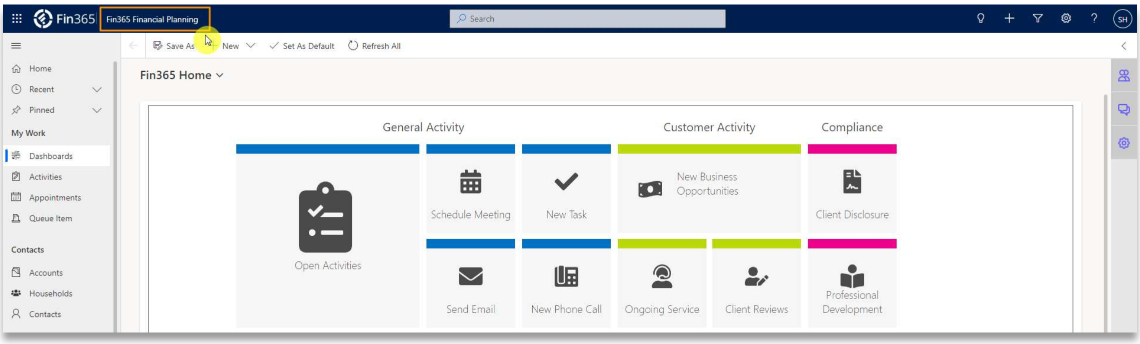
CRM Version 9.7.3 Release Notes

October 2024

Welcome to Fin365 CRM v9.7.3. This release is a minor release addressing certain bugs and minor feature enhancements.

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.



Fixes and Enhancements

Email Automation

- Resolved issues with the email set regarding automation, improving the workflow associated with automatically setting the regarding field based on the activity parties of the email.

Public Investment Holdings

- Fixed an issue where in certain scenarios, the overnight data feed process would overwrite the $0 balance of a closed account based on current day unit prices. Assets with a status marked closed will no longer have their current account balance updated by the data feed.

Spouse side-by-side view on the Household

- Corrected the headings in the new spouse side-by-side control to say "Row edit" instead of "Column edit," improving clarity and usability.

Service Period Automation

- Added a global variable to prevent the system from auto-calculating the dates on the Service Period upon creation. This was a request to allow some customers to customise the entity and create their own dates upon creation.

CRM Icon Rendering

- In the latest CRM release from Microsoft some of the icons we have used for some entities weren't rendering correctly in the new UI. There have been updates to some icons to render correctly/improve compatibility with Microsoft's changes.

Client Engagement Process Business Rule

- Added a new business rule to the Client Engagement process that automatically updates the current phase field in line with stage changes.

Active Household View

- Re-added the default active households view that was missing from the previous release.

New Features

Investment Holding Workflow

In the CRM, when investment holdings are created, the system automatically copies the name from the underlying public investment table. However, after the initial creation, there has been no process in place to ensure that the name stays updated if changes occur in the investment database. This can result in slight variations in names for some investment holding records. For example, "Qube Holdings Limited" and "Qube Limited Ord" may both appear in the system due to updates in the underlying data.

While this may appear as a data discrepancy to some users, the core financial data, such as unit prices, remains accurate. To resolve this, we have introduced an on-demand workflow that can be manually triggered to update the names of investment holdings, ensuring consistency with the underlying investment database. This workflow can be run periodically to maintain up-to-date names and ensure data clarity.

CDM Integration

- Enhancements were made to the CRM to support the new integration with CDM solutions.

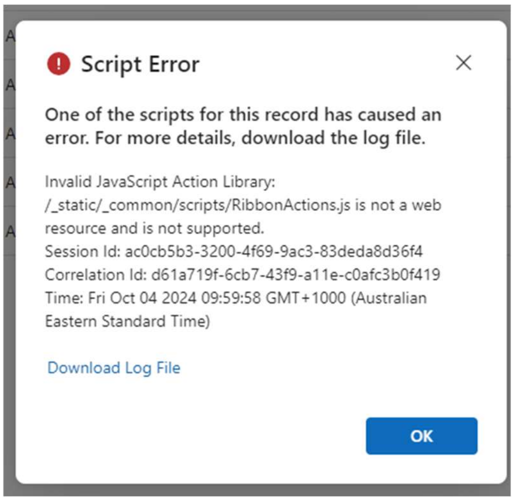
Known Issues

The following are known issues that will be fixed in future releases. Please contact help@fin365.com.au if you would like assistance with any of the following.

- Microsoft have changed the Advanced Settings UI. If a user tries to create a new document template or upload an excel spreadsheet using the data import functionality, the user receives a business process error. For now, we recommend going to the legacy UI by navigating to the link below. You will need to adapt your CRM URL and append the following on it.

  /main.aspx?settingsonly=true

  e.g. https://fin365example.crm6.dynamics.com/main.aspx?settingsonly=true



- Changing the owner of a task changes the owner of the time tracking events. This does not impact the name of the time entry nor the dollar calculation. This will be fixed in the next release, a temporary fix is possible by changing the cascading rules.