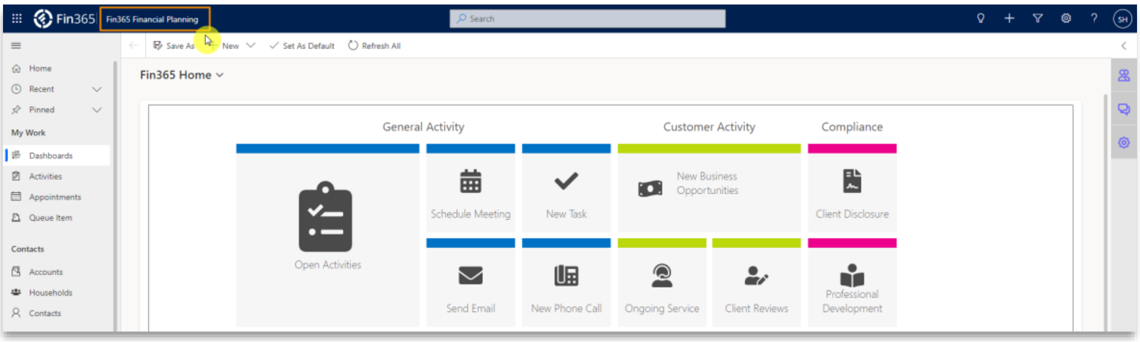
CRM & Portal Release Notes

July 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.

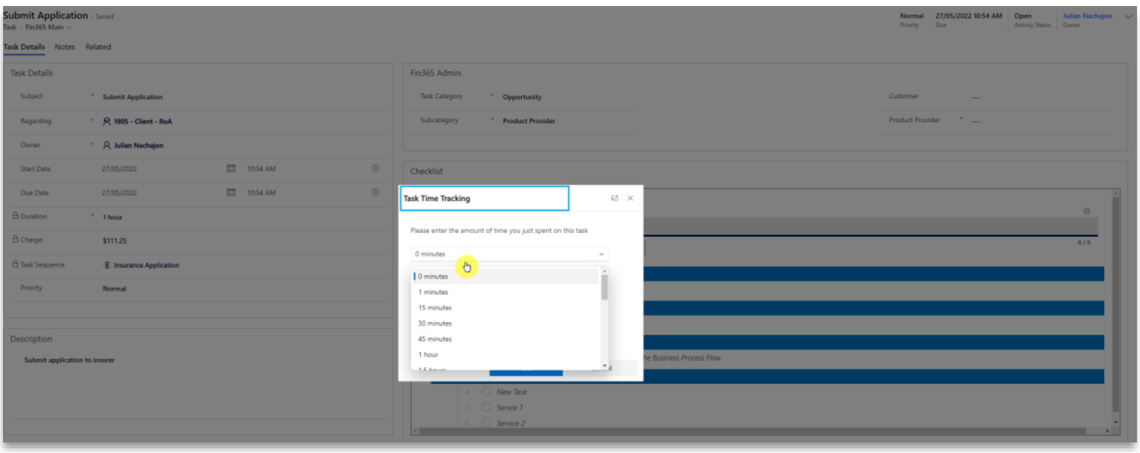


New Features

Task Time Entries

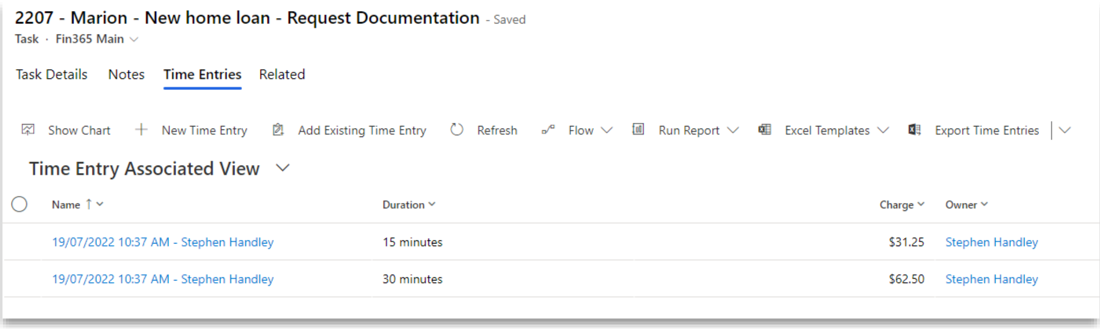
Historically it has only been possible to set the Duration field on Tasks, limiting the granularity of reporting on metrics such as staff time and profitability per client.

In this release we've added the ability to capture multiple Time Entry records on an individual Tasks. If this feature is switched on, each time a staff member (CRM User) saves a Task, a dialog box requesting the user to enter time spent will appear.



