



## **moneyinfo 12.3 Release Notes**

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## **Release Overview**

We are delighted to announce the release of version 12.3 of moneyinfo (MI) and moneyinfo Manager (MIM). This document provides details of the new features and enhancements.

As always, we would like to thank our clients for their feedback and suggestions.

Below is an overview of the new features and functionality.

### **1. 2-way integration with Intelliflo Office**

Following a period of beta testing, we can now offer this feature to all companies with an Intelliflo Office feed. This allows you to send plans, assets, and dependants data for a client back to Intelliflo Office from moneyinfo Manager, ensuring data consistency and minimising rekeying.

### **2. Improved client search**

We have enhanced the client search feature which will allow you to search and find clients based on their forename, login username, and login email address (in addition to the existing options to use surname, postcode, and national insurance number.)

### **3. A new "Visit Clients" operator role**

We have changed the roles that enable you to visit or manage a client via moneyinfo Manager. The existing "Access Client" role now only permits an operator to view clients (and perform any actions based on their other roles), including a view of the client summary. It will no longer allow you to log into a client's portal account using the Visit action. A new "Visit Client" role has been introduced that allows you to log into a client's portal account so you can see what the client sees.

### **4. Handling documents with the same file name**

We have enhanced document uploading on moneyinfo. Now, duplicate names are automatically handled with incremental numbering. A pop-up alert offers options to cancel, overwrite, or keep both documents.

### **5. An update to minimum password length**

We have changed the minimum password length for client logins. The new standard will require passwords to be a minimum of 8 characters long. This will not affect any existing passwords but will take effect when a password reset is initiated or when a client changes their password.

## **6. Restrict an operator's view of a client's holdings.**

We have introduced a new option that can be set on an operator that will restrict their view (when visiting a client record) to only show holdings where they have a direct operator relationship set on the holding.

## **7. Document upload notification**

You can now choose to get a notification when a client uploads a document to a company folder. A new setting at document folder level allows you to ensure that operators of any team the client belongs to will get a notification when the client uploads a document.

## **8. View child workflows from parent workflow**

We have made an enhancement to the 'View child workflow' button within the Activities section under Activities to allow you to easily monitor the progress of workflows that are running consecutively.

## **9. Other enhancements**

A number of other enhancements are included as part of this release:

- We have made a change to the AJ Bell feed to enable valuations to be picked up in their stock currency or pounds sterling. Previously all valuations were treated as pound sterling.
- We have added 2 new product types to enable you to record Trust Accounts and Portfolio (this enables a subdivision of funds within a parent plan to be created or for a general use to place directly held investments within a wrapper).
- Where performance data is included in a data feed, we have added the rolling quarter value to the performance summary.
- We have extended the ability to suppress of notifications to include both emails and push notifications.
- We have extended the moneyinfo API to enable you to add, amend or delete answers to a client's custom items (lists) within the fact find data.

## 2-way Integration with Intelliflo Office

### Introduction:

To reduce rekeying and save you time, we have added a new option that will enable certain client data to be synchronised your back office/CRM system..

A new action called "Merge Data" is available from the "Clients" page in moneyinfo manager.

Initially, we have implemented this with Intelliflo Office (IO) to allow 2-way synchronisation of client data including plans, assets and directly-held investments, plus dependants which are stored within the fact find.

To merge the data entered in moneyinfo you will need to ensure that you have set up a link to an existing Intelliflo Office client.

### Operator roles required:

To access this function you will need to have 'Manage Clients' role enabled.

### How to guide

Full details of how to edit the Intelliflo Office credentials and how to perform a client data merge are detailed in the how to guide below:



[How to guide 2-way Integration with Intelliflo Office.pdf](#)


### Improved client search.

Up to now you have only been able to search for clients using surname, postcode, and national insurance. We have now added the ability to search using your client's forename, login username, and login email address.

Simply enter all (or part) of the item you want to search for, and the list will be populated we any clients that meets the criteria for any of these fields.

All Companies / Ryan McCarthy Limited (12551) ▾

Search on ⓘ  ×

<input type="checkbox"/>	Name	Address
<input type="checkbox"/>	 Dion Barrett	73 Prior Walk, West Midlands, United Kingdom

**A new "Visit Clients" operator role**

We have made changes to allow you to grant limited access to an operator so they can perform actions on your client (associated with other roles) without being able to log into and view the clients portal account.

The "Access Client" role will now only permit an operator to use moneyinfo Manager and perform actions specific to their other roles granted. This role will allow an operator to view the client summary page to see an overview of the client.

We have introduced a new "Visit Client" role that is required to allow an operator to view a client's portal via auto-logins.

The existing "Manage Client" role now requires both "Access Client" and "Visit Client" to be granted before the enhanced role can be used by an operator.

