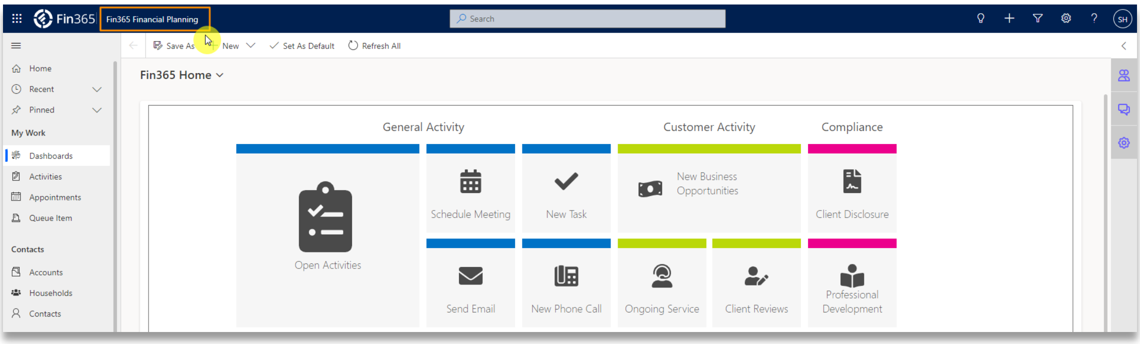
Fin365

CRM Version 9.0 Release Notes

June 2023

Welcome to Fin365 CRM v9.0. 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.

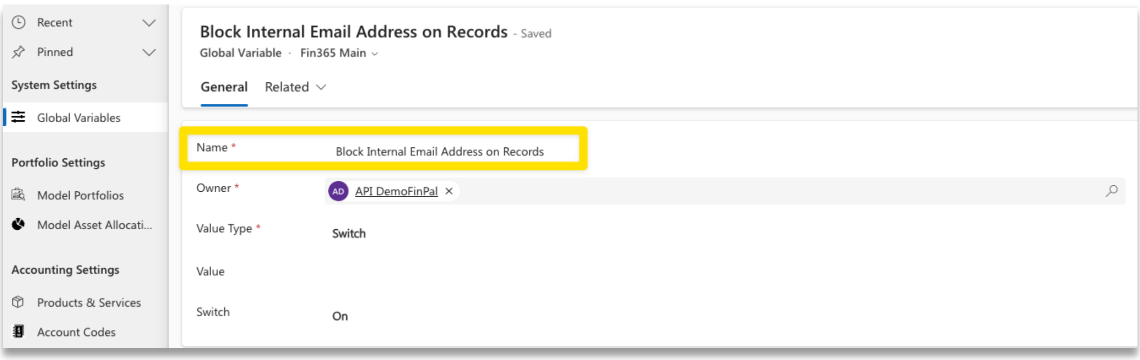


New Features

Blocking Internal Email Addresses

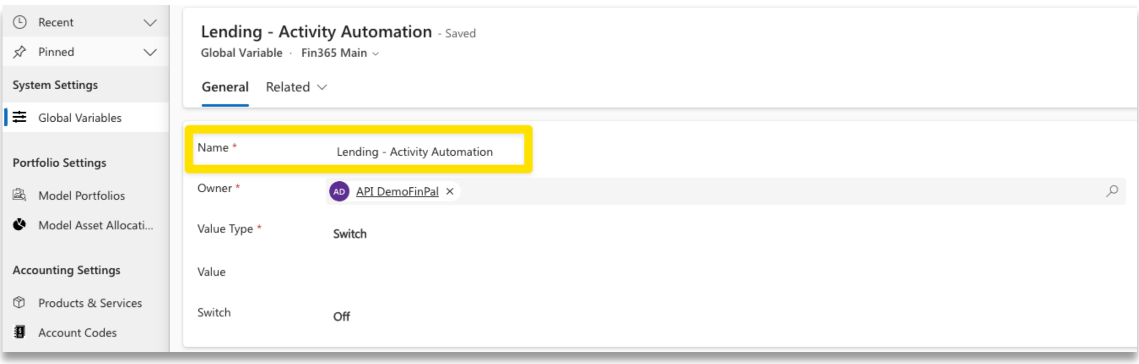
We've added a new Global Variable called ***Block internal Email Address on records***. This prevents users from creating a contact, lead or company record using an internal email address.