Fin365 Task Time Tracking

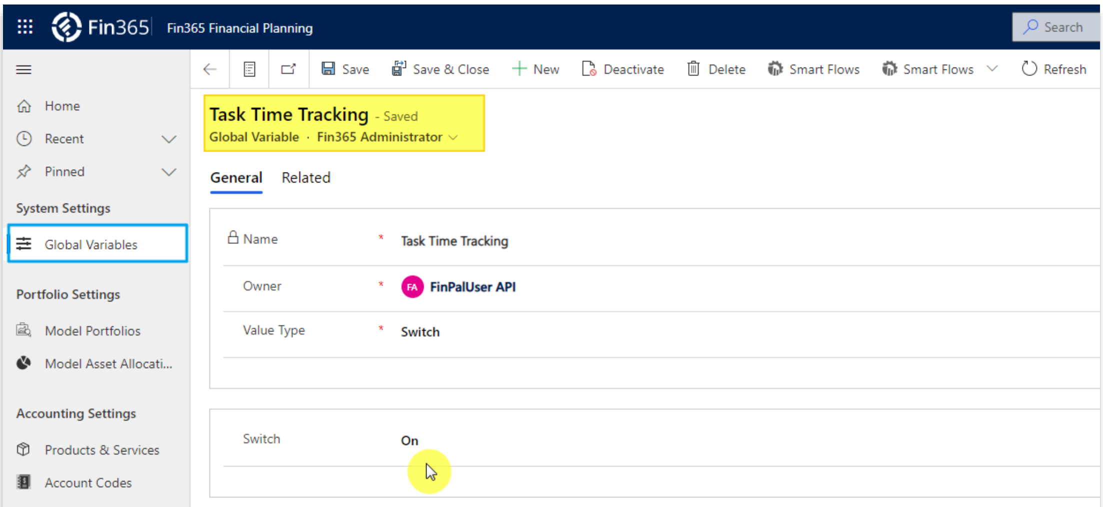
Each Time Entry will record a user, duration and cost. The Task Duration and (new) Cost fields will be calculated by summing all related Time Entry records.



