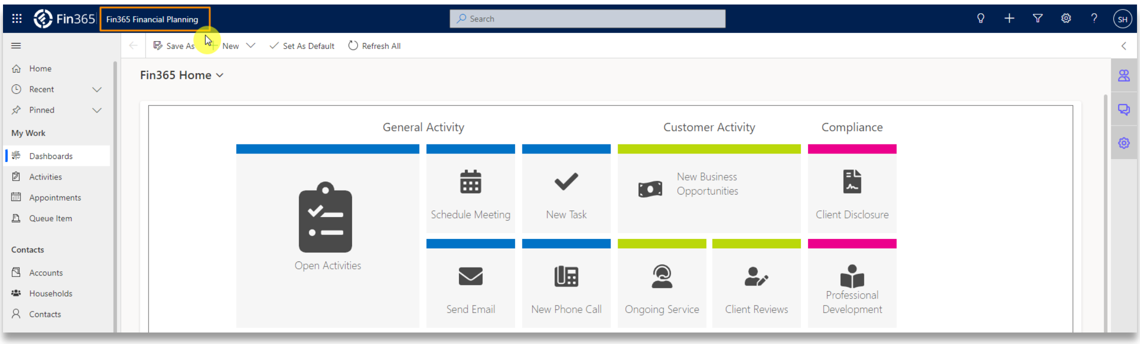
# Fin365

## CRM Version 9.7.1 Release Notes

August 2024

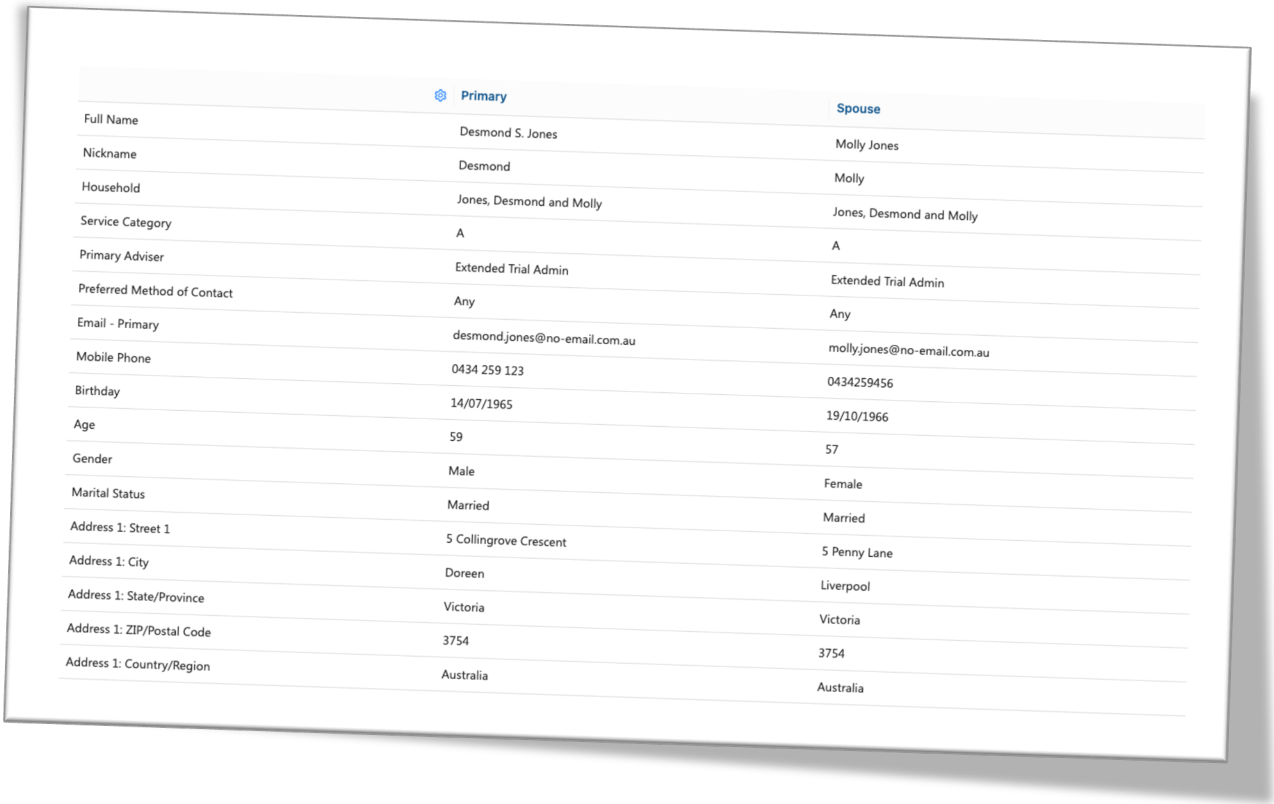
Welcome to Fin365 CRM v9.7.1. This release is a major release packed with new features and improvements to existing features.

