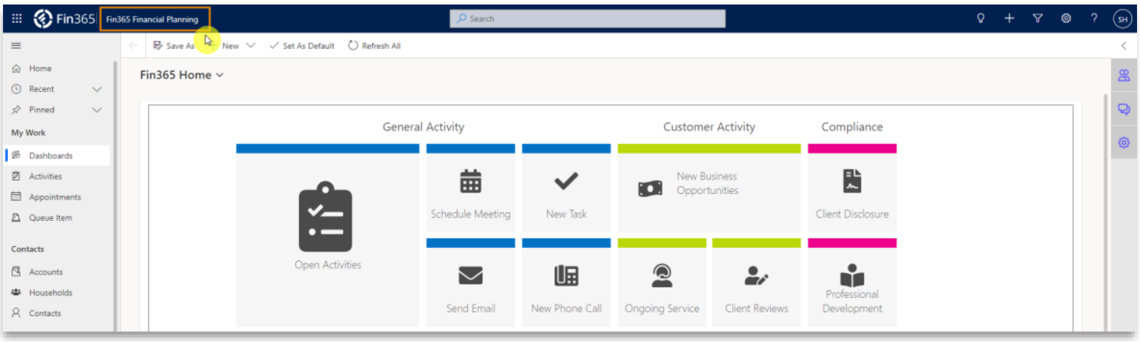
Fin365

CRM & Portal Release Notes

December 2022

Welcome to Fin365 CRM v6.5. This release is a major release packed with new features and improvements to existing features.

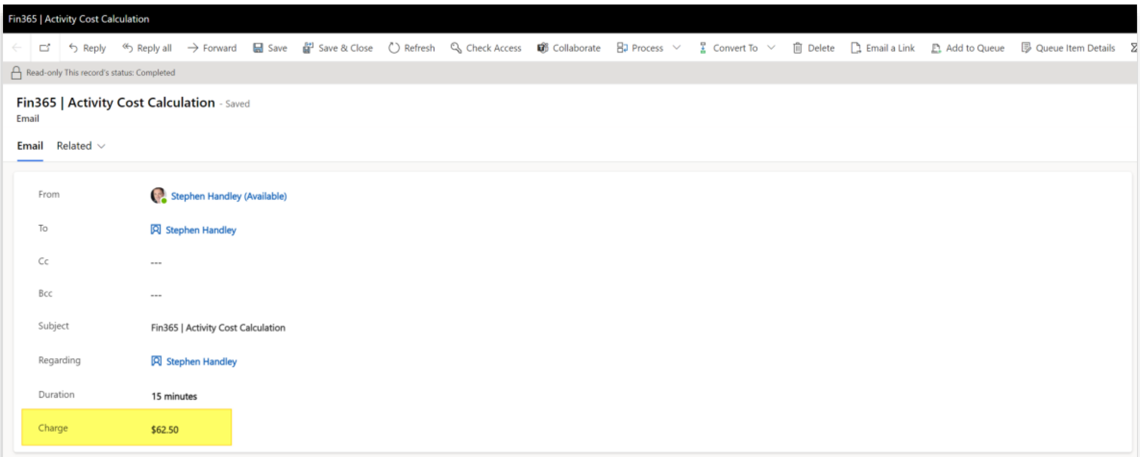
Just a reminder that all new features can be found in the Fin365 standard applications. Any customers with customised applications may not see them without further customisation work.



New Features

Activity Costing

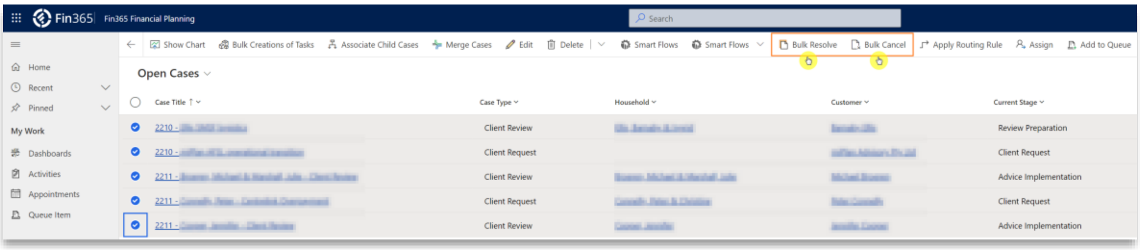
An extension to the Time Entries feature that was added in the last release, we've now added a Charge field to Appointments, Phone Calls and Emails. This field is automatically calculated by multiplying the activity Duration by the value stored in the owning User's Charge Out Rate field. In the same way we automatically calculate Total Time spent on Households, Companies, Contacts, Opportunities, Cases and Service periods, we will now also automatically calculate total Charge (Cost) of servicing these clients over the same period.