Fin365 Task Time Entry

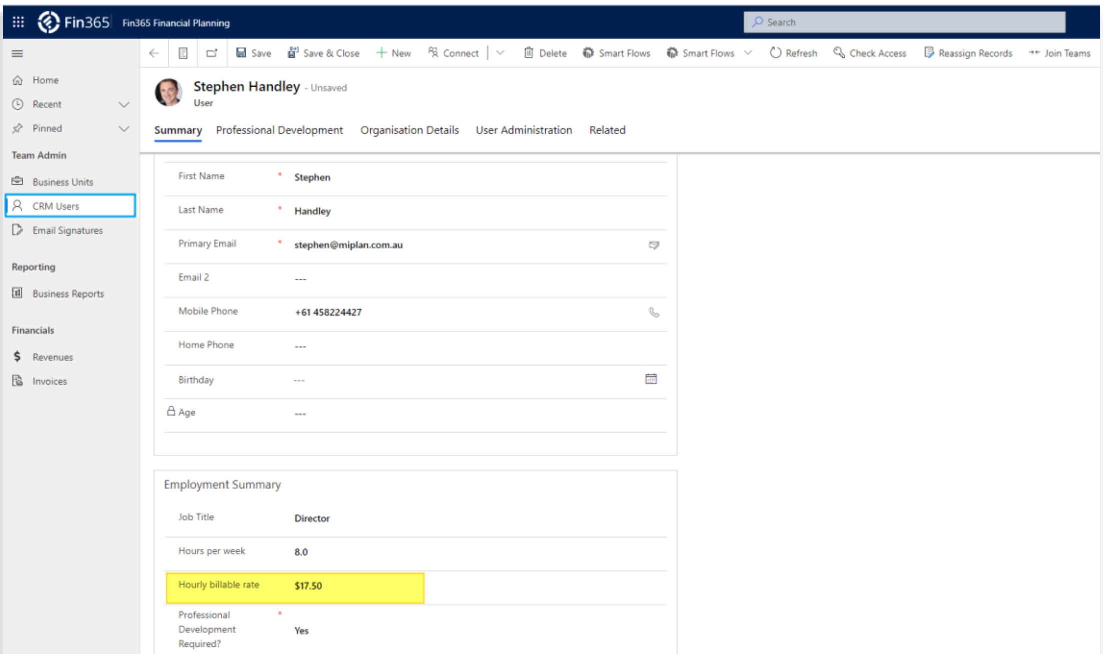
Use Time Tracking Global Variable

To switch on the Time Tracking feature, set t



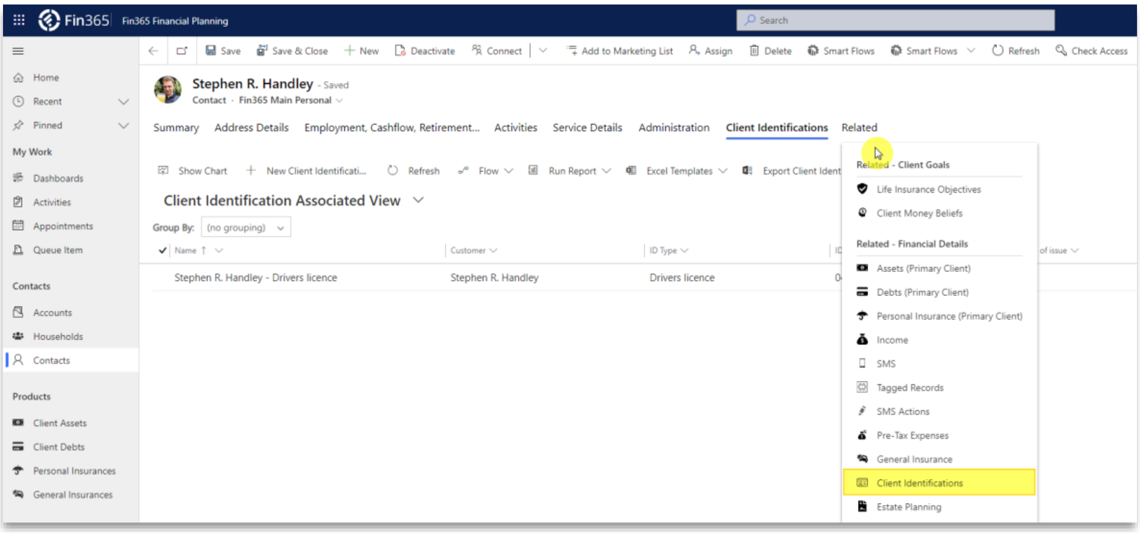
User Charge Out Rate

Cost of each Time Entry is calculated by multiplying the duration by the associated CRM User's **Hourly billable rate**, which can be set on the User record under Business Admin section of the CRM



Client Identification entity

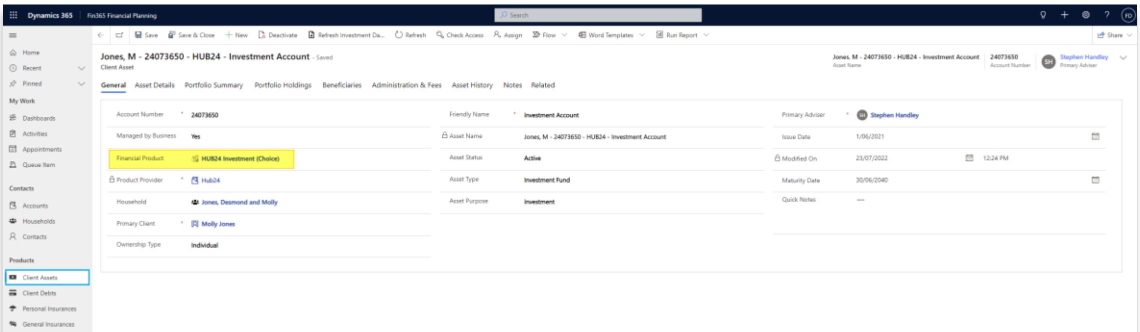
A new Client Identification entity has been added to allow the capture more details about Client ID documents such as Drivers licence, Passport, Birth certificate, etc.



Fin365 Client Identification

Financial Product entity

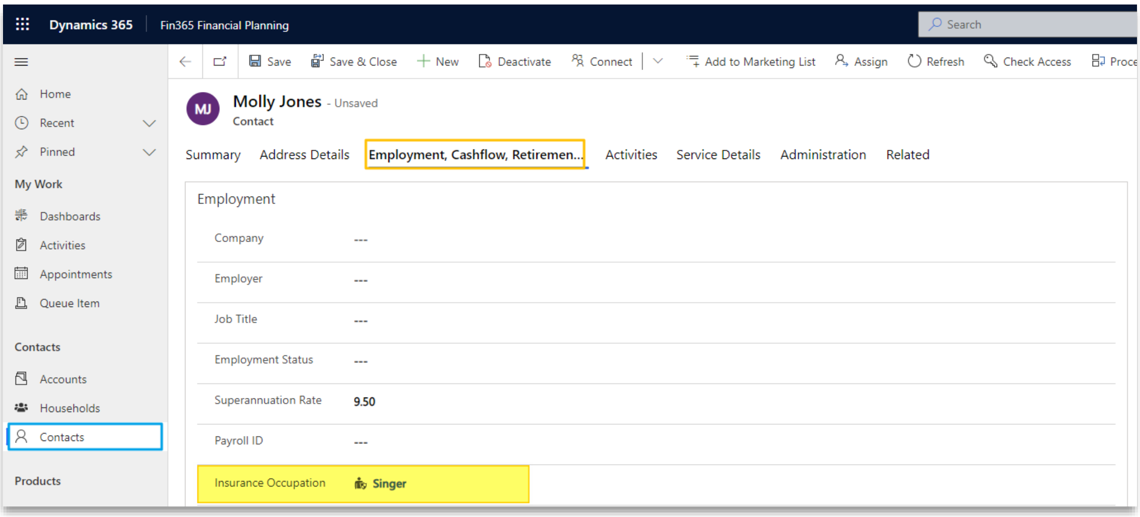
To enhance existing, and future, integrations with financial planning systems such as [PrimeSolve](), [ProductRex](), etc. we have added a new **Financial Product** entity. Like our **Product Provider** list, we will automatically create a list of know Financial Products that can be linked to Client Asset and Personal Insurance records. When linked to a Financial Product, the corresponding **Product Provider** will automatically be added to the Client Asset record. Initially this list will only include Australian based financial products. Over time, we'll expand this list to include other geographies.



Fin365 Financial Product

Insurance Occupation entity

Another enhancement for integrations with financial planning systems is our new **Insurance Occupation** entity. As per the Financial Product entity, we will automatically create a list of know Insurance Occupations that can be linked to Contacts.



