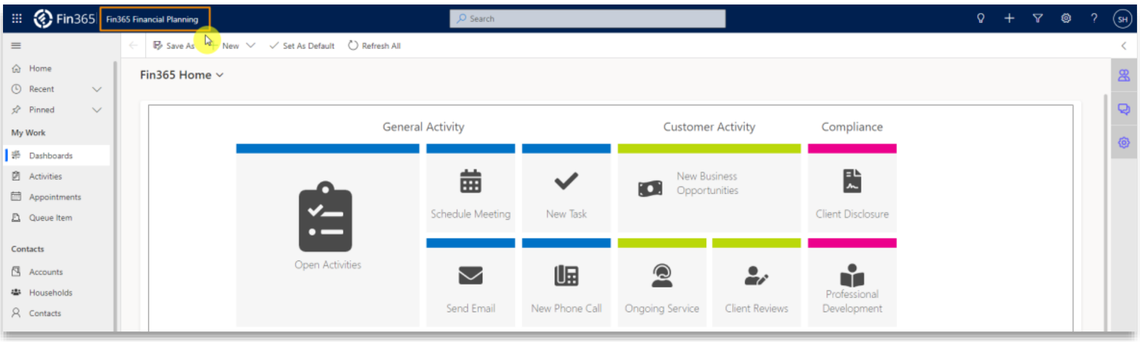
CRM Version 6.0 Release Notes

April 2022

Welcome to Fin365 CRM v6.0. This release is a major release packed with new features and improvements to existing features.

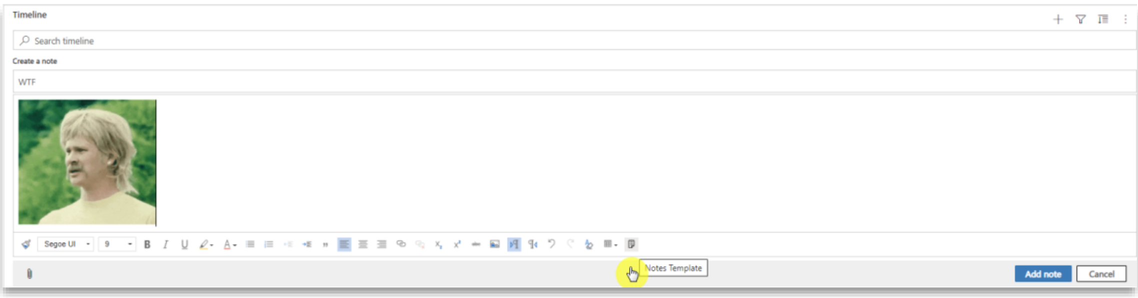
Just a reminder that all new features can be found in the Fin365 standard applications. Any customers with customised applications may not see them without further customisation work.

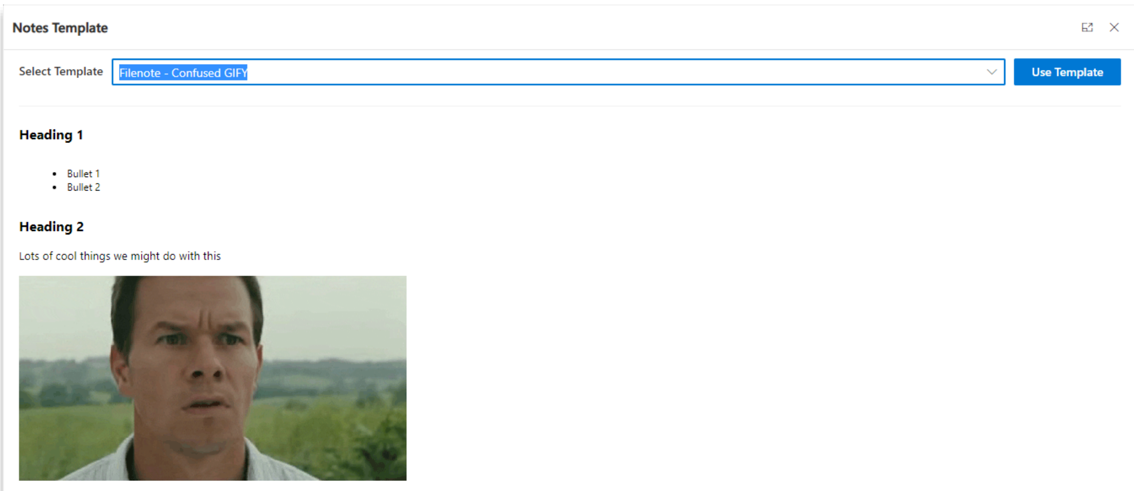


New Features

Note Templates

We know this one is going to make a lot of people happy. It's now possible to construct Note templates that can be quickly added to the Dynamics CRM Note entity.