Activity Charge field

Bulk Resolution/Cancellation of Cases

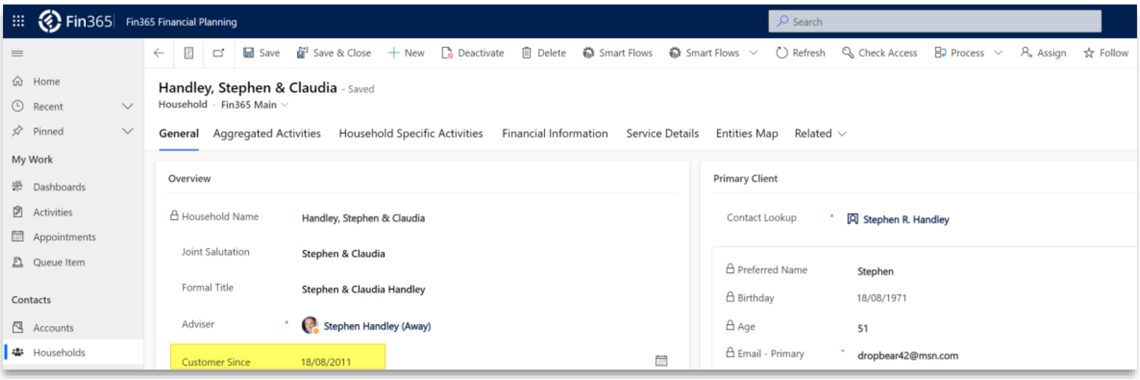
To enhance the efficiency with which Cases can be managed, we've added the ability to Resolve or Cancel multiple Cases at the same time. Because Microsoft automatically cancels any remaining Activities under Cases upon closure, which can result in performance issues, there's a limit to the number of Cases that can be closed in bulk.



Bulk Resolve/Cancel Cases

Customer Since Fields

To enhance client segmentation options, especially in the area of revenue KPIs, we've added a Customer Since field on the Household, Contact and Company entity. Contact fields will automatically populate with the same date as captured on the connected Household record.