This feature prevents accidental or deliberate tracking of sensitive internal emails between staff members as well as issues when accessing the Fin365 Portal.



Lending Process Automation

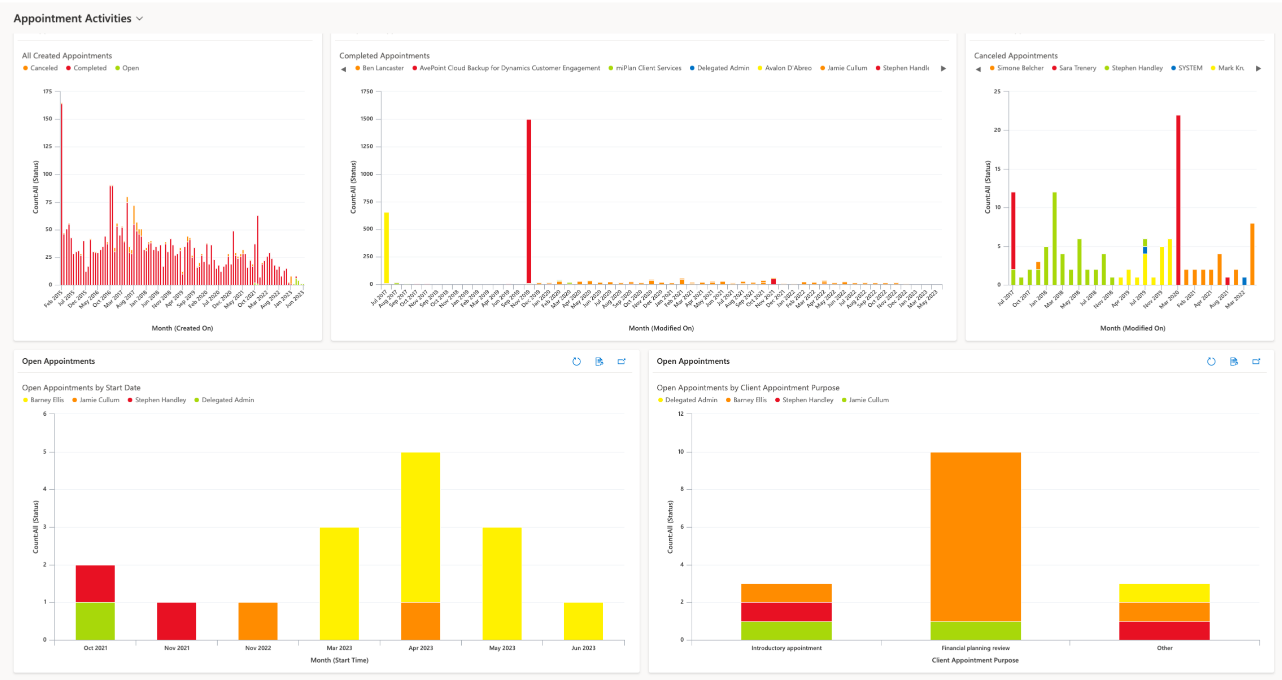
Within the Fin365 Lending application we have added a Global Variable to turn off the automation on the Lending process flow. The Global Variable is off by default.



New Dashboards

We've added the following dashboards to help you gain a better overall picture of the activities within your CRM.

