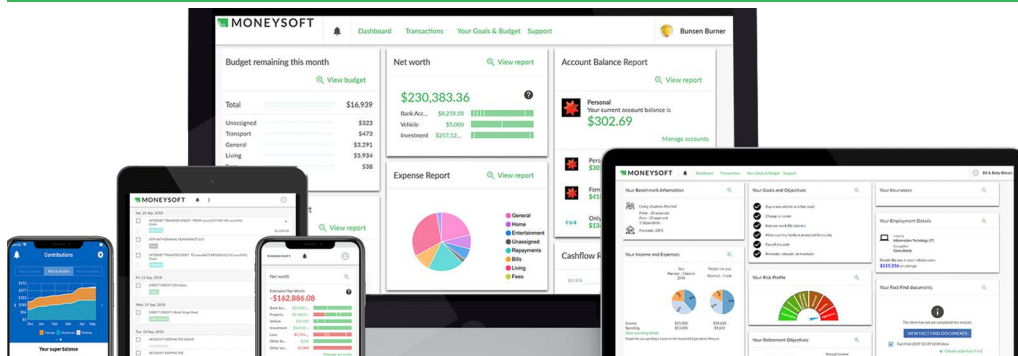


eNEWSMONTHLY



The new Moneysoft | Xplan IPS Integration is now live!

The new Moneysoft | Xplan IPS Integration is now live, with balances and transactions from any bank, loan, credit card, investment or superannuation accounts (as well as properties) linked in Moneysoft able to mapped to the clients account in Xplan.

Once accounts are mapped in Xplan they will automatically be visible in that clients IPS module. Further, any accounts added in IPS can also be linked to the clients Assets and Liabilities in their Xplan account.

Integration Benefits

- Improved efficiency - By having clients live bank, loan, credit card, industry fund balances etc linked in the Assets and Liabilities module in Xplan, there is no more need to have to manually collect and update balances in the clients Xplan account at review time or when generating advice documents
- Improved reporting - You can now generate reports through Xplan (as well as Moneysoft) that encompass all the client's assets and liabilities including detailed portfolio performance reporting.

For more information, [view this short video](#) to see how the new integration works and if you would like assistance setting up this up on your own Xplan account please do not hesitate to contact us.

New Moneysoft | Xplan CRM Integration

Off the back of the Moneysoft | Xplan IPS integration and the upcoming release of the Moneysoft Digital Fact Find, the next development will be a two-way integration between Moneysoft and Xplan with data collected through Moneysoft's Fact Find synced directly into the clients Xplan profile or data in Xplan synced into the clients Moneysoft account.

Peter Malekas - Director and Founder

A View to the Future

Moneysoft has some big-ticket items either recently released, such as the brilliant XPLAN IPS integration, or in development and close to release. We understand some of these things have been on the radar for a while so I'd like to give you an honest-to-goodness update on where we sit, when you can expect things to be ready and why there might have been delays (if any).



Yodlee Upgrade

Let's start with the Yodlee upgrade. We've been working on this for about eight months now and it may be a surprise to many of you to know that we've actually had a version of it live for over three months in our "spare change investing" app, SuperCents. Getting the upgrade into our PFM applications is a different ball game though, and we are taking our time to make sure we get it right!

PFM MkII is live in the USA now, NZ next and then all our wonderful customers and clients in Australia will come next. The reason we've done it this way is to ensure we deliver the least disruptive upgrade possible. At this stage we believe you can expect to see something in late July or early August. Yes I know it's taking a while but it is coming.

Build your own Fact Find

Some of you have been on the Fact Find journey with us for quite a while, some are new to it. For those who have worked with us and seen it evolve, you'll know that Moneysoft's Fact Find is much more than that! We're ever so close to having our dream ready - fully customisable and configurable client engagement journeys and workflows, built to your specification, with automatic data collection and external system integrations all included. With the XPLAN CRM integration and eSignatures forming part of the whole bundle, we know you're going to think it's been worth the wait. You will truly be able to build your own Fact Find (or any other engagement journey for that matter) with Moneysoft.