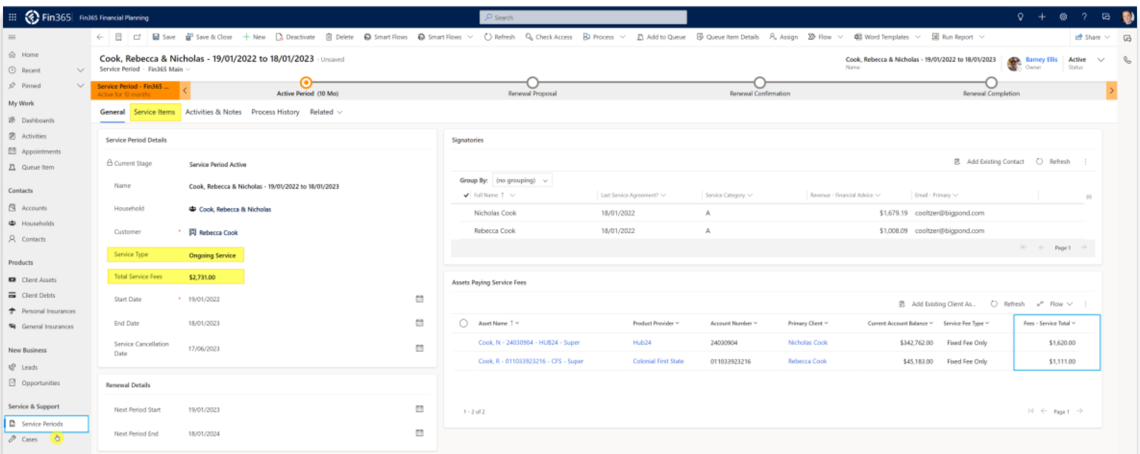
Customer Since fields

Enhanced Features

Service Periods

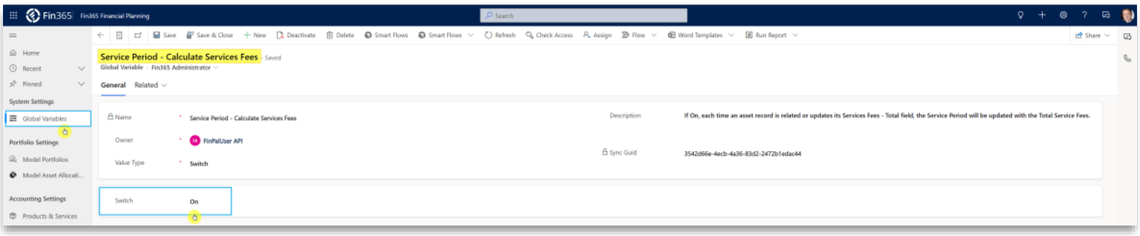
Service Periods are one of our most used features. In this release we've added the following enhancements:

- It is now possible to mark a Service Period as Ongoing Service or Fixed Term
- Upon completion of a Service Period, Service Items will be automatically copied to the next Service Period
- A new Total Service Fees field has been added that can be set to auto-calculate based on the attached Assets.



Fin365 Service Periods

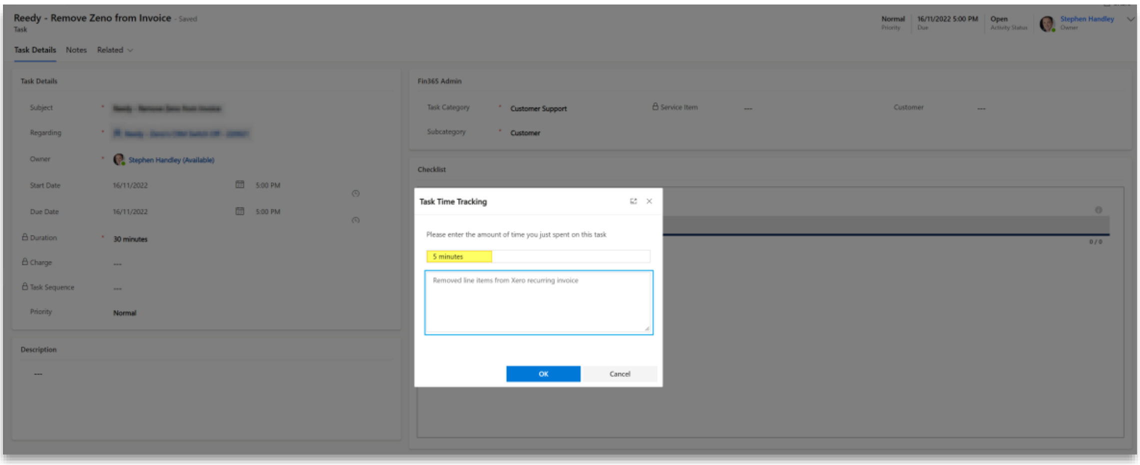
A new (Service Period – Calculate Service Fees) Global Variable has been created to allow this feature to be turned on.



Service Period – Calculate Service Fees Global Variable

Task Time Entry

Previously, it was only possible to select from a pre-defined set of times when creating a Time Entry. In this release, we've added the ability to manually enter a variable number of minutes. We've also added a Note field so you can capture details about the work done on each Time Entry record.



Edit/Delete Security Roles

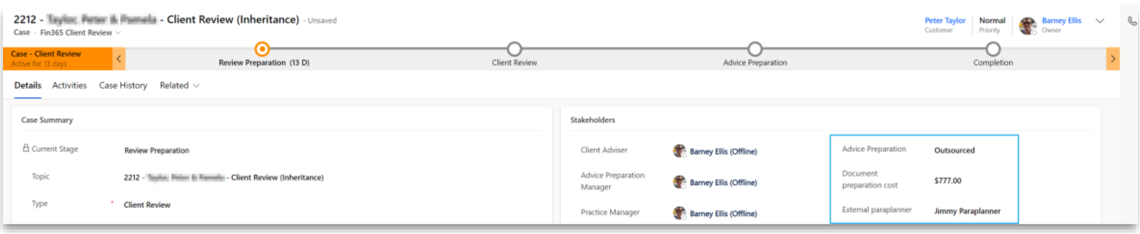
To enable changes to Time Entries, we have added two new Security roles that can be assigned to Users.