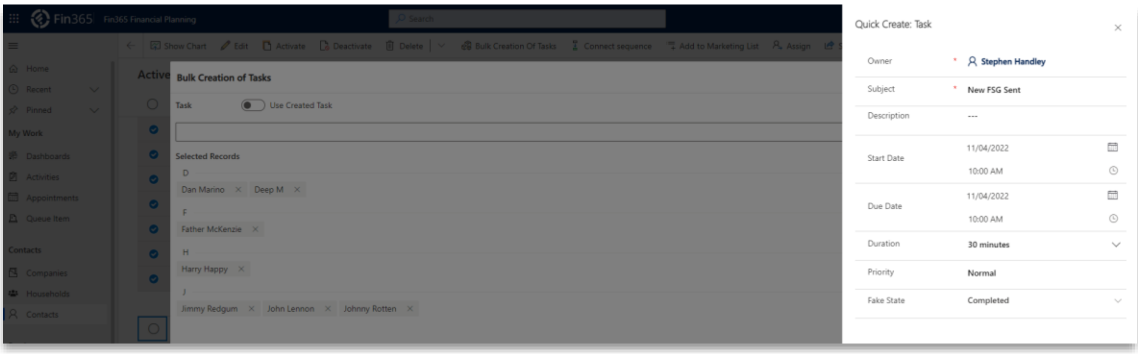




Fin365 Note Templates

Bulk Task Creation

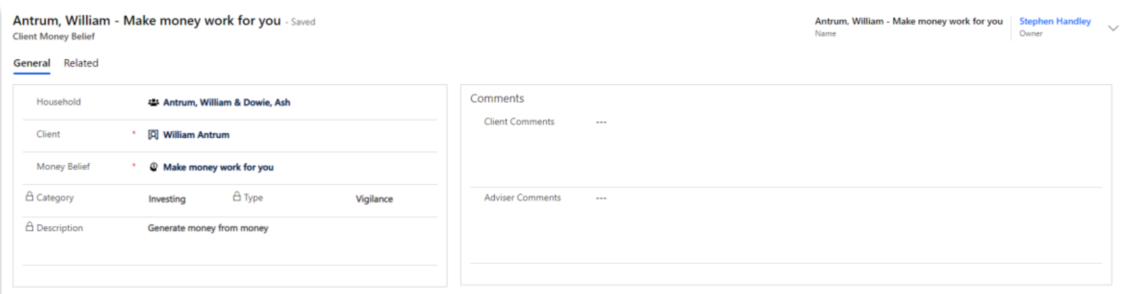
Another much requested feature. You can now bulk create an individual Task or kick-off a Task Sequence for multiple Household, Contact or Company records.



Fin365 Bulk Task Creation

Money Beliefs/Motivators/Values/Emotions

We've heard them referred to as Money Beliefs, Money Motivators, Money Emotions & Money Values. Essentially there a way to capture the way you clients' feel about money.



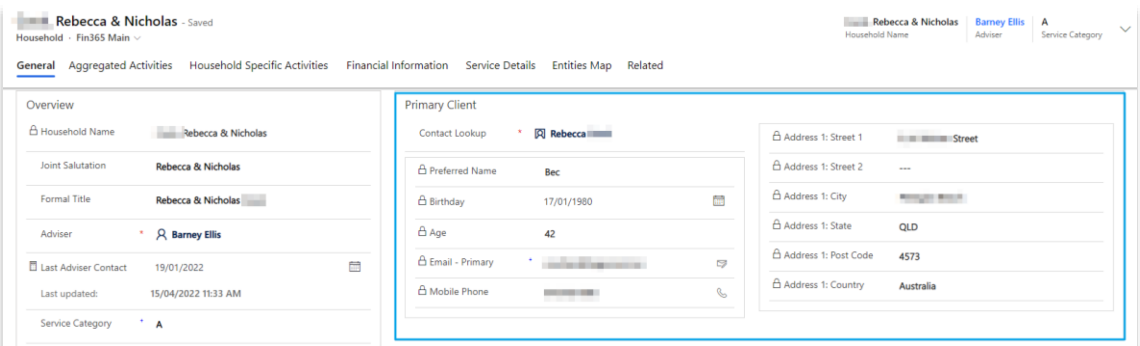
Fin365 Money Beliefs

Enhanced Features

Household Entity Improvements

Primary Client info on Household form

To reduce the need to click into the Contact record, it's now possible to view basic details about the Household's Primary Contact directly on the Household form.

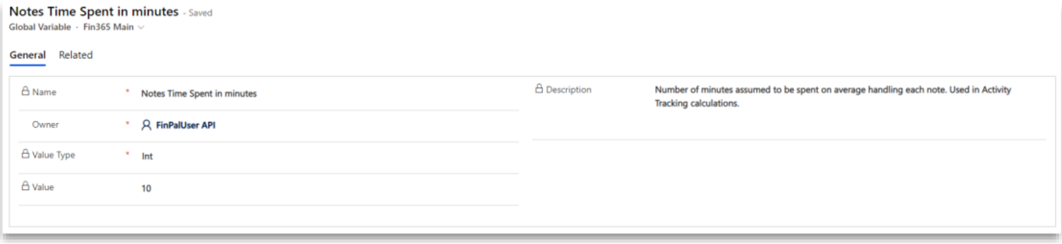


Primary Client details on Household form

Household 12-month Activity Details

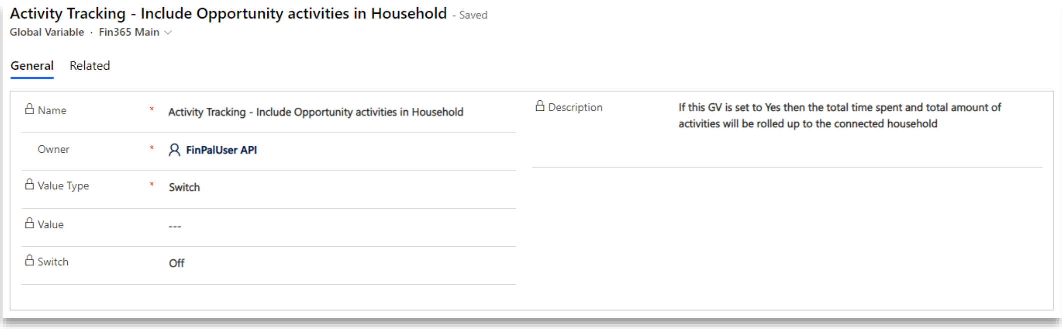
Fin365's 12-month rollup of activities on the Household has been enhanced as follows:

- Notes records connected directly to the Household or related records are now included. Time allocated to each Note is set using the Notes Time Spent in minutes global variable.