New Pricing and Re-bundling

Creating new products and capabilities sometimes means we get the chance to give our customers even more choice and flexibility. That is exactly what the development of Fact Find has done - so get ready for some exciting new licensing options when we go live. New subscription bundles and associated pricing will be released with the Fact Find software, currently tracking to an end of July release. And rest assured, we will look after our loyal customers before we look after anyone else!

We want to continue to provide more insight to you as to what's going on at Moneysoft - we know we can do a better job of it - so please watch out for these Newsletters to get the latest snapshot. In the meantime, read on for some more fantastic updates from the Moneysoft Team.

Jon Shaw - CEO



Together Australia.

In the coming weeks Adviser Ratings will begin leading a new initiative called, Together Australia, to help the millions of Australians financially impacted by the Coronavirus pandemic.

The Together Australia campaign aims to reach over six million Australians and is designed to showcase the value of advice, increase the profile of

advisers and assist Australian's financially affected.

In support of the campaign, Moneysoft have developed a free Financial Health Check, Fact Find and extended Account Trial. Not only will it help individuals get organised but it will also assist by connecting them with suitable advisers via Adviser Ratings – information at the ready.

We encourage your support by claiming your Adviser Ratings profile (if you haven't already) and include any of the 4 new 'skill sets' specifically relevant to the current climate and 'Together Australia initiative.

- Early Super Access
- Early Super Access PRO BONO
- Financial Hardship
- Redundancy

To claim your profile in Adviser Ratings now, [please click here](#). To learn more about the Together Australia campaign visit together-australia.com.au.

Steve Davis - Head of Sales

AR AdviserRatings
SEEKING HELP

Seeking Financial Advice

Social isolation during COVID has sparked a new thinking among Australians how to live more frugally.

I am experiencing financial hardship

I have been made redundant

I want to access super

Access pro bono financial advice

Change Transaction Balance Signs

We have introduced a new feature allowing clients or their advisers to manually change the balance sign for transactions, where this data does not match the client's expectations.

From the transactions page, select one or more transactions using the check boxes down the left side. Once selected, use the +/- icon in the bottom menu bar to immediately change the balance sign. Click Cancel to close the bottom menu bar once done. Changing the balance sign may mean that they transaction categorisation will need to be updated to correctly reflect the transaction as either an expense or income category. All reports relying on transaction data will also be updated to reflect the change to the transactions balance sign.

Note, only existing transactions are effected by this change. Any future transactions will need to be updated as they come in. You can read the full release notes for the Moneysoft PFM software by checking out the [Biznews Hub](#).

Victoria Cougan - Customer Service Specialist



Mobile App Updates

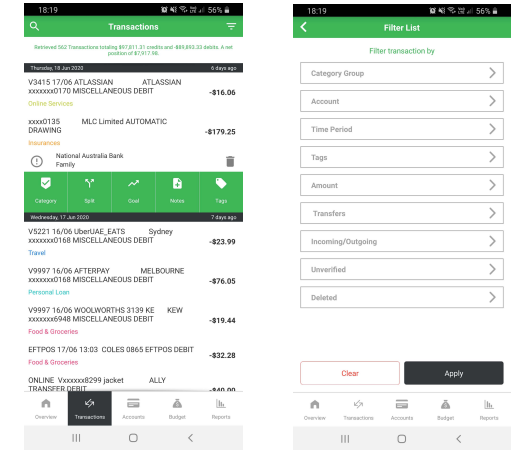
We often receive feedback on how we can make the Moneysoft mobile app better and we want you to know that we are listening.

While we haven't been able to get in everything that we have been asked for, the latest release (out very soon) will have some great new features.

We are introducing improved transactions filters and options that match those you see in the web version. You will be able to filter by account, category, incoming / outgoing, time range, etc. as well as verify or unverify transactions, link to a goal, create and assign tags, etc.

We think these improvements will significantly improve your use of the mobile app and look forward to bringing more features in the future.

Craig Fletcher - General Manager Operations



ADVISER RATINGS

If you have not experienced Moneysoft and the benefits it can deliver for your business, click here to set-up a **FREE TRIAL** account.

TRY NOW - IT'S FREE