- Appointment Activities
- Completed Tasks and Time Entries
- Open Review Cases
- Phone Call Activities
- Resolved Review Cases
- Service Period
- Task Activities



New Calculated Fields

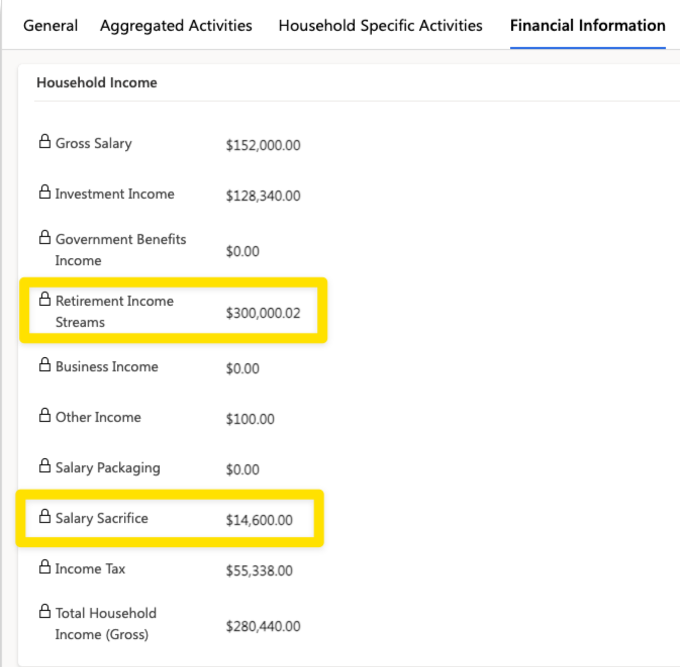
We've added two new calculated fields to both the Household and Contact forms.

Retirement Income Stream

- The sum total of *Client Income* records with an income type set to *Investment Income* and the *Investment Income Type* is set to one of the following:
  - Account Based Pension
  - Annuity Income
  - Defined Benefit Pension
  - Transition to Retirement Pension

Salary Sacrifice

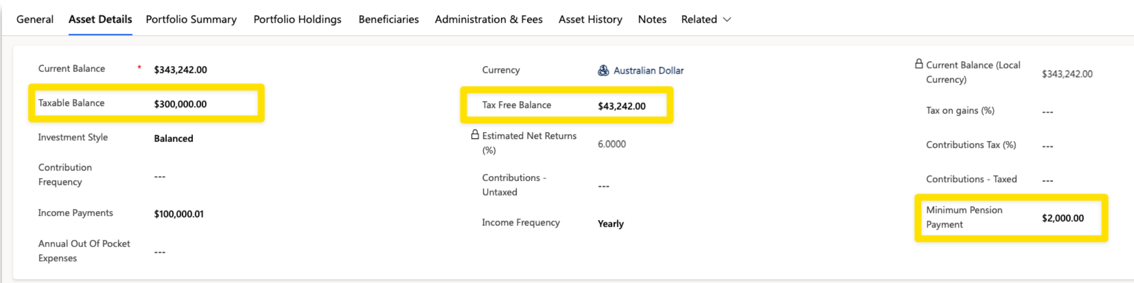
- The sum total of *Contributions – Taxed* on all *Client Assets* where the primary client matches.