Notes Time Spent in minutes global variable

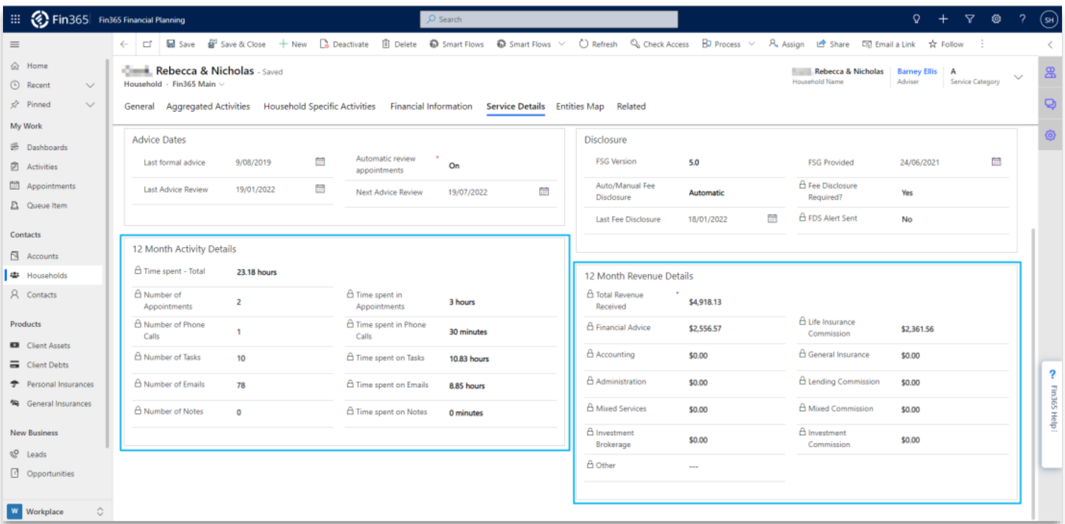
- Time spent on Activities attached to (Regarding) a Service Period are now included
- Historically Activities connected to an Opportunity were not included in the 12-month activity metrics on the Household, because those Activities were connected to Upfront/New Business revenue. In this release we've added the ability to include Activities connected to an Opportunity in the Household Activities Tracking metrics by setting the Activity Tracking - Include Opportunity activities in Household global variable.



Include Opportunity activities in Household global variable

Household 12-month Revenue details

Similar to the ability to include New Business activities in the Household activity tracking, it is now possible to include Upfront revenue in the Household revenue tracking by switching the Revenue Tracking - Include Upfront revenue in Household global variable is to On.



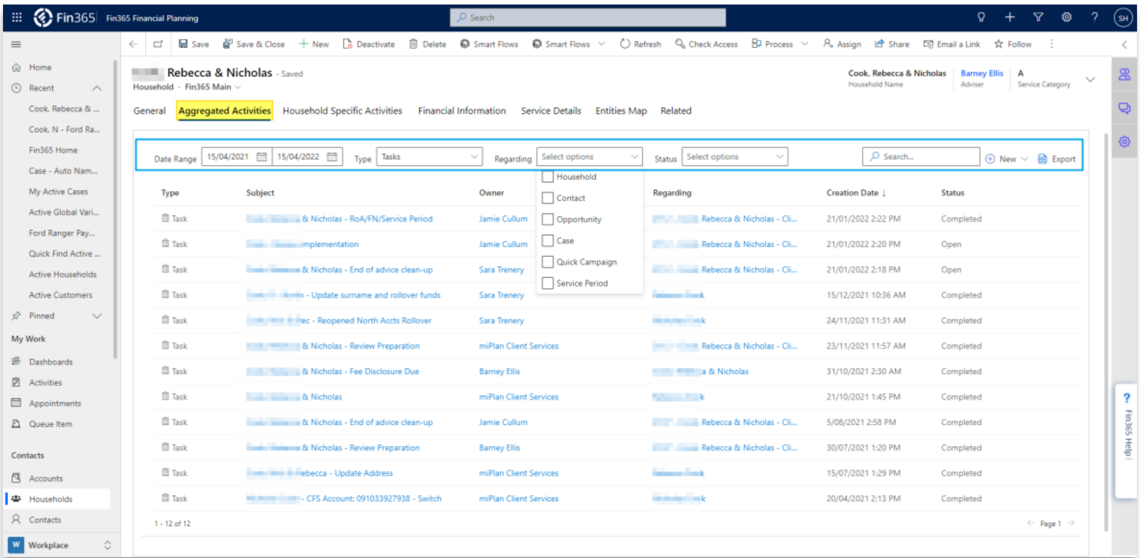
Household 12-month Activity and Revenue tracking

Household Aggregated Activities

Fin365's **Aggregated Activities** feature provides a central view of Activities related to a Household regardless of whether those Activities are connected directly to (**Regarding**) the Household or to a related record such as a Contact, Opportunity, Case, etc. The Aggregated Activities view can be found on Fin365's main Household form.

In this release we've added the following improvements to the Aggregated Activities feature:

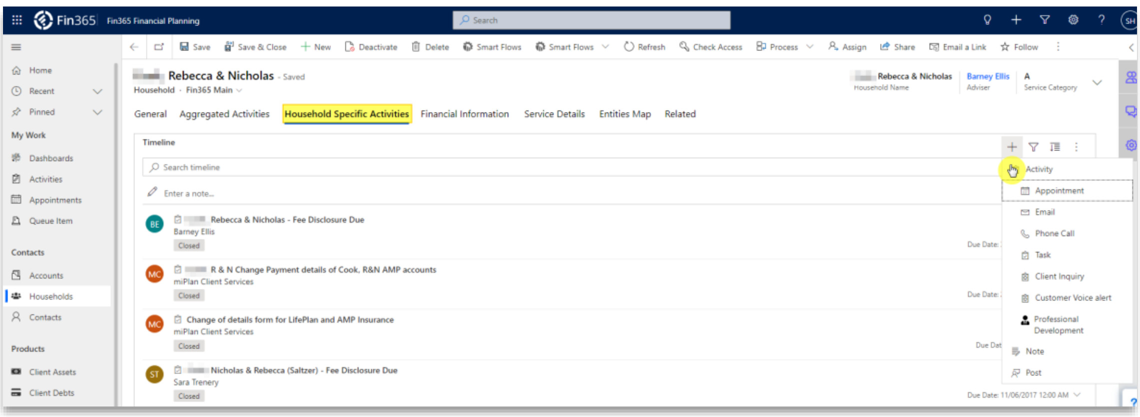
- Create a new Activity directly from this view
- Activities that are Regarding a related Service Period record are now included
- Notes connected directly to the Household or a related entity can now be viewed
- Notes connected directly to the Household or a related entity are included in the PDF export feature