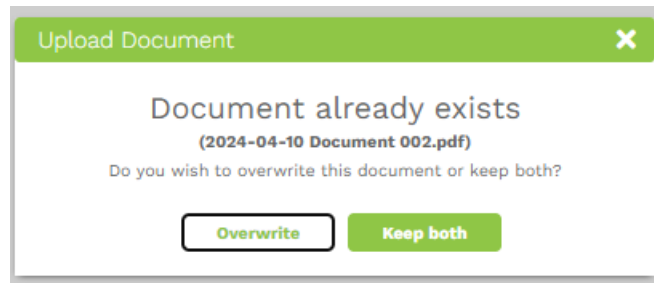
Below is a grid that illustrates how the 3 roles interact:

<b>Access Client Granted?</b>	<b>Visit Client Granted?</b>	<b>Manage Client Granted?</b>	<b>Can visit/manage?</b>
No	Yes	No	NO ACCESS
No	No	Yes	NO ACCESS
No	No	No	NO ACCESS
Yes	Yes	No	VISIT
Yes	No	No	NO ACCESS
Yes	Yes	Yes	VISIT & MANAGE
No	Yes	Yes	NO ACCESS
Yes	No	Yes	NO ACCESS

This role has been set for all relevant operators by default, so you don't have to change anything in your security groups or operator roles. You may wish to consider if you want to reduce access to the client portal for some operators using the new role.

## Handling documents with the same file name

If a document with the same file name as one that already exists in the folder is added to a moneyinfo folder by a client (or operator), a message will appear to warn the client / operator. They can choose to replace the old document or keep both of them.

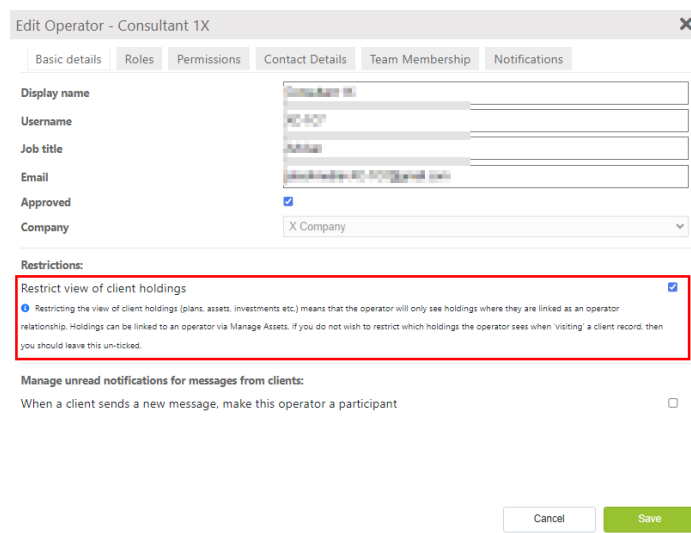


If they decide to keep both new and existing documents, then the new one will be added with an incremental numbering so that these can be distinguished.

## Restrict the operator's view of a client's holdings.

We have now made it possible to limit what an operator can see when they log in to a client's portal account using the visit or manage action, using the new "Restrict view of client holdings" setting. If you do not wish to restrict which holdings the operator sees when 'visiting' a client record, then you should leave this unticked.

This option is accessible from Operators > Action – Edit Operators

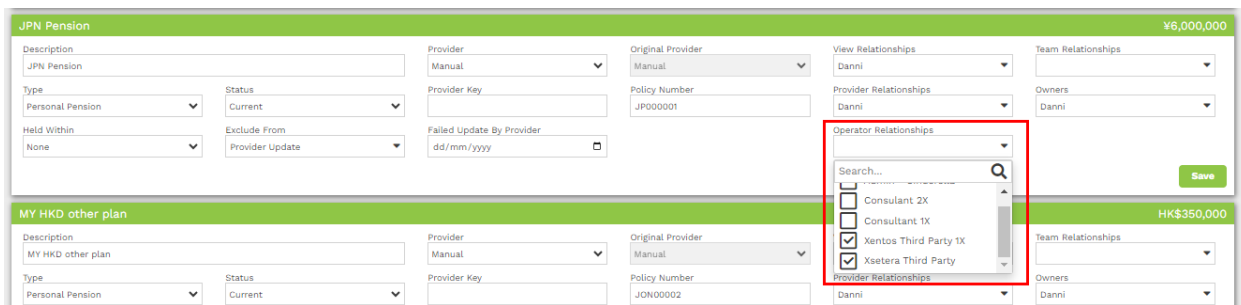




Within Manage Assets, an operator can now be linked to a specific holding. When 'Restrict view of client holdings' has been ticked, the operator will only see holdings where they have an "Operator relationship" (formerly known as Consultant relationship). Currently, this feature is only available to operators with the consultant role.

In addition, we've introduced a new "Team Relationship" setting. If this is ticked, operators with the "Restrict view of client holdings" option ticked will be able to see any holdings as long as they're part of the team. This allows you to restrict access for all operators in a team without individually setting up operator relationships. This is a way to control access for operators who don't have the Consultant role.

It's important to note that if a client is in two teams and one of the teams has been set as a team relationship, on a holding, then operators in that team will be able to see the holdings.



