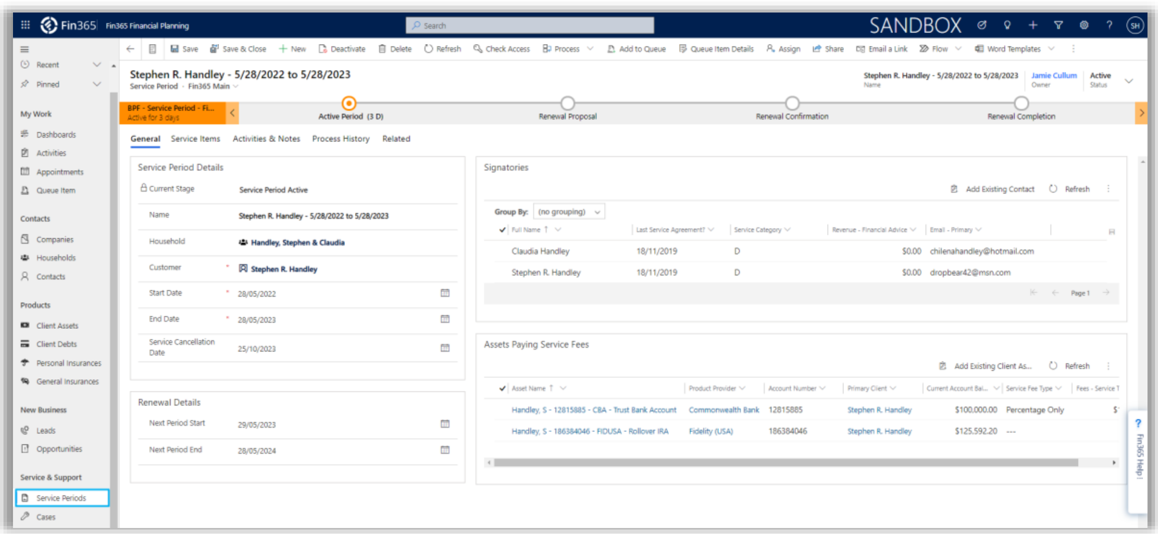
Welcome to Fin365 CRM v5.2.0.0. This release is a major release with some new features, as well as improvements to existing features.

Just a reminder that all new features can be found in the Fin365 standard applications. Any customers with customised applications may not see them without further customisation work.

New Features

Service Periods

A new Service Period entity has been added to help customers manage recurring service periods covered by a corresponding agreement. While it has been added in response to the new annual service obligations for Australian based financial planners, it has been designed to have application across other disciplines and in other geographies. A full training video on this new feature will be added to the Fin365 Help tool in the CRM Application.



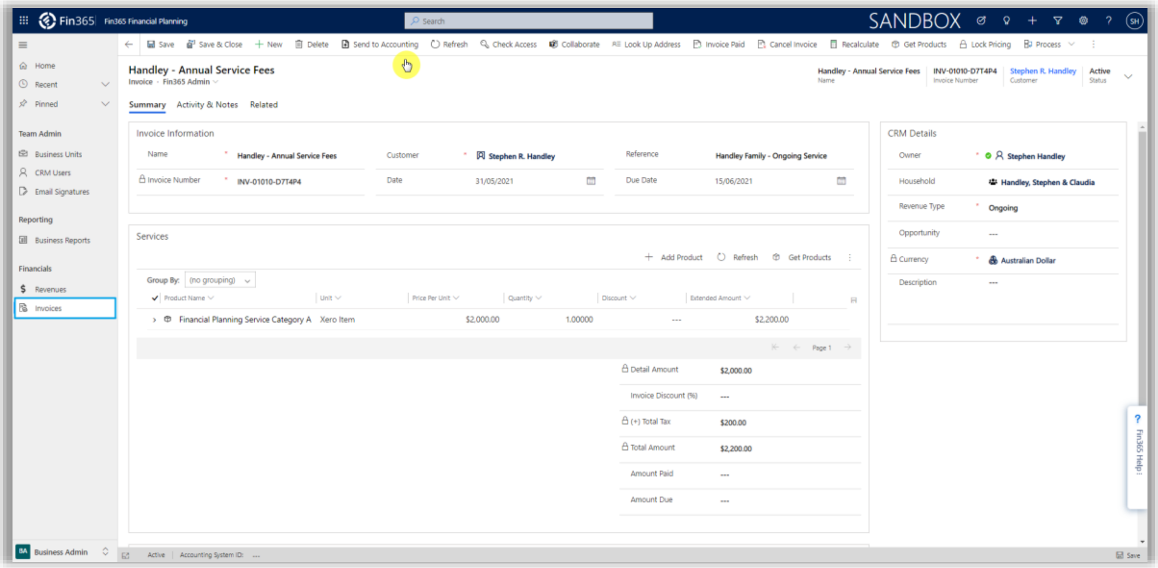
Fin365 Service Periods

Xero Integration Features

Invoices

To coincide with the release of our integration with the Xero Accounting system, we have added several enhancements to Microsoft's standard Invoicing capabilities with the CRM.