Fin365 Aggregated Activities

Household Specific Activities Tab

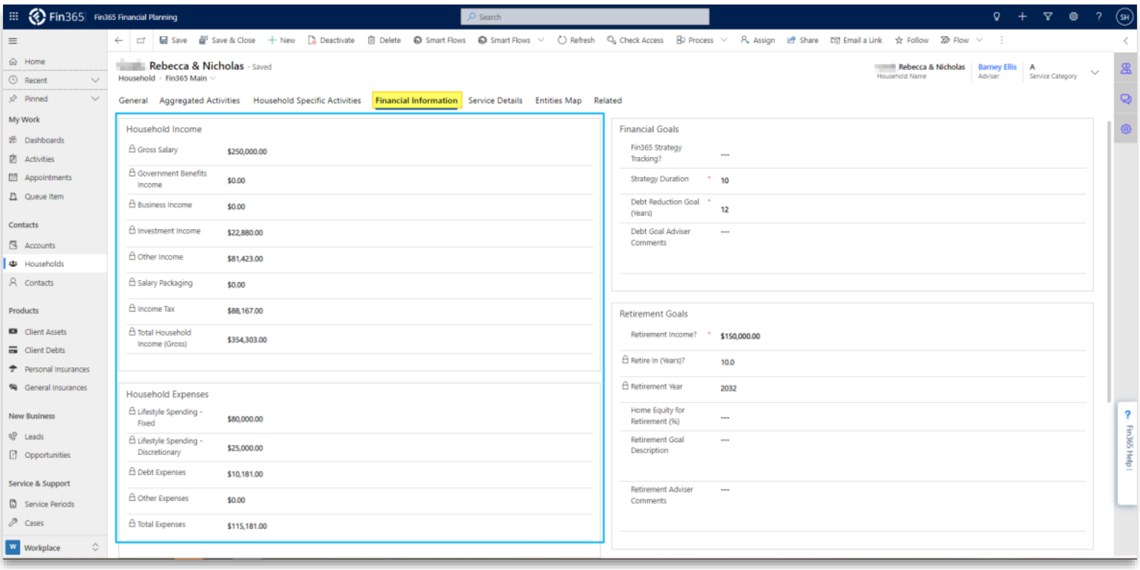
It has become more common for customers to want to attach activities (using the Regarding field) directly to the Household. While our Aggregated Activities feature facilitates this, the release of our **Notes Template** feature requires Microsoft's timeline editor. For these two reasons, we've decided to reinstate the Household Specific Activities tab on the Household form. While we acknowledge there's some redundancy between it and the Aggregated Activities tab, it provides the most efficient way to create/view activities that have been connected directly to the Household.



Household Specific Activities

Household Income & Expenses

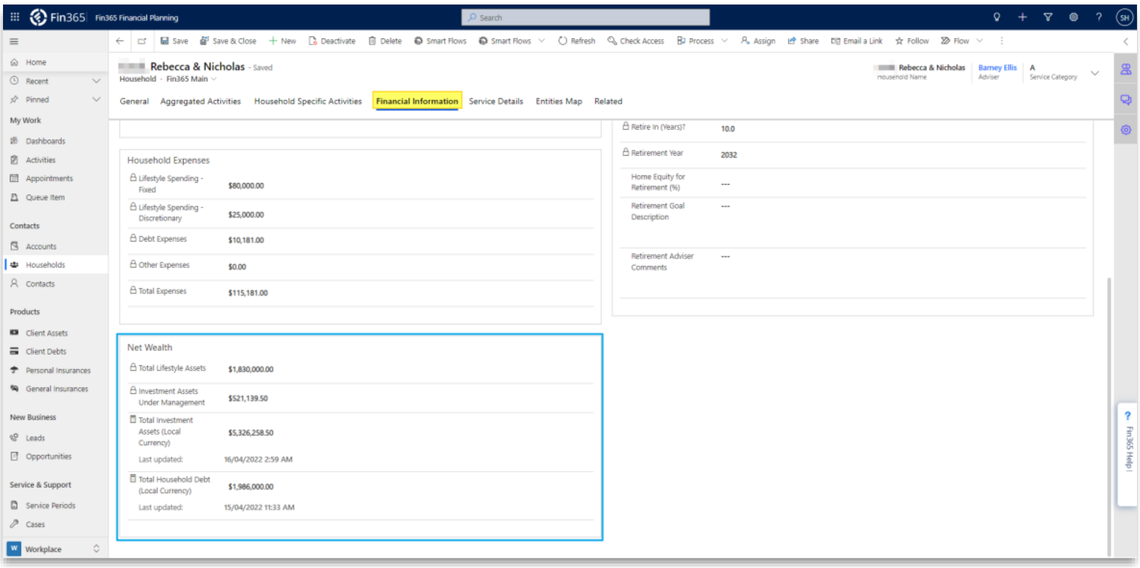
The aggregated Income and Expense fields on the Household record have been expanded to include new categories such as Business Income and Debt Expense. These fields aggregate/sum the amounts stored in related Household Expenses & Client Income records.