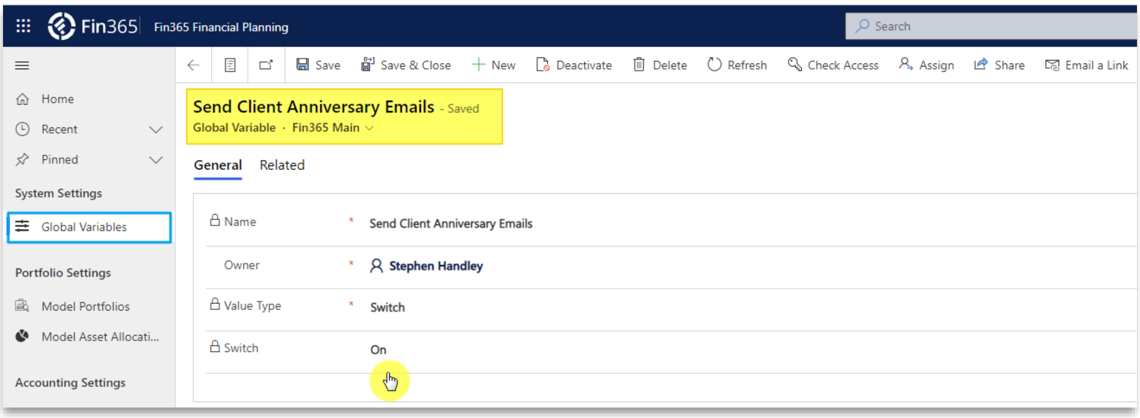
Fin365 insurance Occupation

Wedding Date & Anniversary Email

A new **Wedding Date** field has been added to the Contact record. When this field is populated the **Next Anniversary Date** field will be automatically calculated.

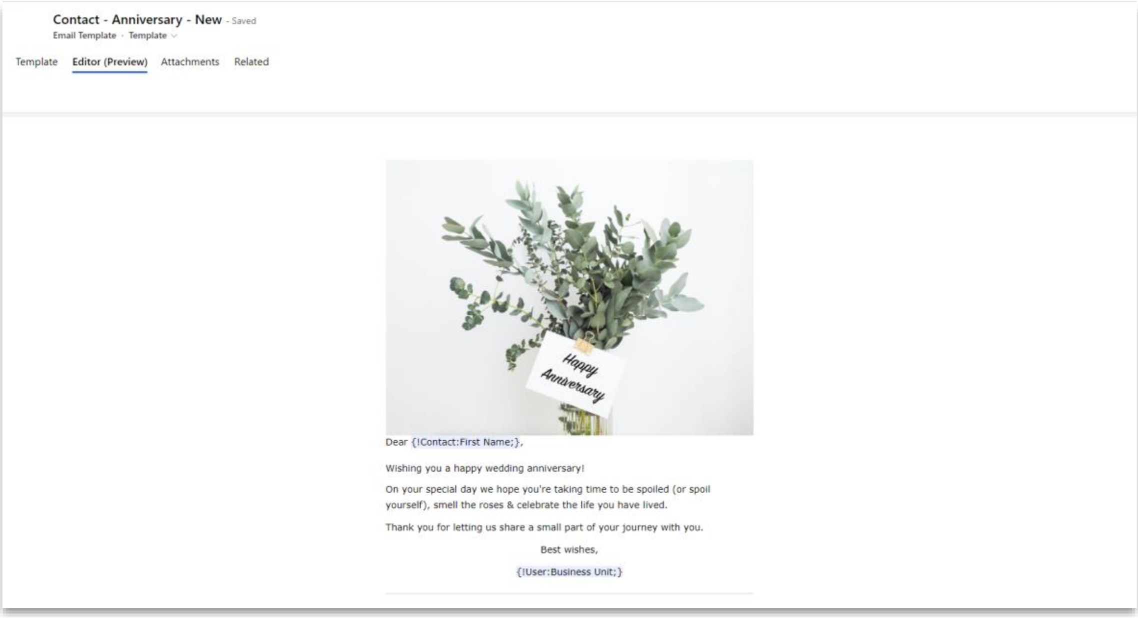
Send Client Anniversary Emails Global Variable

To switch on the automated anniversary emails, set the **Send Client Anniversary Emails** Global Variable to On



Wedding Anniversary email template

The **Contact – Anniversary – New** email template will be used by the automation process. At this point in time emails are sent to every Contact record that has a wedding anniversary today. I.e. if both the husband and wife have that field populated, they will both receive an email.