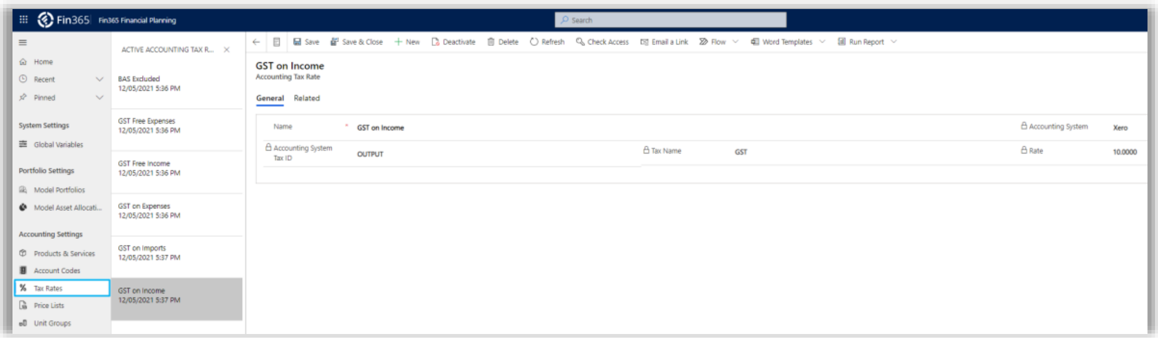
Invoices created in the CRM will automatically sync to Xero (and vice versa) on a daily basis or can be manually pushed.



Fin365 Service Periods

Tax Rates

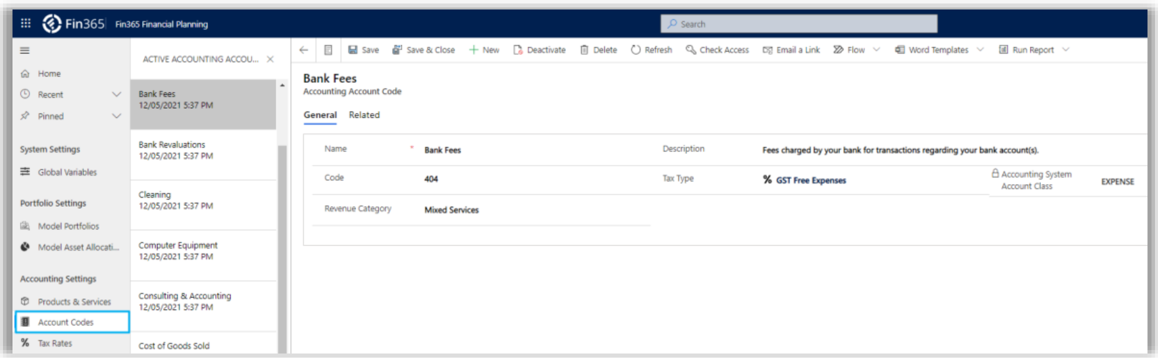
A new Tax Rate entity has been created to store Xero Tax Rates for use with Services & Invoices.



Fin365 Tax Rates

Account Codes

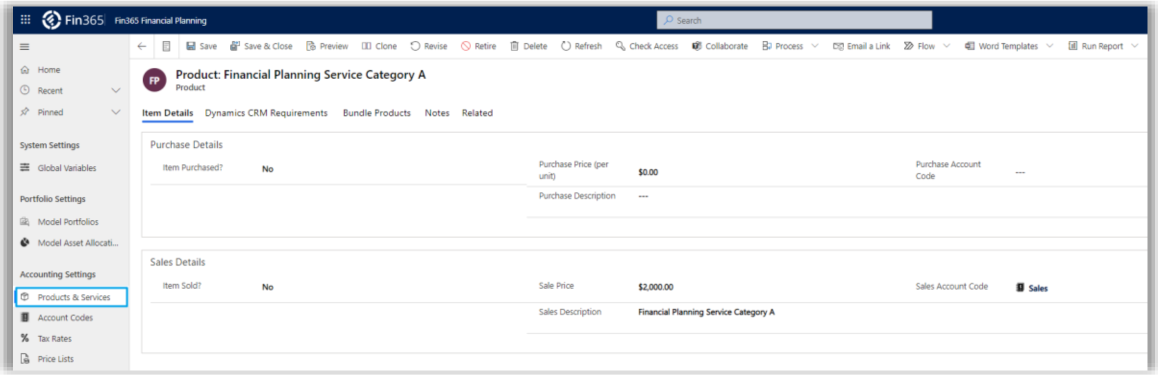
A new Account Code entity has been created to store Xero General Ledger information for use with Services & Invoices.