Household Income & Expenses

Household Income & Expenses

Total Lifestyle Assets and Investment Assets Under Management have been added to provide convenient reporting on related Client Asset records.



Household Net Wealth

Service Period Enhancements

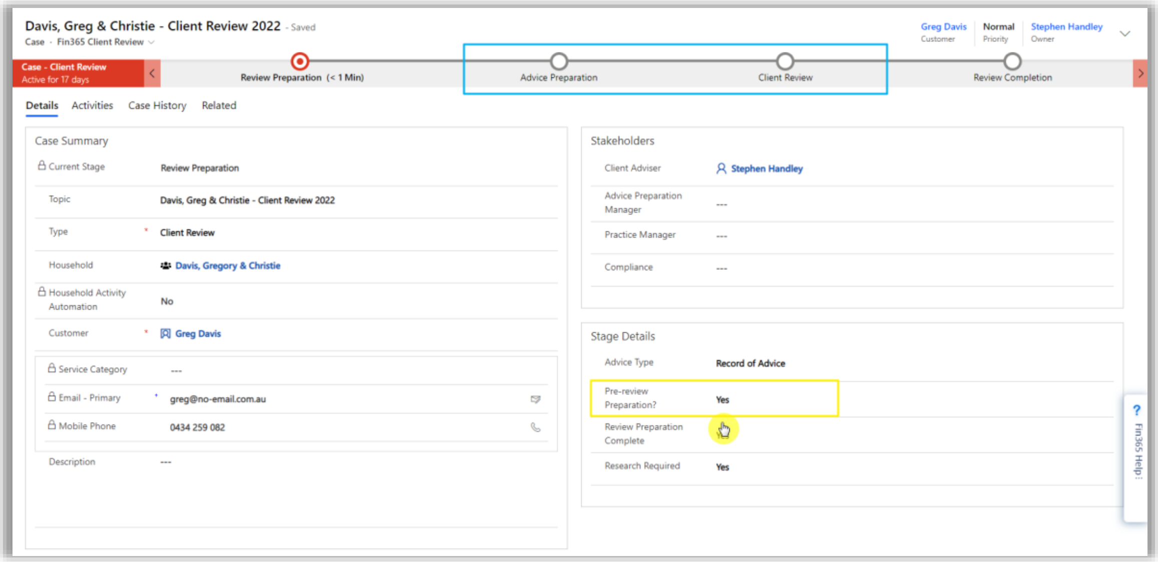
Aggregated Activities

In the same way we provide an aggregated view of activities on Cases and Opportunities, we've now added this feature to Service Periods.

Cases Enhancements

Client Review Process Stage Switching

Fin365's default Client Review process has been enhanced to allow Users to switch the order of the Advice Preparation and Client Review stages. A number of customers have indicated they generally prepare their advice documents prior to the initial client review appointment. To set the Advice Preparation stage prior to the Client Review stage, set the **Pre-review Preparation** field to Yes.



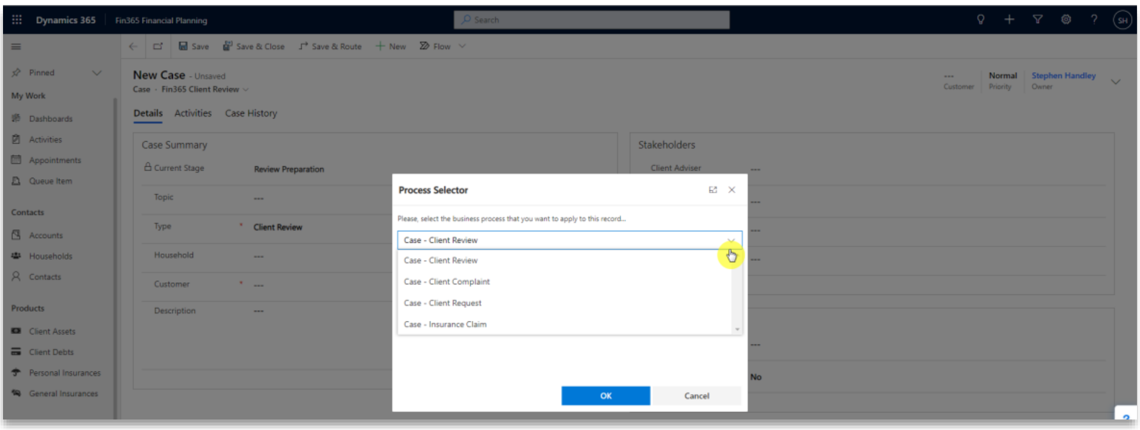
Client Review Stage Switching

New Case Process Flows

The following process flows have been added:

- Client Request
- Insurance Claim
- Client Complaint

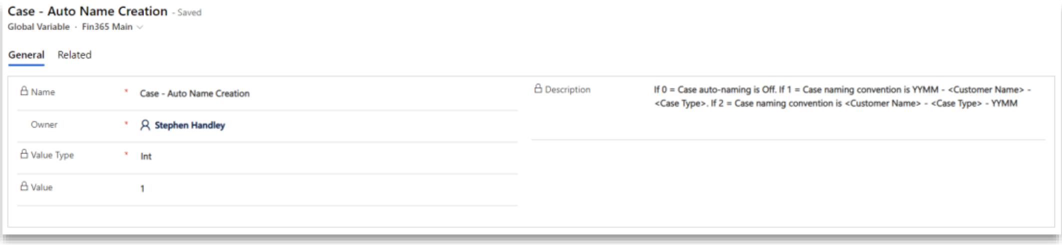
At this point in time, there are no automated activities generated during for any of these flows, however, customers can add their own automation via customisation or use Task Sequences to efficiently add activities.