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

## Primary/Spouse Side-by-side



| | Primary | Spouse |
|---|---|---|
| Full Name | Desmond S. Jones | Molly Jones |
| Nickname | Desmond | Molly |
| Household | Jones, Desmond and Molly | Jones, Desmond and Molly |
| Service Category | A | A |
| Primary Adviser | Extended Trial Admin | Extended Trial Admin |
| Preferred Method of Contact | Any | Any |
| Email - Primary | desmond.jones@no-email.com.au | molly.jones@no-email.com.au |
| Mobile Phone | 0434 259 123 | 0434259456 |
| Birthday | 14/07/1965 | 19/10/1966 |
| Age | 59 | 57 |
| Gender | Male | Female |
| Marital Status | Married | Married |
| Address 1: Street 1 | 5 Collingrove Crescent | 5 Penny Lane |
| Address 1: City | Doreen | Liverpool |
| Address 1: State/Province | Victoria | Victoria |
| Address 1: ZIP/Postal Code | 3754 | 3754 |
| Address 1: Country/Region | Australia | Australia |

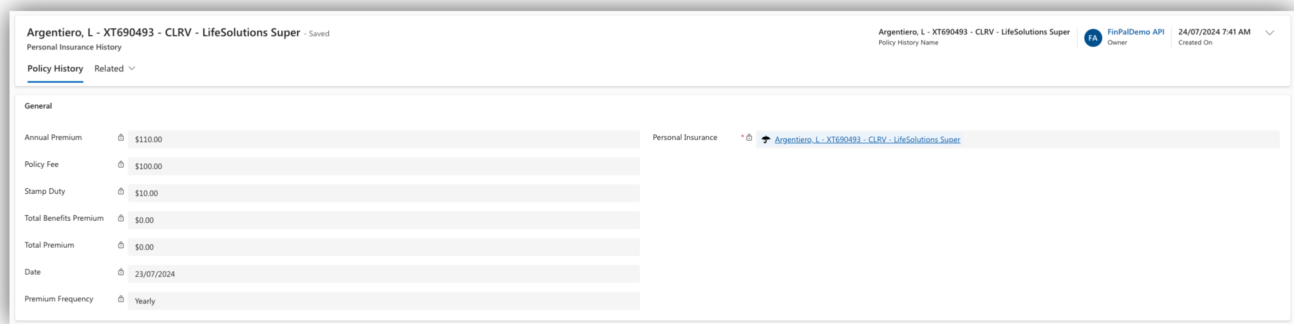
We've added a new way to display the primary and spouse on the Household entity. This enhancement makes it easier to compare primary and spouse information side-by-side. The benefit of this new view is that it is fully customisable. You can import an existing view that you like or create your own.

We have limited the customisation to organisation level and only users with the Business Manager security role can edit this.