New Fields

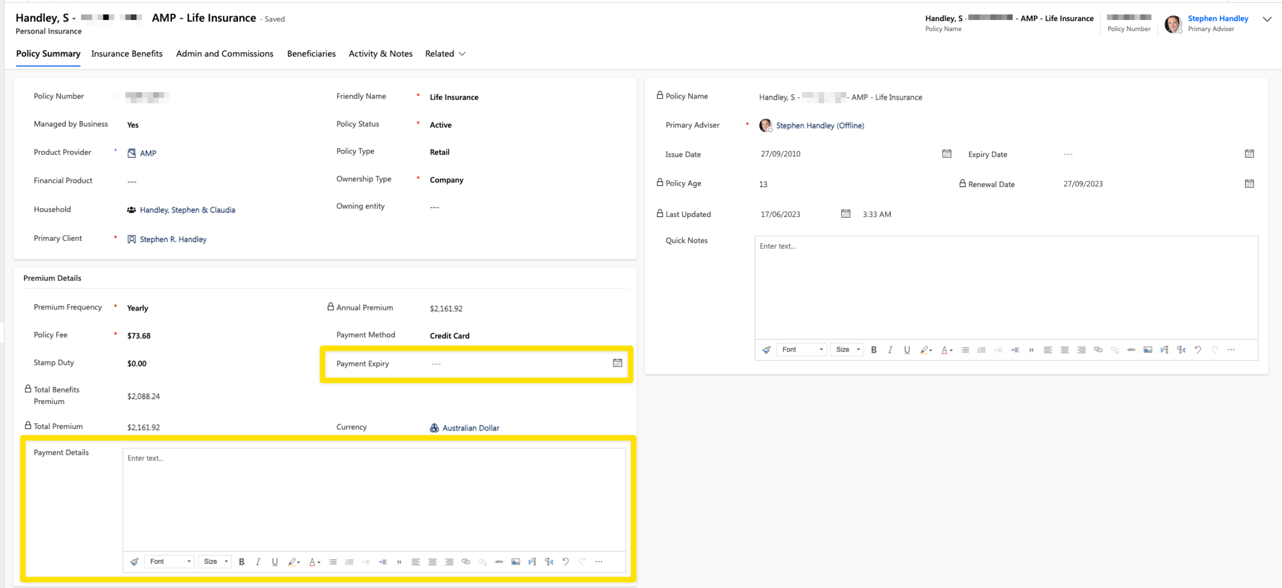
Client Asset

- Added *Taxable Amount* & *Tax-Free Amount* fields, which will show when Asset is of type Superannuation/Retirement Income Stream.
- Added *Minimum Pension Payment* field, which will show when Asset is of type Retirement Income Stream.
- Business Rule to hide/show above fields.



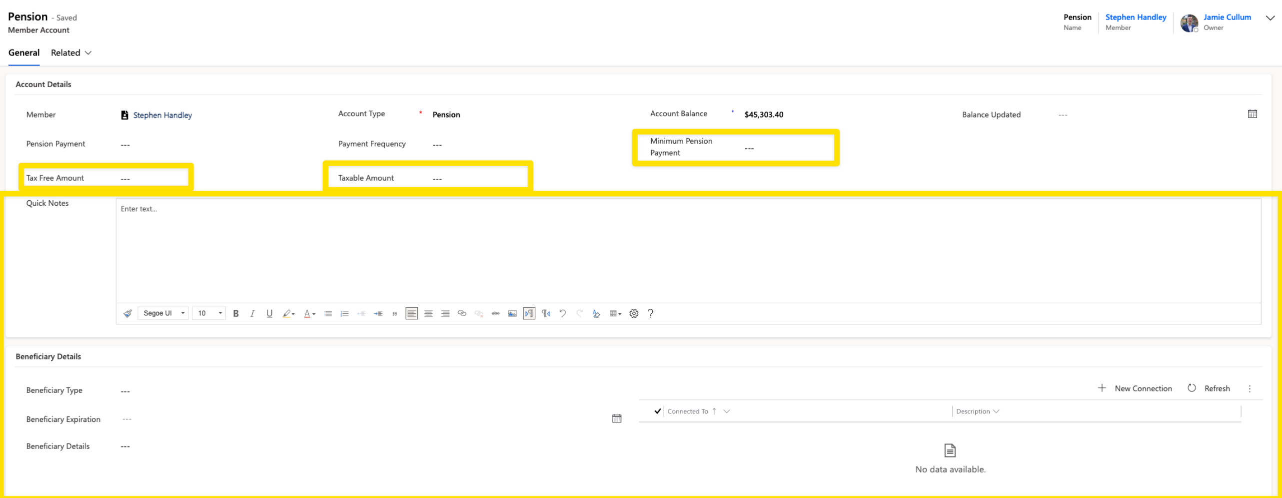
Personal Insurance

- Added *Payment Expiry* field.
- Added *Payment Details* text box (e.g. to store account details of payment method).