Fin365 Case Process Flows

Case Auto Naming

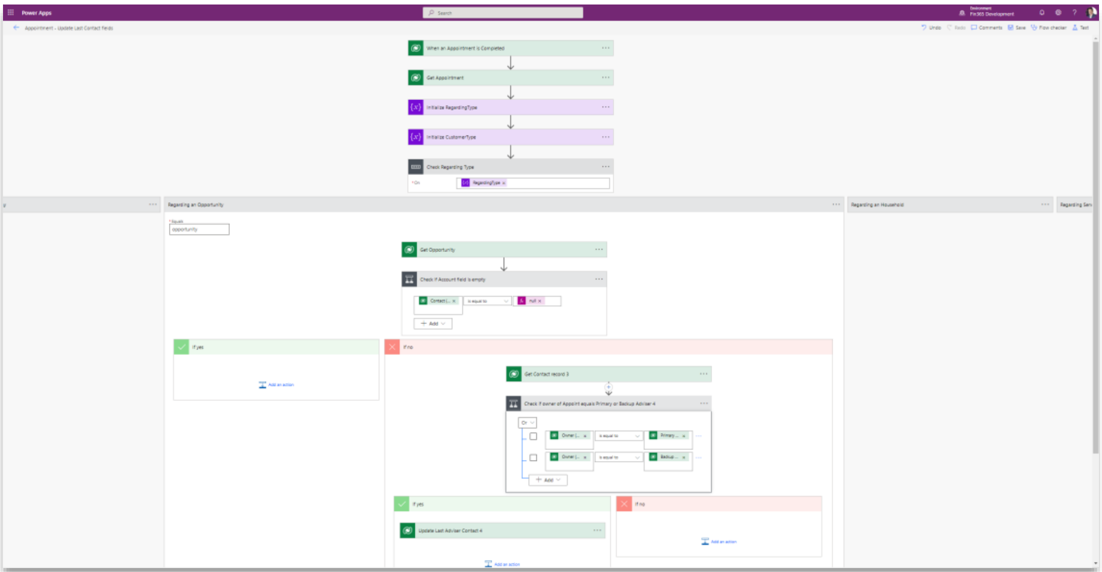
Fin365 now provides two different naming convention options for Fin365's automatic naming of Cases. The different formats can be chosen using the Case - Auto Name Creation global variable.



Case – Auto Name Creation global variable

Last Adviser Contact Flow

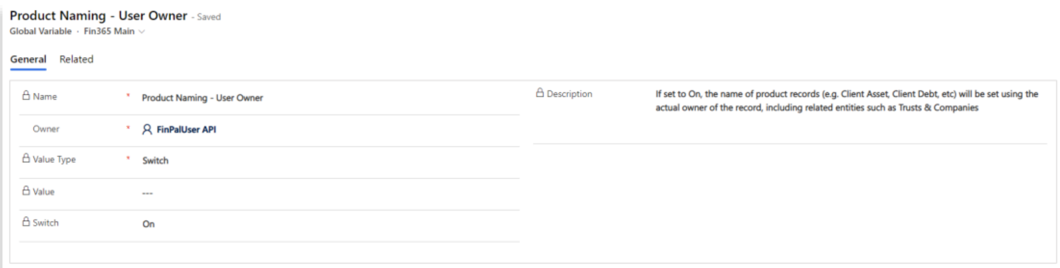
Fin365's existing automation of the Last Adviser Contact field is limited to our New Business and Client Review workflows and requires the remainder of our automation to be turned on. In this release we've added two new PowerAutomate Flows that will monitor the completion of all Appointments & Phone Calls and update this field any time an adviser connected to the clients makes contact. These automations do require a small amount of manual setup, so please contact Fin365 if you'd like to switch them on.



Last Adviser Contact Automation

Financial Product naming convention

Fin365 has enhanced the auto-naming of financial product record such as Client Assets & Client Debts. When the Product Naming – Use Owner global variable is set to On, the name of the product record will include the actual owner (e.g. Trust, Company, etc) rather than always using the Primary Client field.



Product Naming – Use Owner global variable

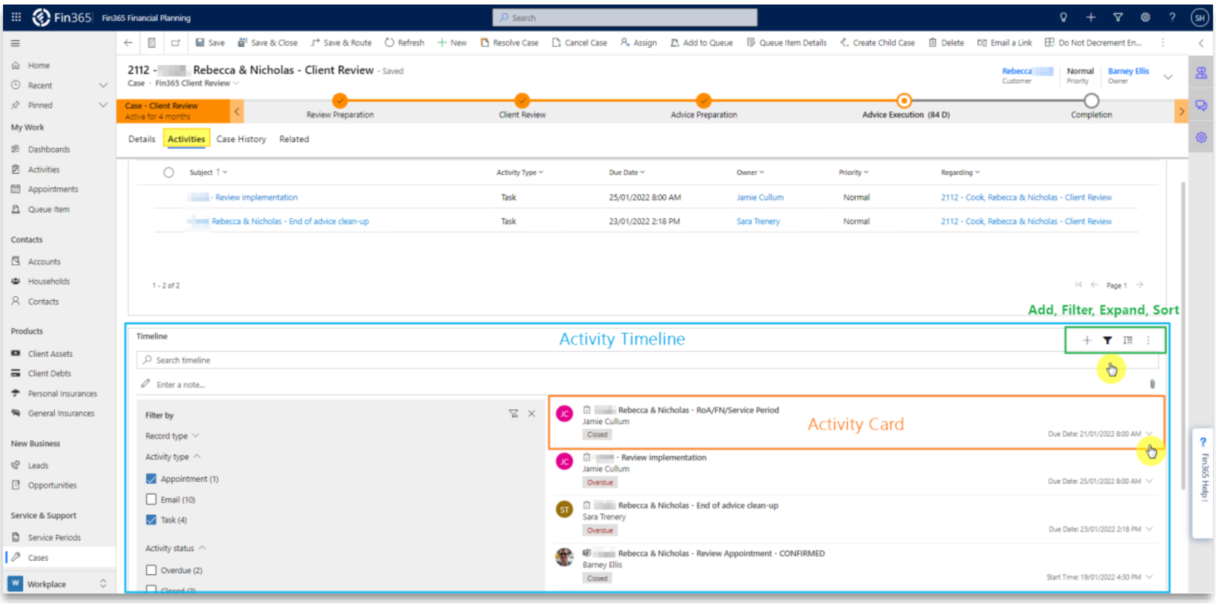
Activity Timeline Enhancements

Historically sort order on Activity timelines was by Last Modified Date. However, this created significant issues, especially for historical data imported from other systems because the Modified Date field is a system field that cannot be manually adjusted.