# Enhanced Features

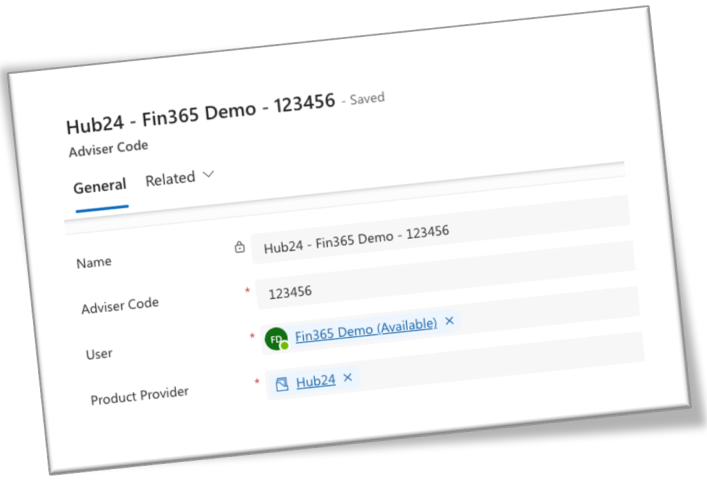
## New Entities

### Personal Insurance History and Insurance Benefit History




We've added two new entities: 'Personal Insurance History' and 'Insurance Benefit History.' These entities are designed to track personal insurance details, with fields for Annual Premium, Policy Fee, Stamp Duty, Total Benefits Premium, Total Premium, Date Captured, and Premium Frequency. This allows for detailed record-keeping and analysis of personal insurance data over time. If a change has been made to either a personal insurance or underlying benefit a history record will be created on the 1$^{st}$ or 15$^{th}$ day of the month.

### Adviser Code Entity

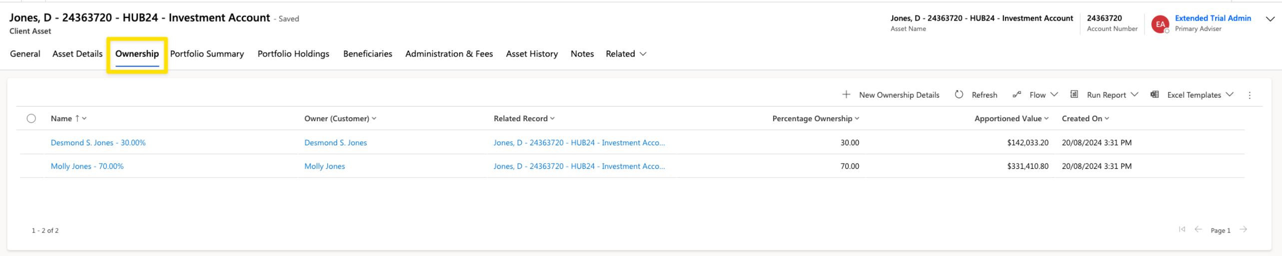



A new entity has been created to manage adviser codes. This entity includes fields such as a text field for 'Adviser Code,' lookups for 'System User' and 'Accounts Product Provider,' and a status field to indicate whether the record is Active or Inactive. The name of each record is automatically generated in the format 'Provider - System User - Adviser Code' (e.g. Praemium - Greg Davis - 12345). This entity streamlines the management and tracking of adviser codes, improving organisational efficiency.

### Notes

- To control access to who creates and manages adviser codes we have created a new security role called 'Product Provider Administrator'.

## Apportioned Ownership Entity



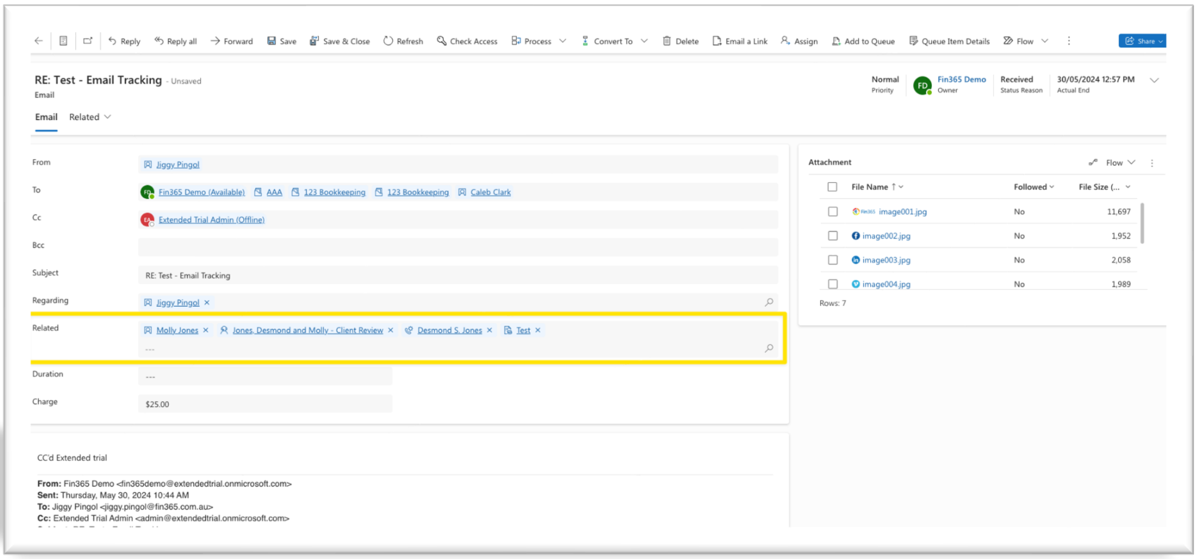
In response to customer feedback, we have introduced the new Ownership Details entity to enhance the tracking and management of different ownership structures. While the basic option set we have had for years serves a large portion of scenarios there are some cases where customers need to capture more details such as when clients have a house owned as tenants in common. The new Ownership Details entity allows you to specify differing percentages to correctly track the ownership of the asset/debt.