(SMSF) Member Accounts

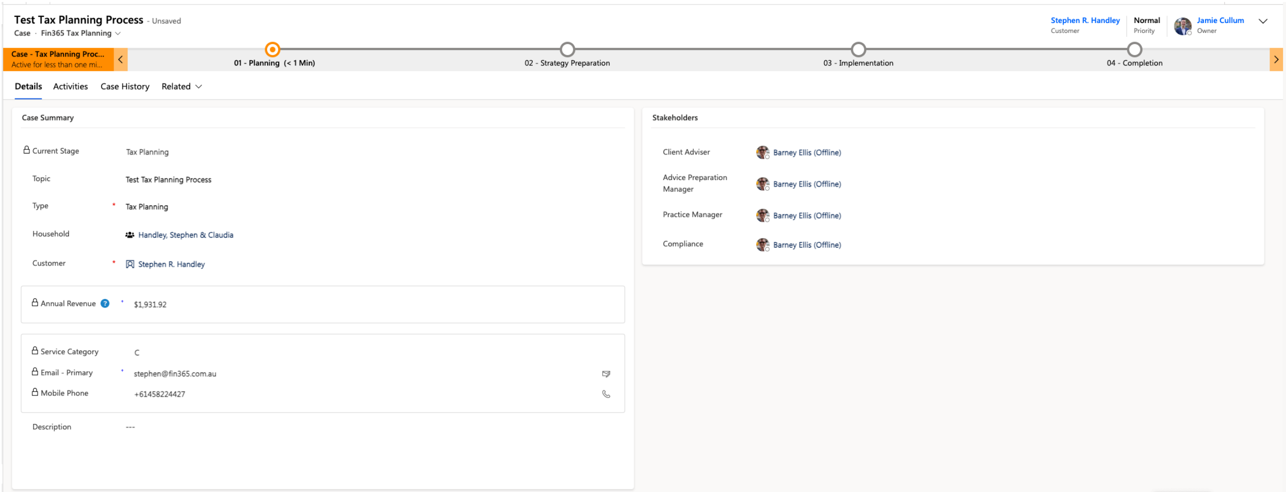
- Added *Taxable Amount* & *Tax Free* Amount fields.
- Added *Minimum Pension Payment*, *Pension Payment* & *Pension Frequency* fields, which will show when Asset is of type Pension.
- Business rule to show/hide above fields.
- Added a *Quick Notes* field to capture additional comments.



Accounting Process Flow

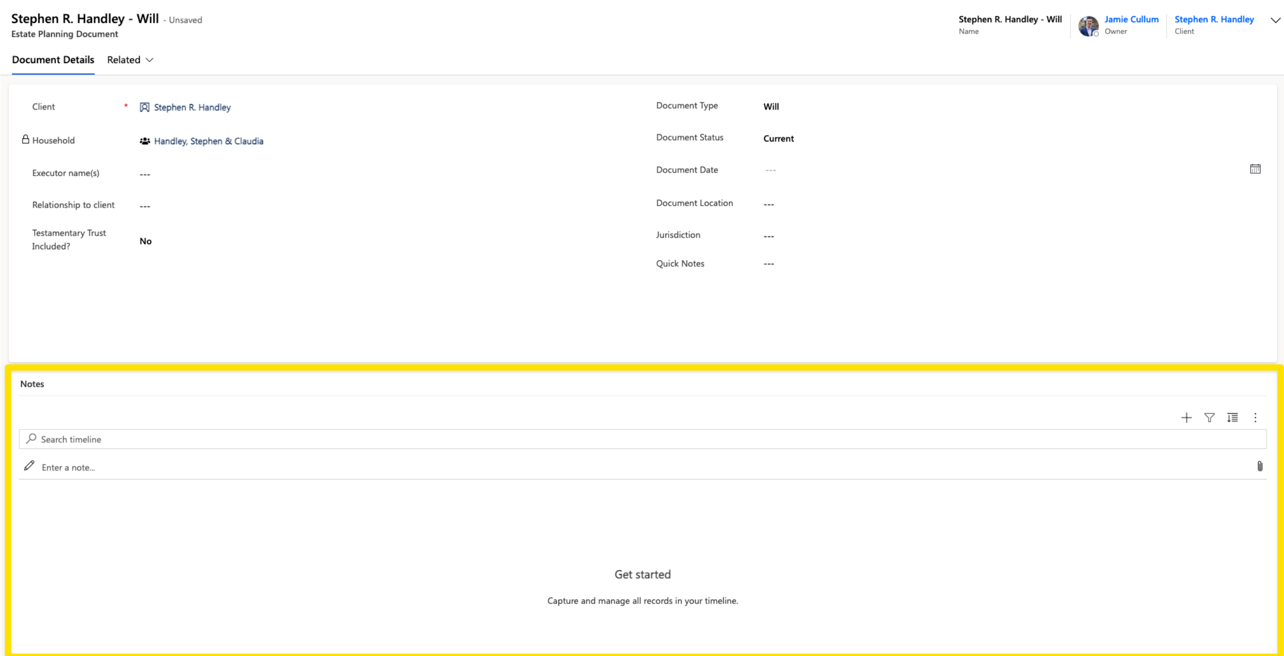
We've created an Annual Tax Planning process flow found within the **Fin365 Accounting** application. This process was based on the feedback of our accounting customers. The process flow can be found within the **Case** entity as the Annual Tax Planning process is designed to review existing clients.