Fin365 Account Codes

Products & Services

The Products entity in Dynamics has been extended to enable a catalogue of Services and Service bundles to be stored for use in Invoices and Service Periods

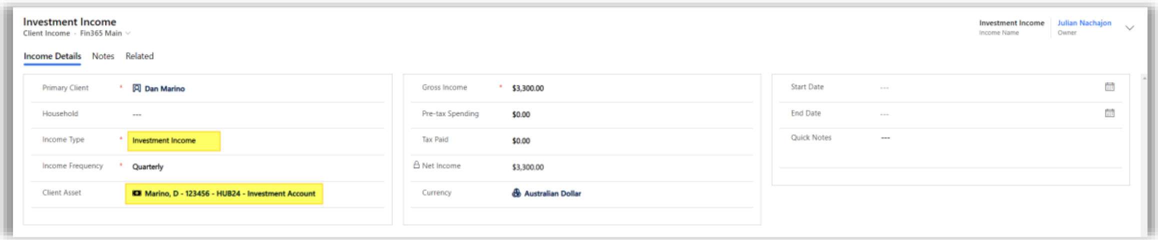


Fin365 Products & Services

Feature Enhancements

Linking of (investment) Income Records to Client Assets

Historically client investment income has been captured directly within the associated Client Asset record. To provide a consolidated view of all client incomes, it is now possible to create a Client Income record and link it to the associated Client Asset from which the income will be drawn.



Fin365 Client Income connected to Client Asset

Revenue Entity Changes

In this release we have added the ability to connect Revenue records to either a Contact or a Company record. Revenues connected to Companies (e.g. Family Trust) will not aggregate up to the client Household record. In a future release, we will add Revenue Aggregation to the Company record to more detailed revenue reporting can be generated for business/trust/SMSF customers.

Auto-Populate Lead fields when connected to existing Companies/Contacts

On occasion you may want to create a Lead and connect it to an existing Contact or Company. By default, Dynamics does not auto-populate key Lead fields (e.g., First Name, Last Name) which can cause issues with System Views. To work around this limitation, we have created a workflow that will copy these fields. The feature can be turned on using the Lead - Copy existing customer data global variable.

Form Changes

Entity	Field(s)	Change/Purpose
Tasks	Quick Create Form	Added Category Sub-Category fields to improve efficiency of creating Tasks

Field Changes

Entity	Field(s)	Change/Purpose
Connections	Grandparent and Grandchild roles	We have added new roles to allow Contacts to be linked as Grandparent and Grandchild
Connections	Non-Dependant Child	A new connection to enable linking of adult children to their parents Households in a way that won't conflict if they're also clients with their own Household
Contact	Special Needs?	Yes/No field to identify Clients with special needs
Contact	Special Needs Details	Exposed if Special Needs? = Yes and allows you to capture additional detail
Opportunity	Assets Under Advice	A generic field to capture information about value of assets included in this advice

View Changes

Entity	Field(s)	Change/Purpose
Household	Data Integrity View	A new view to help with data clean-up
Contacts	Data Integrity View	A new view to help with data clean-up
Companies	Data Integrity View	A new view to help with data clean-up
Client Assets	Data Integrity View	A new view to help with data clean-up
Client Debts	Data Integrity View	A new view to help with data clean-up
Personal Insurance	Data Integrity View	A new view to help with data clean-up
Insurance Benefits	Data Integrity View	A new view to help with data clean-up. Available via the Advanced Find feature.
Client Incomes	Data Integrity View	A new view to help with data clean-up. Available via the Advanced Find feature.
Client Expenses	Data Integrity View	A new view to help with data clean-up. Available via the Advanced Find feature.
Client Goals	Data Integrity View	A new view to help with data clean-up. Available via the Advanced Find feature.
Estate Planning Documents	Data Integrity View	A new view to help with data clean-up. Available via the Advanced Find feature.
Appointments	Data Integrity View	A new view to help with data clean-up
Tasks	Data Integrity View	A new view to help with data clean-up
Phone Calls	Data Integrity View	A new view to help with data clean-up