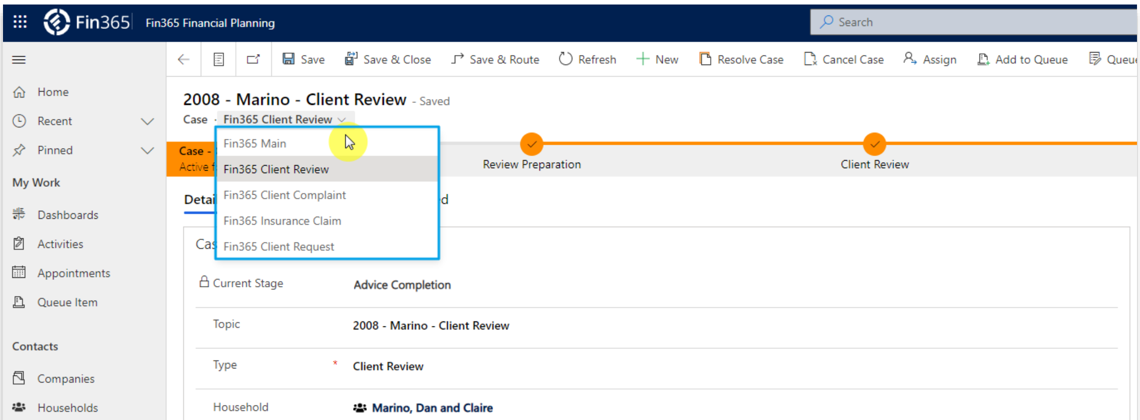


Fin365 Wedding Anniversary Template

Enhanced Features

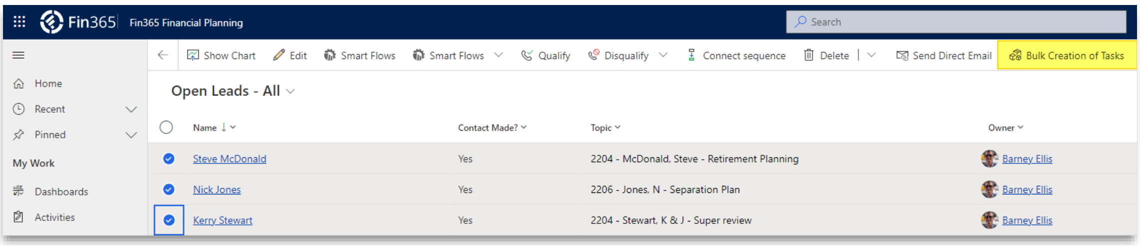
Case Forms

The following Case Forms have been added to improve usability for different workflow types. Please keep in mind that Case Forms do not automatically switch according to the workflow being used. Staff members should be shown how to manually change forms.



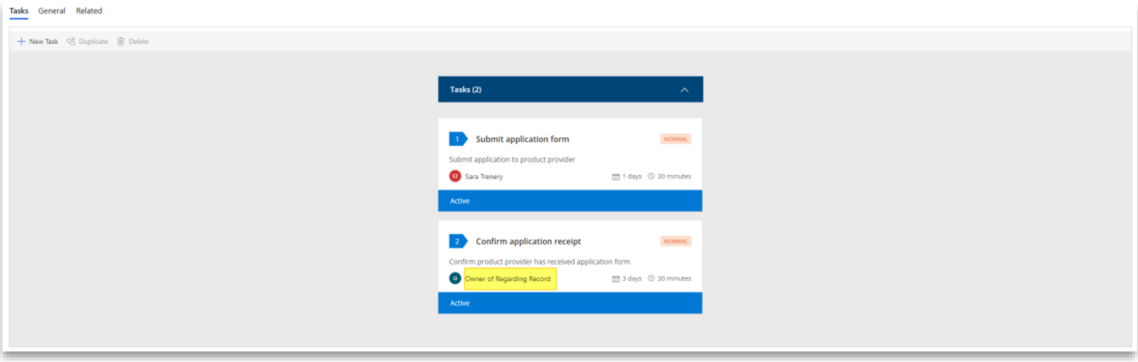
Bulk Tasks

Bulk Task creation is now possible on Leads, Contacts, Households, Opportunities, Cases & Service Periods



Task Sequences

A new Owner Type option (**Owner of Regarding Record**) has been added. When this option is used, the Task will be assigned to the Owner of the record referenced in the Task regarding field.



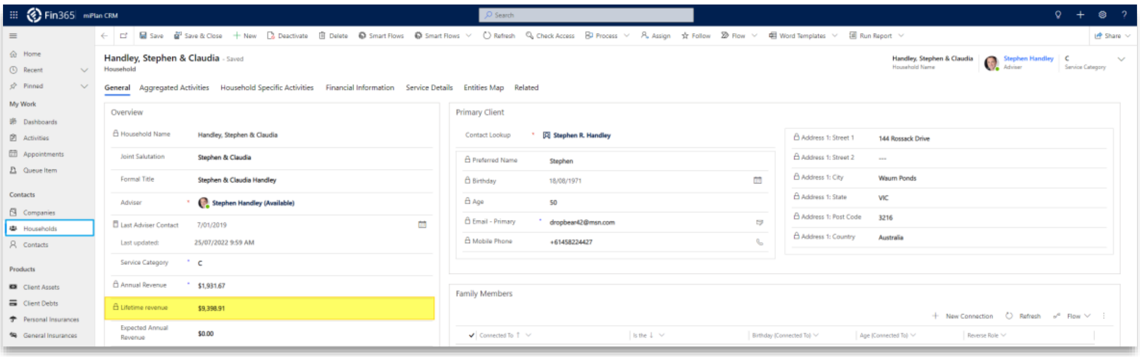
Re-opening of Tasks in a sequence

A re-opened Task that is connected to a Sequence will no longer trigger the creation of the next Task in the sequence, avoiding duplicate Tasks.

Household Entity Improvements

Lifetime Revenue

A Lifetime Revenue field has been added to the Household entity to report the total revenue received across all members of the Household. This value is inclusive of any tax.