In a future release, we will develop Accounting specific process flows for Opportunity/New client onboarding.



Estate Planning and Client ID Records

We've added the ability to add notes directly to an Estate Planning and Client ID record. This allows users to add an attachment of the Estate Planning document or ID directly to the CRM record.



Enhanced Features

Fin365 Dashboard

The Fin365 Home tiled dashboard is now responsive to screen resolution and will scale as you increase or decrease the screen size.

Task Sequences

When you cancel a task within a task sequence the flow will be stopped and no more tasks will be created in the sequence.

Account Transaction Types

Added Concessional Contribution and Regular Pension Payment transaction types to the account transactions found under the client asset.

Client ID Types

Added *Accountant Certificate* and *W8-BEN* to the option set found under the Client Identification entity.

Phone Call Quick Create

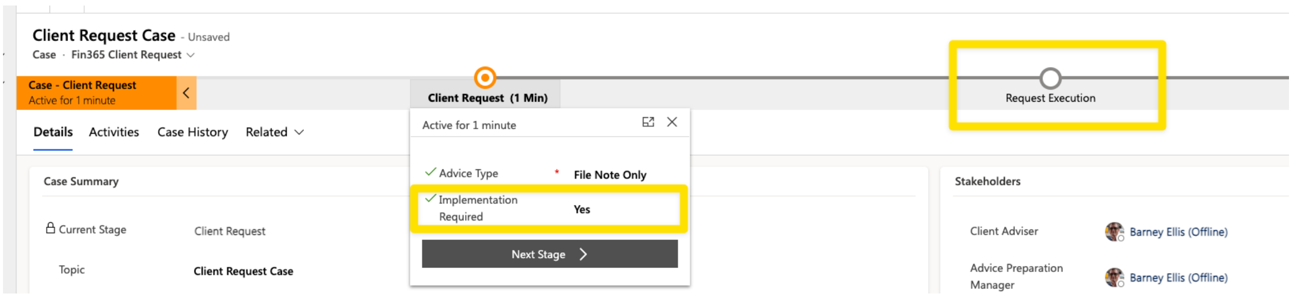
Added all the fields on the Phone Call form to the quick create form to allow for easier entries.

New Standard Product Providers

We've added GIO Insurance and Integrity Life to the list of product providers that ship as standard with the CRM.