After significant feedback from our customer base we've made the decision to change default sort order on Activity/Notes timelines to Created Date.

For any customers who prefer the Modified Date sorting, it can still be achieved via a custom form.

We've also changed each of the main activity (Tasks, Appointments, Emails, Phone Calls) cards to be more consistent with what is displayed.

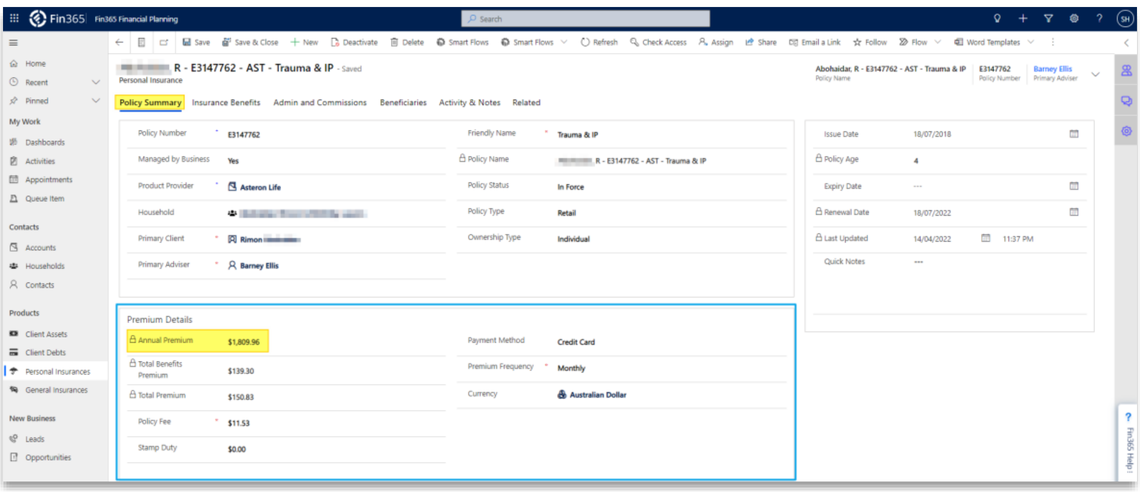


Microsoft Dynamics Activity Timeline

Personal Insurance Enhancements

Annual Premium Field

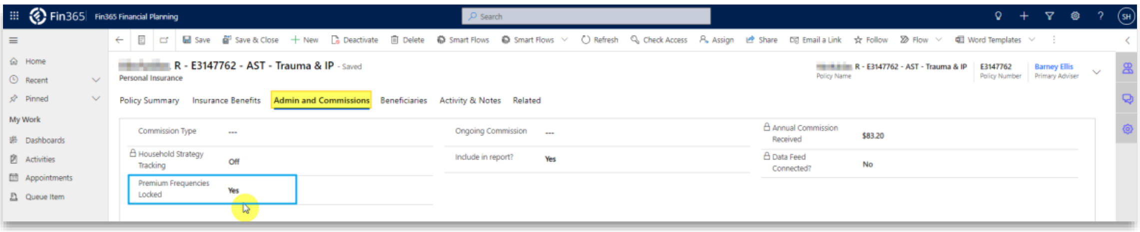
The new Annual Premium field automatically calculates the annual premium paid on a personal insurance policy, regardless of the actual frequency of the premium payments.



Personal Insurance Annual Premium field

Lock (Benefit) Premium Frequencies

Because it is theoretically possible, the **Premium Frequency** field of Insurance Benefits is independent of the **Premium Frequency** field on the parent **Personal Insurance** policy record. However, in practice this is rarely the case, so a new **Premium Frequencies Locked** field has been added and will be set to Yes by default. When set to Yes, the Premium Frequency field of all Insurance Benefit records will be locked and set to match the Premium Frequency of the parent policy.