New KYC fields

The following fields have been added to improve the level of "Know Your Client" (KYC) detail that can be stored in the CRM

Entity	Field	Details
Contact	W-8BEN form expiry	Tracks the expiry date of the W-8BEN form
Contact	Director Identification Number	Tracks the Director ID number for Clients who are directors of companies
Contact	Accountant certificate expiry	Tracks the expiry date of sophisticated investor Accountant certificates
Company	W-8BEN form expiry	Tracks the expiry date of the W-8BEN form
Company	Accountant certificate expiry	Tracks the expiry date of sophisticated investor Accountant certificates

Forms

Entity	Form	Details
Company/Account	Fin365 Non-Customer	Renaming of our original Company form to better differentiate between it and the Customer specific form
Company/Account	Fin365 Customer	Add the new KYC fields (above)
Contact	Fin365 Personal	Add the new KYC fields (above)

Views

The following changes have been made to System Views

Entity	View	Changes
Household	Active Households	Added Expected Annual Revenue
Household	Households - Fee Disclosure Due	Added related columns
Household	My Active Households	Will now display Households when current User = Primary Adviser, Backup Adviser, Practice Manager or Compliance Manager
Cases	Open Cases – Client Complaint Open Cases – Client Request Open Cases – Client Review Open Cases – Government Benefits Open Cases – Insurance Claim	New views for easily filtering of different Case types

Lending New Business Workflow

Based on feedback from some customers who provide mortgage broking services, we've added some enhancements to our default new business lending workflow.

Lending Workflow Stages

Lead → Introduction → Lodgement → Assessment → Settlement

Lending Workflow Status Fields

Stage	Field	Type	Purpose
Introduction	Credit guide sent	Date	Date on which the credit guide was sent
	Fact find date	Date	Date client fact find was completed
	Compliance documents signed?	Date	Date on which the compliance documents were signed
	Intro Appointment Complete?	Yes/No	Has the initial meeting with the client been completed?
	Client objectives documented?	Yes/No	Have the client's objectives been documented
	Authority to prepare application?	Yes/No	Has the client given the authority to prepare the loan application?
Lodgement	Research complete?	Yes/No	Has loan research been completed?
	Loan proposal presented	Date	Date loan proposal was presented to the client
	Loan proposal signed?	Yes/No	Loan proposal signed by the client?
	Loan application prepared?	Date	Date upon which the loan application was prepared and ready for signing
	Loan application signed?	Yes/No	Loan application signed by the clients?
	Pre-lodgement quality check?	Yes/No	Has internal quality assurance check of loan application been complete?
	Application lodgement date	Date	Date loan application lodged with the lender
Assessment	Loan application status	Choice	Status of the loan application?
	Insurance referral requested?	Yes/No	Has the client requested to speak to someone out personal insurance?
	Unconditional approval	Date	
	Loan contracts submitted?	Yes/No	Have the loan contracts been submitted?
Settlement	Settlement date	Date	Date of loan settlement
	Loan settled?	Yes/No	Has the loan successfully settled?
	File clean-up complete?	Yes/No	End of process quality assurance steps complete?

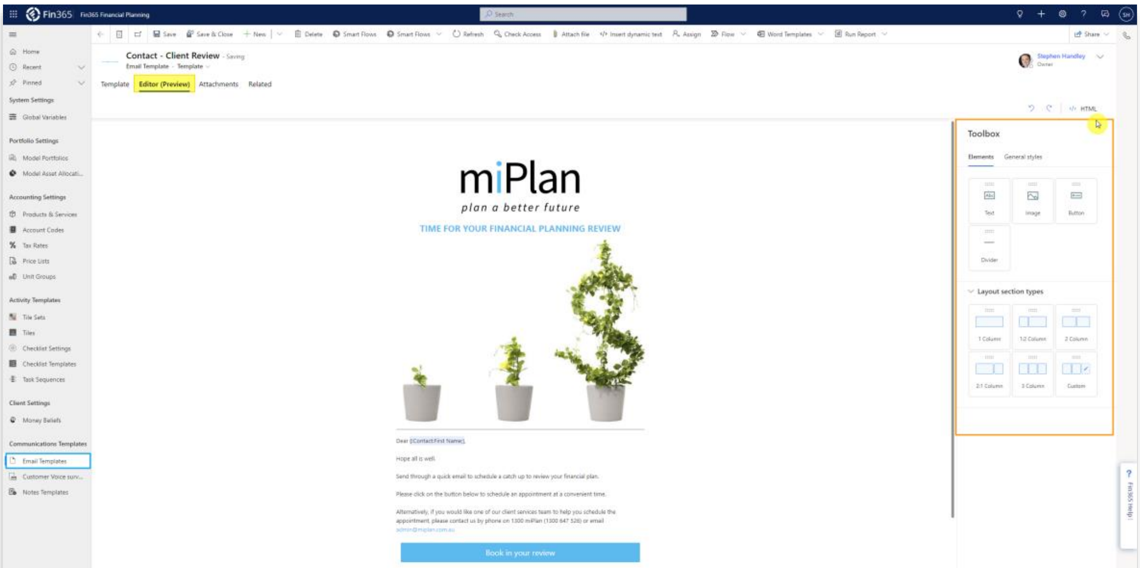
Microsoft Enhancements

Microsoft generally roles out two major releases each year. Detailed release notes are [published on their website](#).

