



CRM Version 5.7.0.0 Release Notes

October 2021

Welcome to Fin365 CRM v5.7.0.0. 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

Revenue Management

Tracking of Revenue for Company Customers

It is now possible to attach Revenue records directly to Company customers rather than Contacts/Households.

Date	Revenue Type	Revenue Category	AFSL Revenue	AFSL Tax	Total AFSL Revenue	Adviser %	Product Provider
15/09/2021	Ongoing	Mixed Services	\$3,856.60	\$385.66	\$4,242.26		
15/08/2021	Ongoing	Mixed Services	\$3,856.60	\$385.66	\$4,242.26		
15/07/2021	Ongoing	Mixed Services	\$3,856.60	\$385.66	\$4,242.26		

Fin365 Attaching Revenues to Companies

365 Days vs 12 Calendar Months

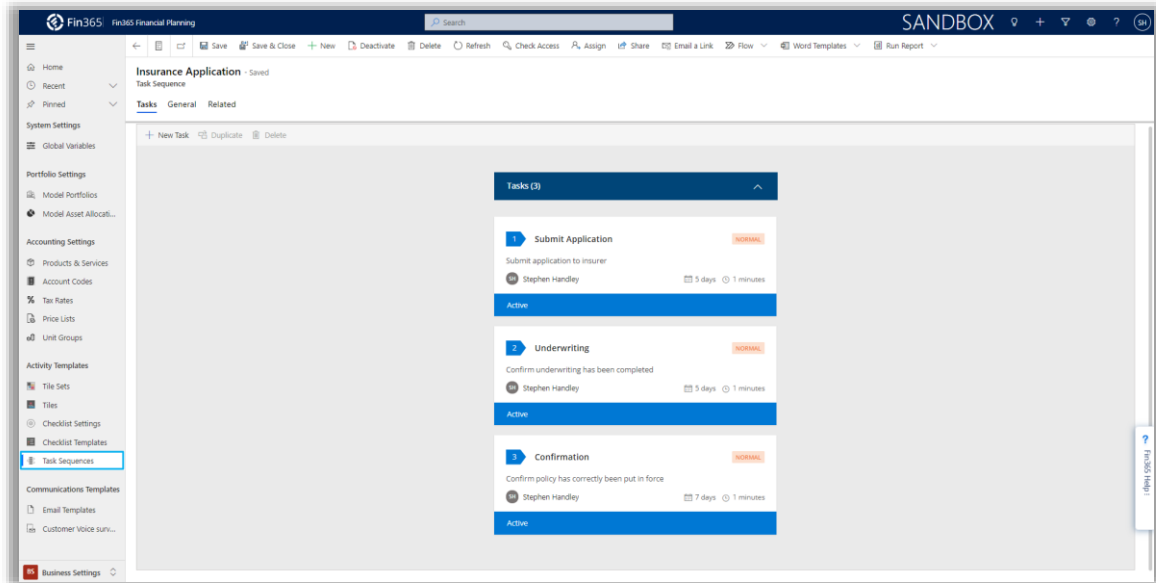
To improve the accuracy of historical revenue reporting, especially when there are delays in importing revenue records, we have added a new Global Variable switch that allows you to select between previous 365 days or previous 12 calendar months for revenue aggregation calculations.

Name	Owner	Value Type	Switch	Description
Revenue 12 Month Summary - Use Calendar Months	Stephen Handley	Switch	On	If this switch is On Fin365 will sum Revenue record dated in the previous 12 calendar months. I.e. Revenue imported in the current month will not be included. If this switch is Off Fin365 will sum Revenue Records dated within the past 365 days.