Paraplanning fields added to Cases

Consistent with the changes made for Opportunities in the previous release, the following fields have been added to Cases

- Advice Preparation (Internal or Outsourced)
- Document preparation cost
- External paraplanner

On our default form. the last 2 fields only display if the Advice Preparation field is set to Outsourced.



Cases Paraplanning Fields

Re-open Professional Development activity

A new workflow has been created that enables a previously closed Professional Development activity to be re-opened.

Forms

Entity	Form	Details
Company/Account	Fin365 Customer	Added Client Since and Total Charge fields
Household	Fin365 Main	Added Client Since and Total Charge fields
Contact	Fin365 Personal	Added Client Since and Total Charge fields
Opportunity	Fin365 Main	Added Total Charge field
Case	Fin365 main forms	Added Total Charge field
Email	Fin365 Main	The Regarding field has been moved up under the Subject field

Views

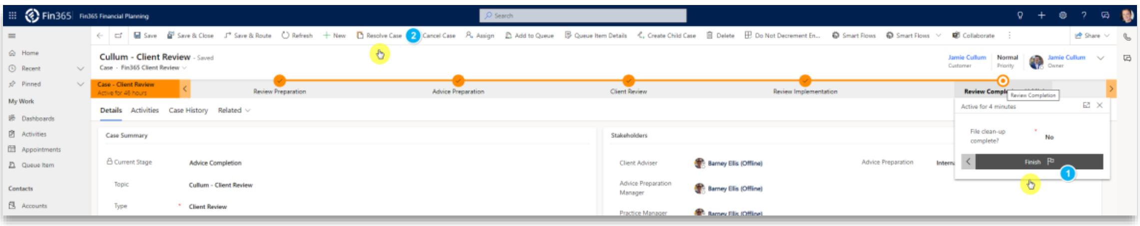
The following changes have been made to System Views

Entity	View	Changes
Insurance Benefit	Associated Insurance Benefits	Benefit name column has been added

Behavioural Changes

Closing a Client Review Case

Historically, a Client Review Case could be closed with a single step. When the Finish button was clicked a workflow would automatically resolve the Case in the same step. However, once we added additional Case processes (e.g. Client Request, Insurance Claim), this behaviour caused issues when trying to switch between process types. We have, therefore, removed the automatic resolution, requiring Users to now Finish the process and resolve the Client Review Case manually.



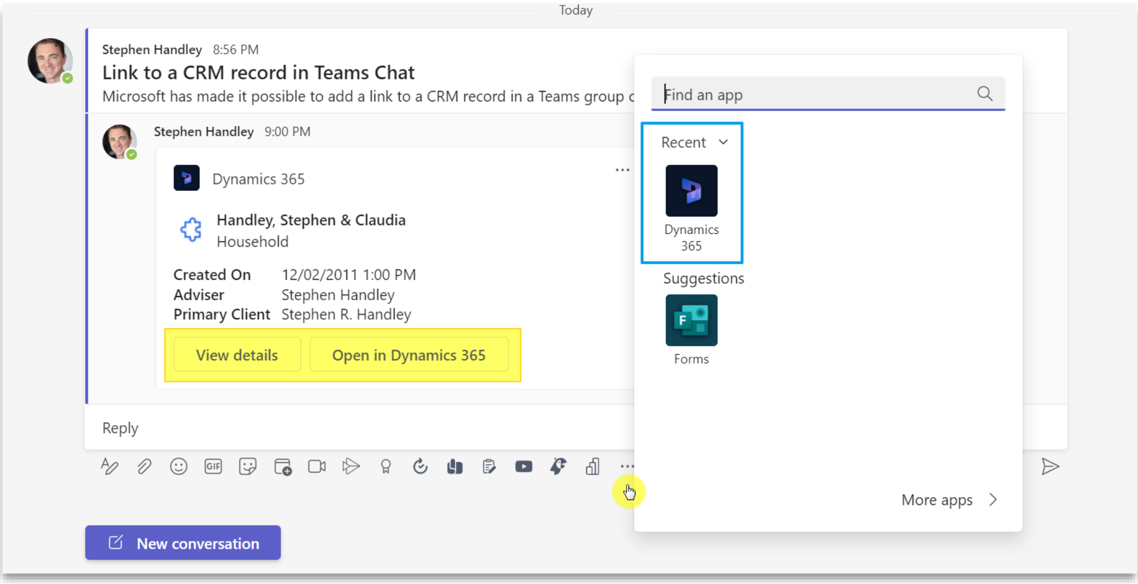
Fin365 Client Review Case Completion Steps