For convenience, we've listed some of our favourite recent enhancements below

HTML Email Templates

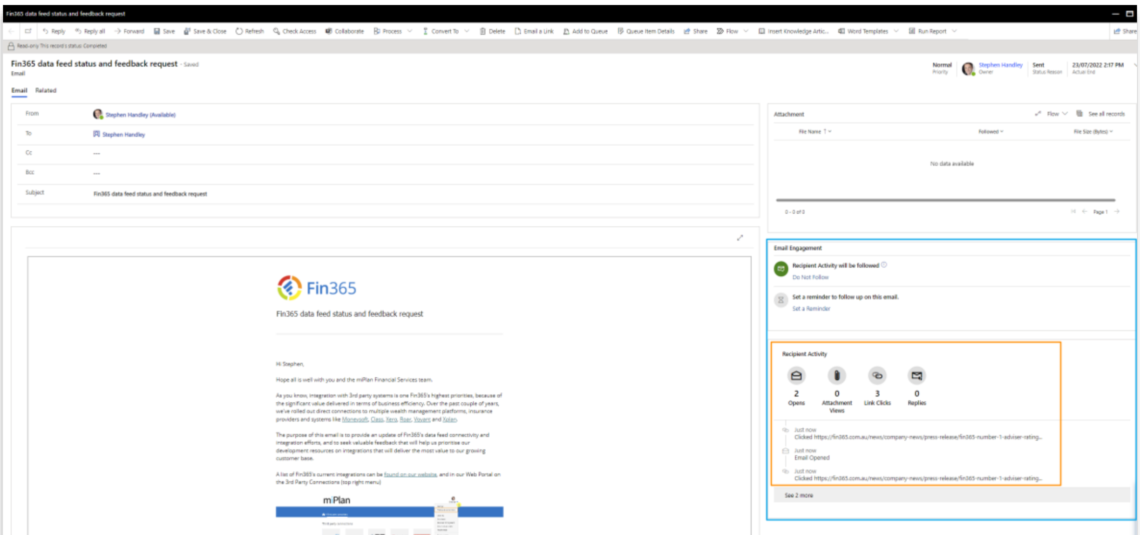
Historically, email editing in Microsoft Dynamics CRM has been significantly limited. With these latest updates, it's now possible to construct attractive email templates directly in the CRM, which (for many) will remove the need for 3rd party systems like Mailchimp. This feature does need to be enabled in each environment. There's a good set of instructions at [this site](#), or reach out if you'd like our help switching it on.



Dynamics CRM email templates

Email engagement

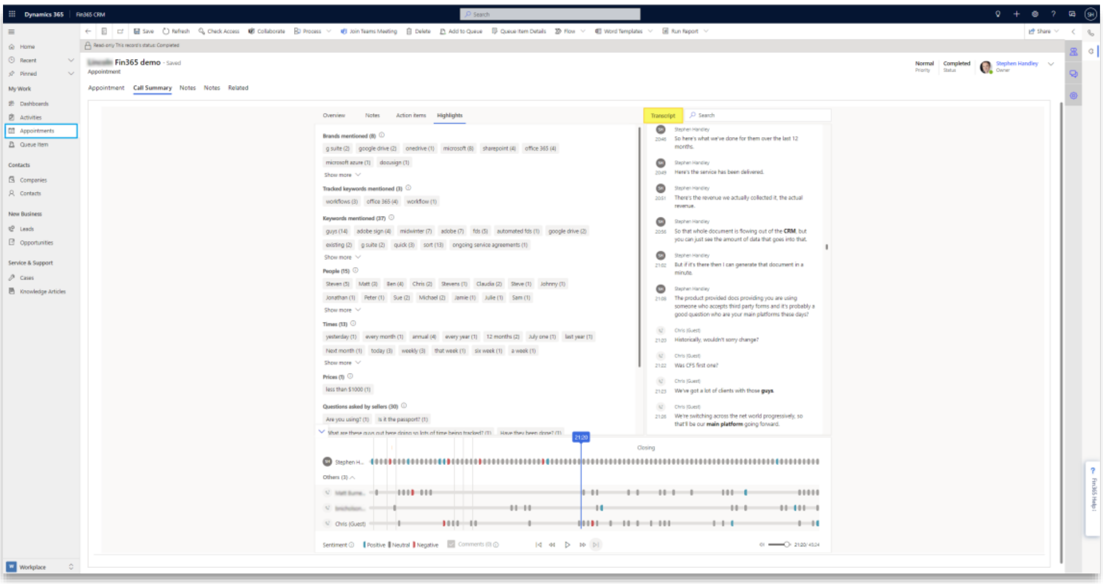
A helpful feature for both engagement and compliance, Microsoft's new Email Engagement enhancements allow you to view recipient message interactions such as, alerts, clicked a link, opened an attachment, or sent a reply on your emails. Details about this feature, including how to switch it on, [can be found here](#)



Dynamics CRM email engagement

Microsoft Teams meetings capture

Another amazing new feature from Microsoft is the ability to automatically record/transcribe Teams meetings that have been tracked to a CRM record. This feature is currently in preview but we've already been testing it within Fin365/miPlan and it's working very well. More details about the Dynamics CRM/Teams meetings integration can be [found here]