## Updated Option Sets

| Option Set Name | Name |
|---|---|
| Payment Method | Platform |
| | Employer Paid |
| Insurance Benefit Type | Accidental IP |
| | Ancillary Benefit |
| Insurance Benefit Level | Other |
| | Optimum |

## New Fields

### Email Activity




A new related field has been added to the email activity, allowing users to associate multiple entities with a single email record. This enhancement is currently limited to email activities, but it's expected that Microsoft will expand this functionality to other activities in the future. This feature aims to improve the traceability and relevance of email communications within the CRM.

### Household and Case Forms

We've added the 'Advice Scope' field to both the Household and Case forms. Previously available only on the Opportunity entity, this field has been highly valued by our customers, so we've expanded its availability. This addition helps in clearly defining the scope of advice provided, ensuring consistent documentation across related entities.

The field is a multi-selector allowing you to select the services that you provide to each household with the following options available:

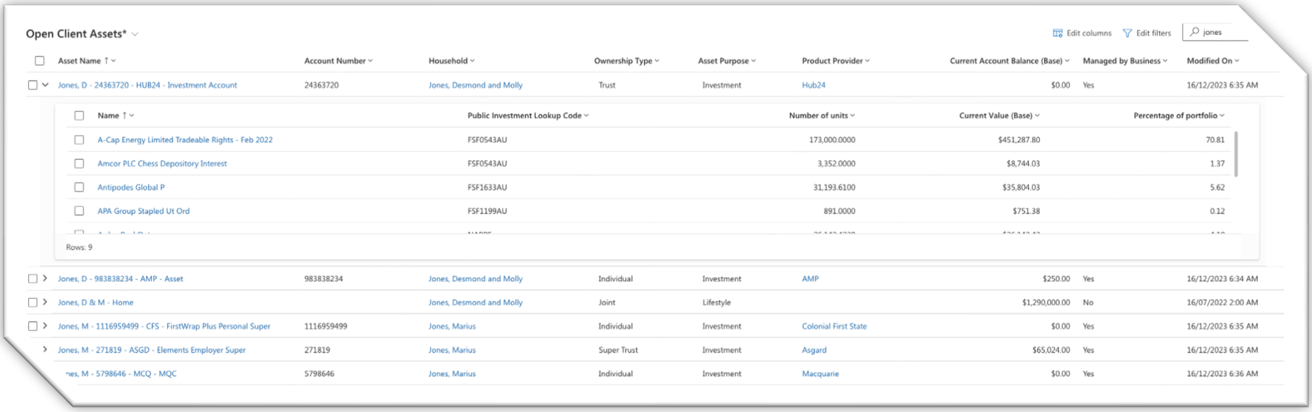
- Aged Care
- Business Insurance
- Cashflow Management
- Debt Management
- Estate Planning
- Investment
- Personal insurance
- Property
- Retirement
- Superannuation

### Lifetime Revenue Added to Company Entity

The 'Lifetime Revenue' field which has been popular on the contact entity has been added to the Company entity. This field helps in tracking the total revenue generated by a company over its relationship with your business.

# New Views

## Nested Tables




We've introduced a new view for Client Assets and Personal Insurance featuring nested tables. This view allows users to see the underlying investment holdings of the client asset and the underlying insurance benefits without going into the record itself.

# Bug Fixes

## Household Aggregated Revenue:

We identified and resolved an issue with the property category within the Household aggregated revenue calculations. This fix ensures that revenue from properties is accurately reflected in the total figures, providing more reliable financial data.

## Retirement Income Streams:

An error was found where retirement income streams were not being included in the total gross revenue on the Household entity. This bug has been fixed, ensuring that all sources of income are accurately aggregated.

# Other Updates

## User Table

We've cleaned up the related menu on the User table, improving the user experience by reducing clutter and making it easier to navigate related records.