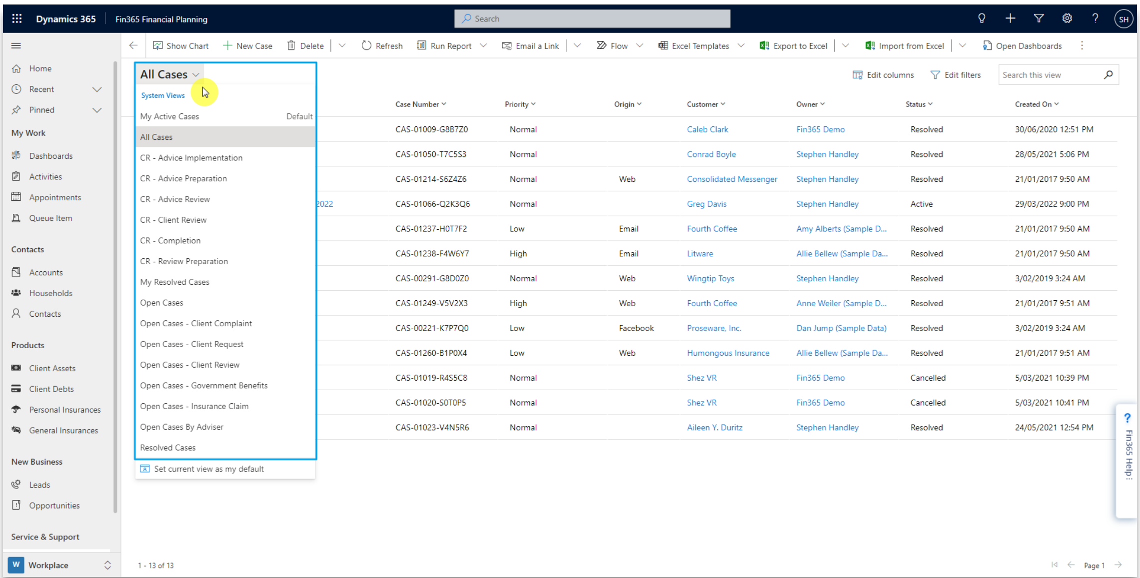
Improvement to the Client Request Case

We've added an option under the client request that now asks whether or not there is implementation required for the process flow. Selecting yes now reveals a Request Execution



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:

Entity	Old View Name	New View Name
Household	Active Households	
Household	Compliance and Review Dates	
Household	Fin365 Data Integrity – Households	
Household	Inactive Households	
Household	My Active Households	
Household	Overdue Reviews	
Household	Reviews Next Month	
Household	Reviews This Month	
Household	Upcoming Reviews By Adviser	
Contact	Active Customers	Active Clients
Contact	Active Non-Customers	Active Non-Clients
Contact	All Active Contacts	All Active Contacts (Client and Non-Client)
Contact	All Active Primary Clients	
Contact	All Active Spouse Clients	
Contact	All Contacts	All Contacts (Active and Inactive)
Contact	Client Birthdays – This Month	Client Birthday – Upcoming
Contact	Fin365 Data Integrity – Contacts	
Contact	Inactive Contacts	
Companies	Active Accounts	Active Client Entities
Companies	Active Customers	All Active Companies (Customer and Non-Customer)
Companies	All Accounts	All Companies (Active and Inactive)
Companies	Fin365 Data Integrity – Client Entities	
Companies	My Active Accounts	My Active Client Entities
Companies	Product Providers	
Companies	Referral Partners	
Companies	Service Providers	

Bug Fixes

Xero Account Codes

- We identified a bug where the CRM limited the number of characters you could have on the account code field. This has now increased to 30 characters to match Xero's limit.

Service Periods

- When using 'write-in' service items on a Service Period there was an error which prevented the system from completing the Service Period. This has now been resolved.

Authority to implement field locked in the Client Review Process

- A business rule prevented some businesses from moving past the Authority to Implement step in the Client Review Process due to a field being hidden. This only impacted users who complete their Record of Advice prior to the appointment.

Emails set regarding a Service Period

- A bug with the task time tracking that was implemented in the last release prevented users from setting an email regarding a Service Period. This has now been resolved.