Fin365 Revenue Calculation Global Variable

Task Sequences

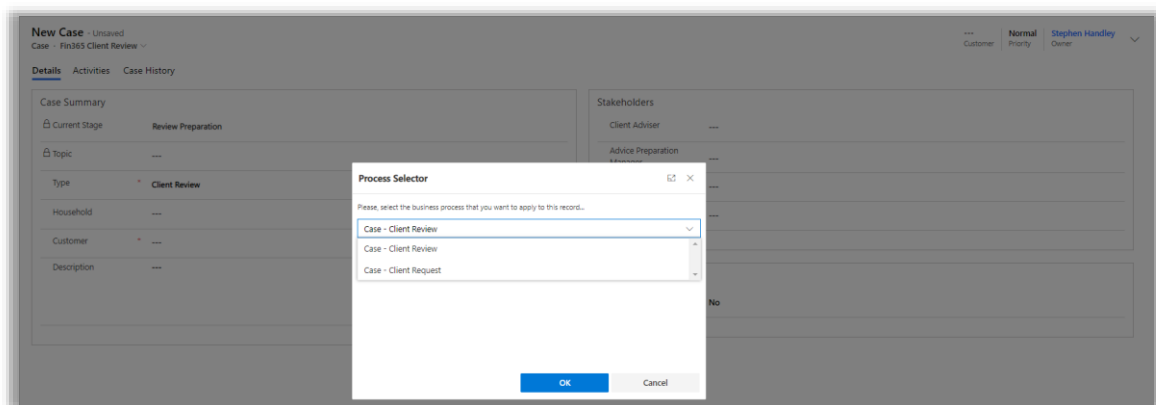
Task Sequences enable the construction of a sequence of templated Task Steps for quick/easy application of common workflows (e.g. new account/policy applications within an Opportunity)



Fin365 Task Sequences

(Workflow) Process Selector

By default, Dynamics CRM always applies the top ranked process flow in an Application. Switching to a different process flow then requires a few extra steps. Because it is increasingly common that Fin365 customers use multiple process flows (e.g. Client Review, Client Request, Insurance Claim, Centrelink Update, Complaint, etc), our new Process Selector makes it easier for customers to choose the relevant Process Flow at creation. This process flow selector is form specific (i.e. if you have custom forms for Leads, Opportunities, Cases) these forms will need to be updated for this feature to work.



Fin365 (Workflow) Process Selector

Automatic Currency/Exchange Rate updates

Fin365 is now pulling currency data from [Fixer](#). Currency records in Fin365 CRM are updated with exchange rate data on a daily basis, meaning foreign investments will always reflect an accurate local currency value.

Currencies					
View: Active Currencies					
New [Icons] Run Workflow... Start Dialog More Actions					
<input type="checkbox"/>	Currency Name	Currency Code	Currency Sym...	Exchange Rate ↑	Currency Precisio...
	Pound Sterling	GBP	£	0.5439920000	2
	Euro	EUR	€	0.6454150000	2
	Swiss Franc	CHF	CHF	0.6888850000	2
	US Dollar	USD	\$	0.7495580000	2
	Canadian Dollar	CAD	\$	0.9272520000	2
	Australian Dollar	AUD	\$	1.0000000000	2
	New Zealand Dollar	NZD	\$	1.0458820000	2
	Chinese Renminbi	CNY	¥	4.7865270000	2

Fin365 Automatic Exchange Rate Updates

Case Naming Convention

A new **Global Variable** switch has been added to enable auto-naming of Cases. If on Case Name will be of the format **YMM – Customer Name – Case Type**.

Fin365 Financial Planning			
Case - Auto Name Creation			
Global Variable - Fin365 Main			
General Related			
Name	Case - Auto Name Creation	Description	If On, Cases will be named with the following convention: YMM - <Customer Name> - <Case Type>
Owner	Julian Nachajon		
Value Type	Switch		
Switch	On		

Fin365 Case Auto Naming Convention

Feature Enhancements

Public Investments from multiple geographies

Enhancements have been made to our Public Investments connector to facilitate data feeds in multiple geographies.