Dynamics CRM Teams Meeting capture

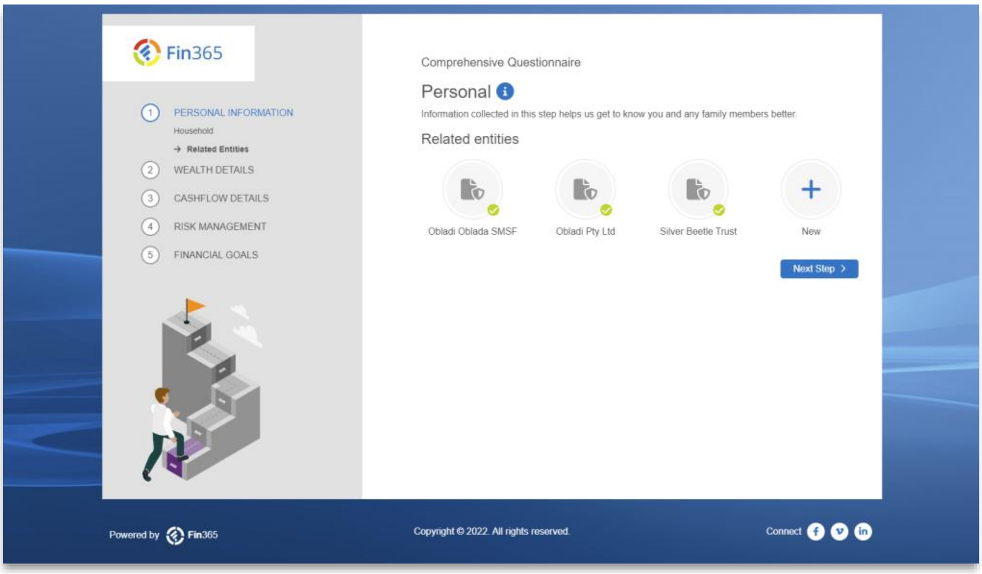
Fin365 Portal Update (Coming Soon)

Along with our latest CRM release, we're also VERY close to releasing the following updates to our Web Portal. We're currently in testing and expect to release sometime in August.

Client Onboarding Enhancements

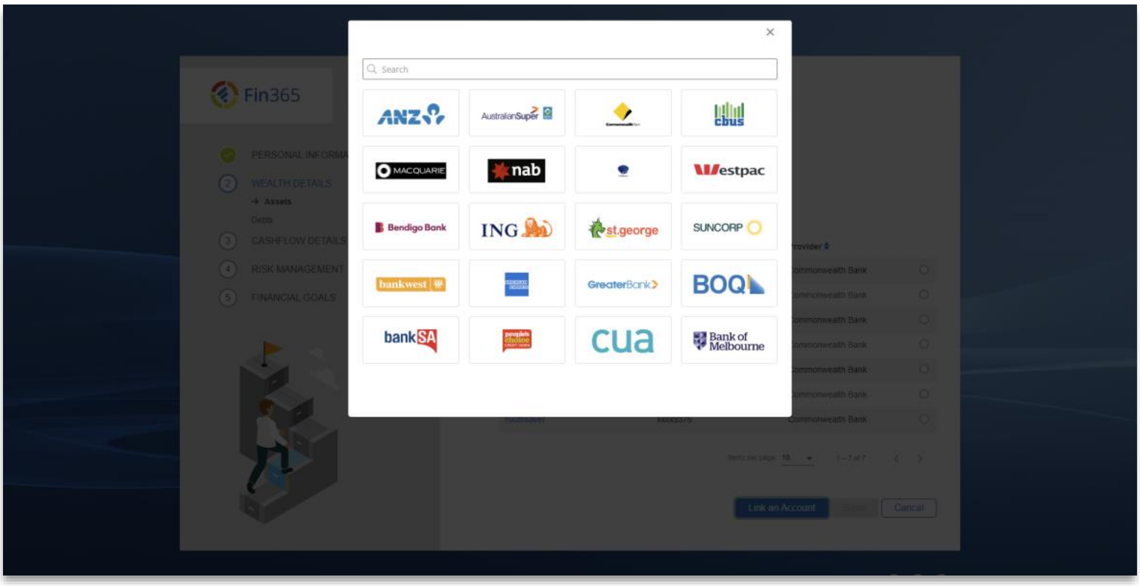
Our web based client onboarding (fact find) will receive the following enhancements:

- The ability for clients to provide information about related entities such as Companies and Trusts
- The ability to copy secure portal invitation links for delivery
- Clients will not be required to enter a password to complete the online fact find
- The ability to add/connect accounts from other financial institutions (via our Yodlee integration)



Evestnet Yodlee Integration

Envestnet | Yodlee is one of the world's leading financial services data and open banking provider. Fin365's integration with Yodlee will deliver automated data feeds from hundreds of global financial institutions, including banks, stock trading and industry superannuation funds.



Fin365 Yodlee Integration

Annual Engagement Document Templates

Our document templating application now provides the ability to generate annual engagements documents that pull data from Service Periods and related records.

Fin365

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23 July 2022

Michael Smith & Julie Jones
3 Beachside Court, Castaways Beach, QLD, 4567

Ongoing Service Agreement

Dear Michael & Julie,

miPlan Financial Services Pty Ltd provides services on an annual basis. Every year we are required by law to obtain your written consent before any ongoing service fees can be deducted from your account.

We agree to engage miPlan Financial Services Pty Ltd for the period **17/11/2019 to 16/11/2020**. At the end of the period, you will receive a renewal notice within 60 days asking you to re-engage our services.

How long does the consent last?

Your consent expires on the **14/04/2021**. If we have not heard from you by this date your ongoing service fees will be terminated, and you will not receive any further support.

How can you withdraw your consent?

You may withdraw your consent at any time by notifying us in writing. We will reply to your request within 10 business days.