Microsoft Enhancements

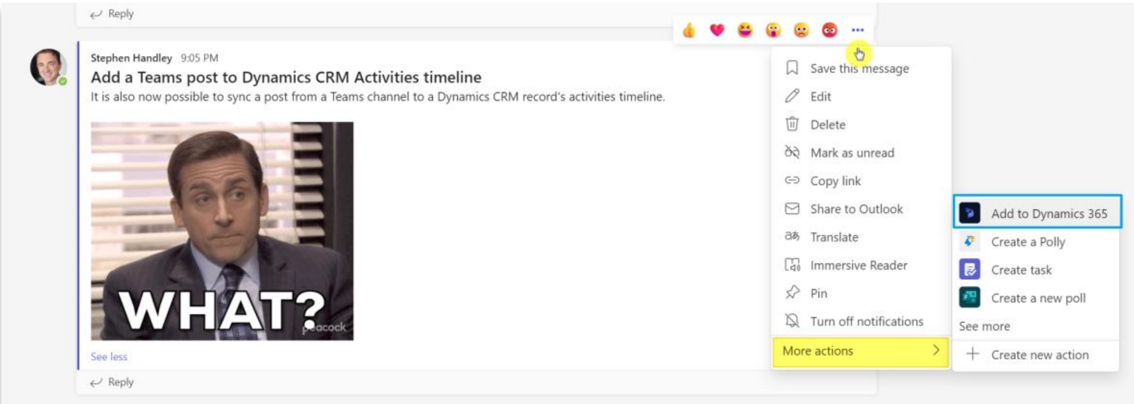
Microsoft generally roles out two major releases each year. Detailed release notes are published on their website. For convenience, we've listed some of our favourite recent enhancements below.

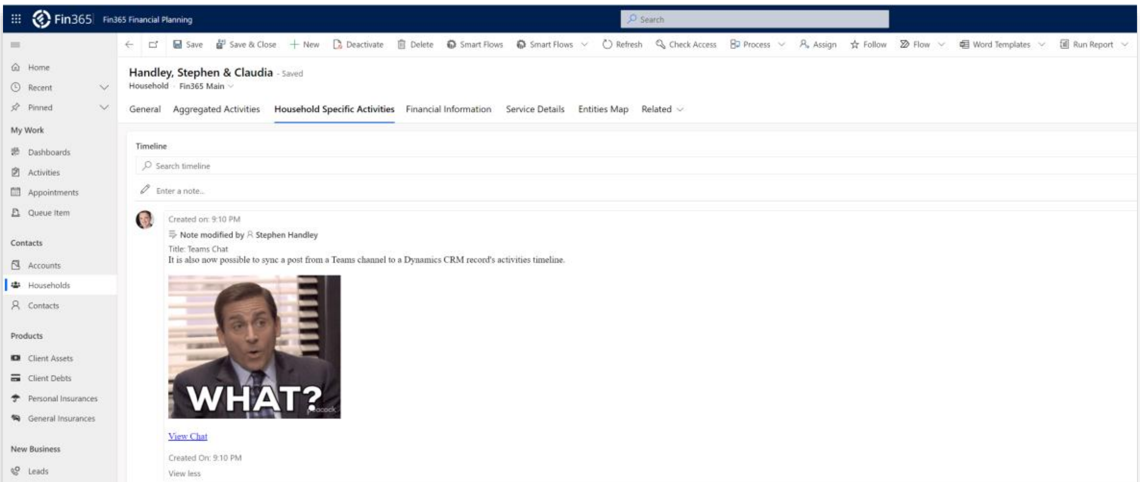
Dynamics CRM & Teams integration enhancements