<input type="checkbox"/>	Name	Currency Id	Day End Clos...	Data Source Info
	Booster KiwiSaver Shielded Growth Fund	NZD	1.39490	Booster
	Booster KiwiSaver Asset Class Balanced Fund	NZD	1.26800	Booster
	Booster KiwiSaver High Growth Fund	NZD	2.33070	Booster
	Booster KiwiSaver Geared Growth Fund	NZD	3.57160	Booster
	Booster SuperScheme Growth	NZD	1.67180	Booster

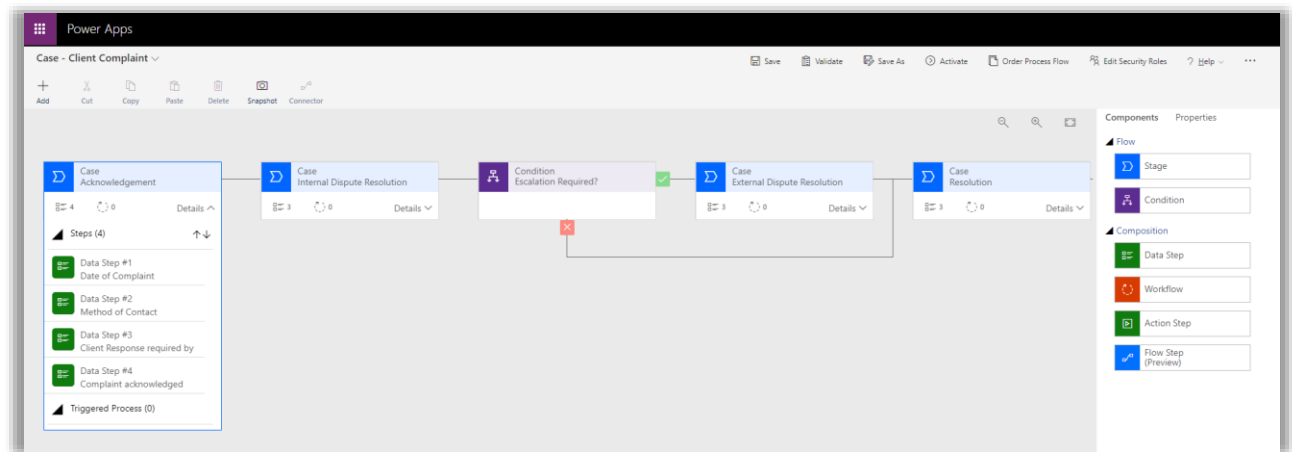
Fin365 Public Investment Data

Coming Soon to Fin365 CRM

Lots more in the works, but below are some of the features we have planned for our next release

New Cases Process Flows

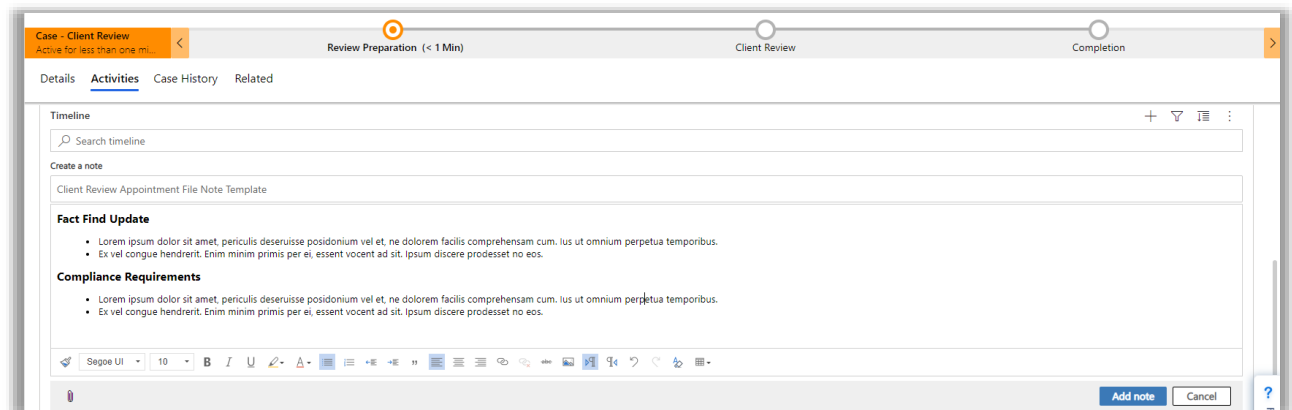
In the next release we will be adding a number of new core process flows, including Client Complaint and Insurance Claim.



Fin365 New Process Flows

Note Templates

We are planning to add the ability to create templates to improve the efficiency of creating File Notes using the standard Dynamics CRM Note entity



Fin365 Notes Template