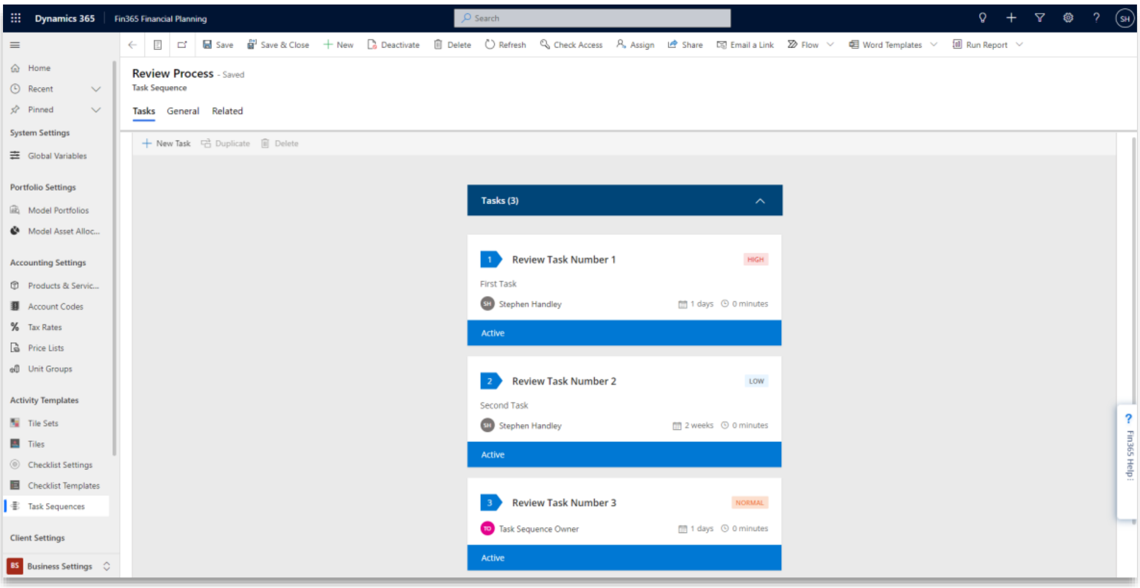


(Insurance Benefit) Premium Frequencies Locked field

Workflow Automation Enhancements

Trigger a Task Sequence from a workflow

It is now possible to kick off a Task Sequence from a Dynamics CRM workflow. E.g. kick off the "Portfolio Switch" task sequence each time you enter the Implementation stage of a Client Review.



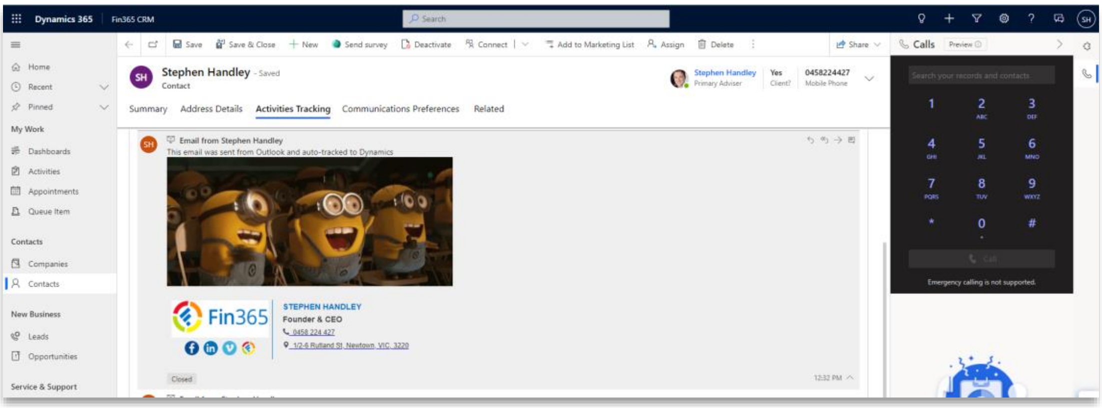
Fin365 Task Sequences

User Birthday/Age

This one was added specifically for our CEO, who has a tendency to overlook even his own birthday. It's now possible to set the date of birth on User records. We've also added automation to update corresponding Next Birthday and Age fields. Rumour has it's Stephen is secretly working on PowerAutomate flows that will send a happy birthday Teams post to staff members from him.

Auto Track Outbound Emails

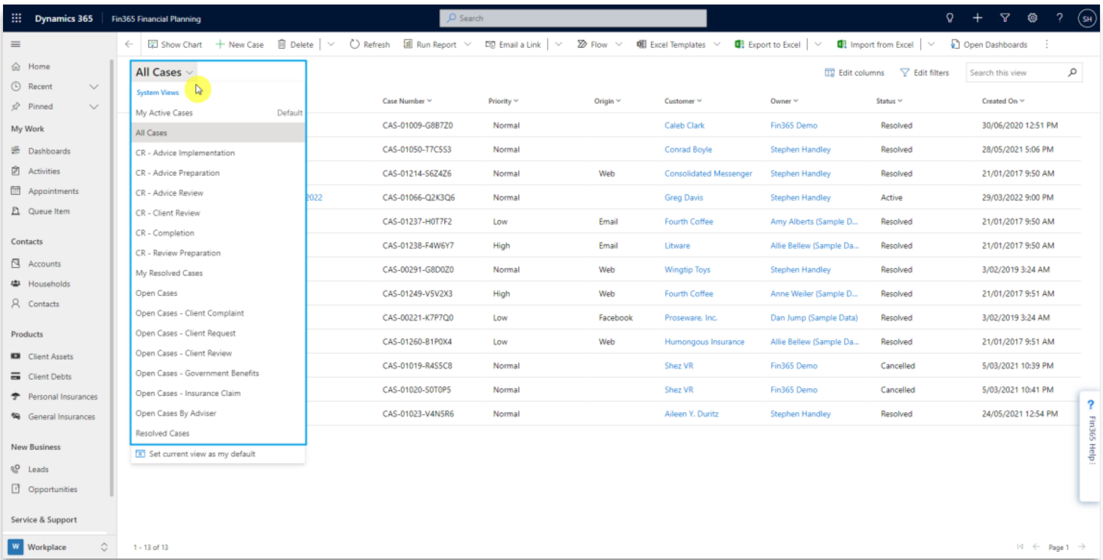
This one comes courtesy of Microsoft. It is now possible to automatically track outbound emails sent through Outlook. It is important to note that this is a business wide setting that will affect all users. Please contact us if you would like this feature switched on.



Auto-track Outlook outbound emails

Updated Views

System & personal **Views** provide a convenient way to quickly filter/segment CRM records.



CRM Entity Views

The following Fin365 system views have been improved based on customer feedback:

View(s)	Improvement
Open Client Debts	Debt Category field added
Opportunity Financial Planning stage views	New stage specific views have been added for Financial Planning Opportunities
Case Client Review stage views	New stage specific views have been added for Client Review Cases
Case Type views	New views have been added for different Case types (e.g. Insurance Claim, Client Complaint, etc)
Open Cases	Case Type field has been added
Active Customers & My Active Customers	Multiple field changes
All Contacts & All Active Contacts	Multiple field changes