Add Dynamics CRM record to Teams Chat



Post Teams chat to Dynamics CRM Activities Timeline





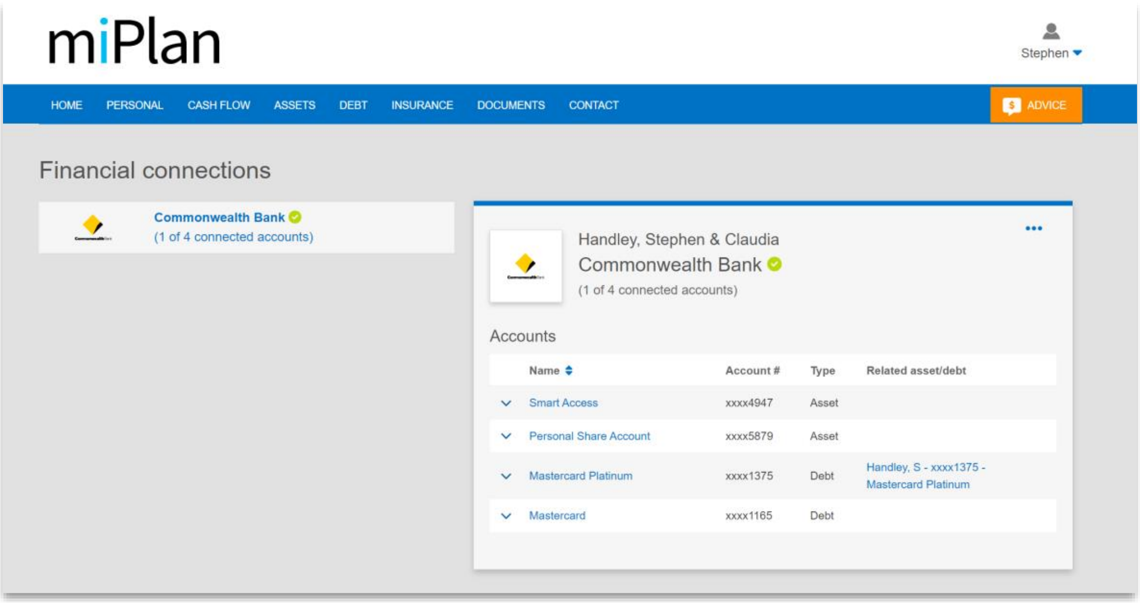
Add Teams chat posts to Dynamics CRM Activity Timelines

Fin365 Portal Update

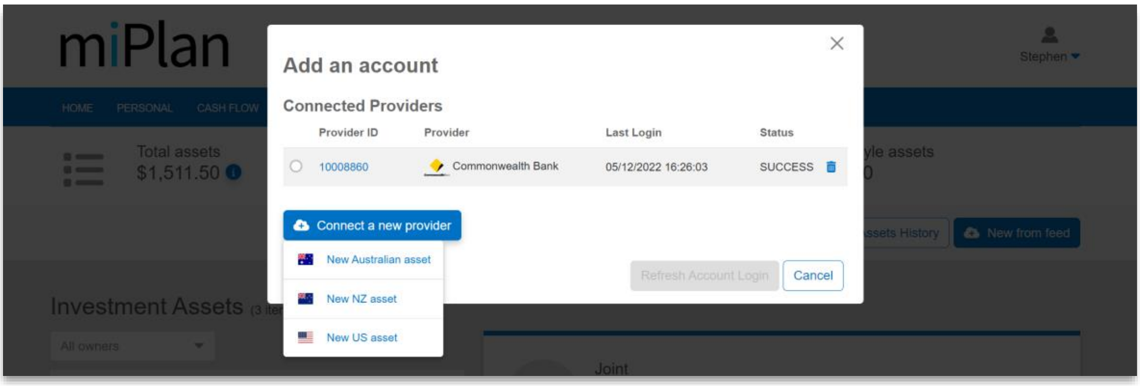
Along with our latest CRM release, we're also releasing the following updates to our Web Portal.

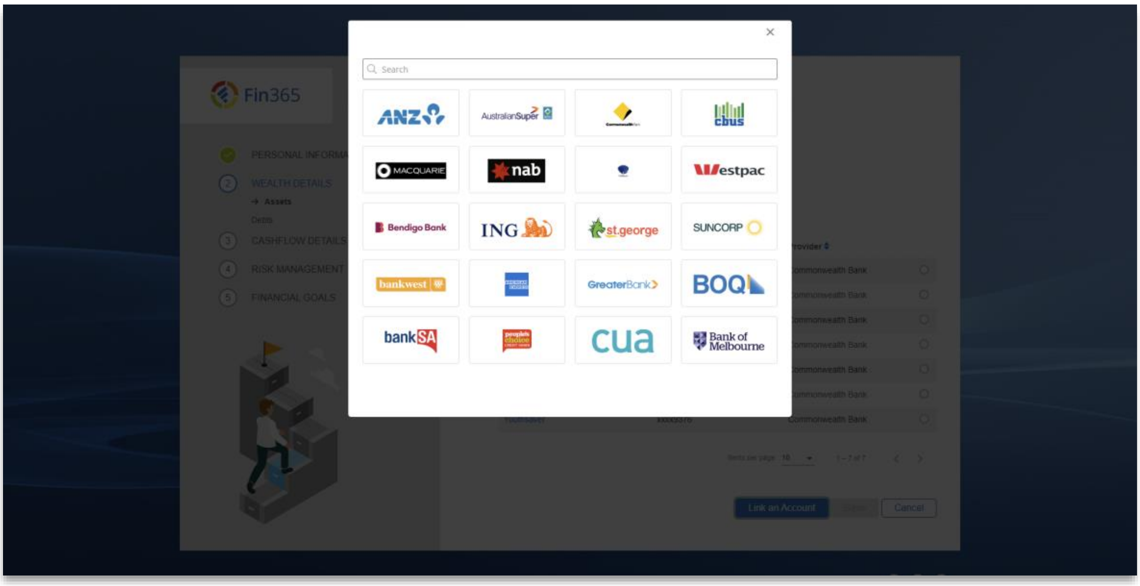
Envestnet Yodlee Enhancements

Envestnet | Yodlee is one of the world's leading financial services data and open banking provider. Fin365's integration with Yodlee delivers automated data feeds from hundreds of global financial institutions, including banks, stock trading and industry superannuation funds. In this release, we've enhanced the reporting of Client connections.



We've also made some significant improvements to the experience in our Client Portal, which we hope will dramatically improve uptake by clients.



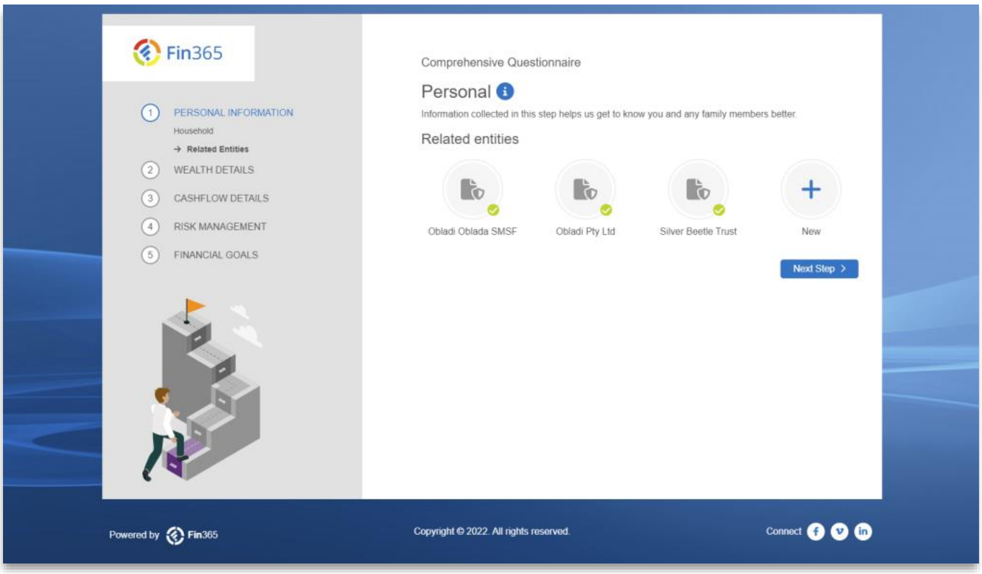


Fin365 Yodlee Integration

Xero Practice Manager

One of our most anticipated integrations in recent times, we're happy to FINALLY announce that our integration with Xero Practice Manager has been released to the wild. In this first release we're mimicking the functionality in our existing WorkflowMax integration. I.e.

- Two-way sync of Xero PM Clients with Fin365 Households/Companies
- Two-way sync of Xero PM Contacts with Fin365 Contacts
- Copying of Xero PM Jobs/Tasks to Fin365 Cases/Tasks to capture Xero PM activity against Clients in Dynamics CRM



Insignia (IOOF) Data Feed

In this release we've added support for Insignia's IOOF data feed