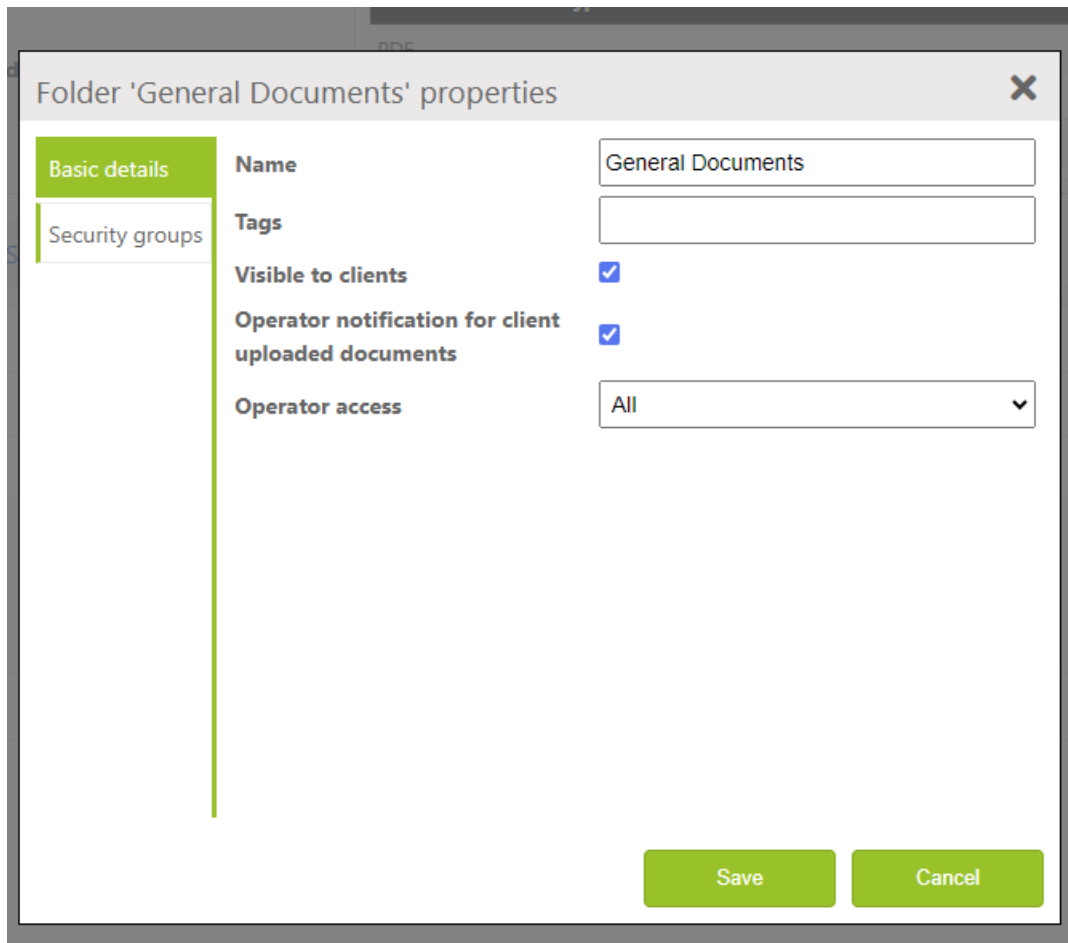
The screenshot displays two asset management forms. The top form is for 'JPN Pension' (value: ¥6,000,000) and the bottom form is for 'MY HKD other plan' (value: HK\$350,000). Both forms have fields for Description, Type, Status, Provider, Original Provider, Policy Number, and Failed Update By Provider. A red box highlights the 'Operator Relationships' dropdown menu, which is open and shows a search bar and a list of roles: Consultant 2X, Consultant 1X, Xentos Third Party 1X, and Xsetera Third Party. The 'Provider Relationships' dropdown is also visible, showing 'Danni'.

The exclude from checkboxes are now also in their own dropdown labelled 'Exclude From'.

## Document upload notification

There is a new option to receive a notification when a client uploads a document to a company folder. You can access this option in Company actions>Edit company> Documents tab under Actions: Edit. If you select 'Operator notification for client uploaded documents', operators of any team the client is part of will receive a notification when the client uploads a document to that folder.

This setting is only currently available for 'Default folder hierarchy for client' folders. When this is set at folder level, and a client uploads a document to that specific folder, the operator will get a notification in moneyinfo manager. The notification will tell them that a document has been uploaded. When they click on the notification, it will take them to the clients activity timeline where they can see the document entry with the date and time of the upload..



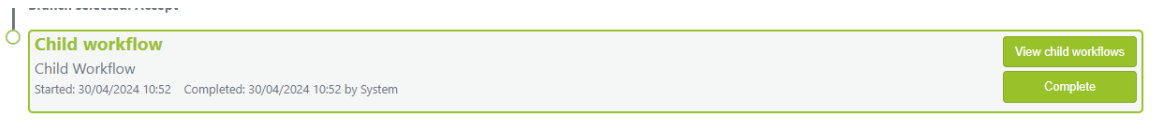
Folder 'General Documents' properties

Basic details	Name	General Documents
Security groups	Tags	
	Visible to clients	<input checked="" type="checkbox"/>
	Operator notification for client uploaded documents	<input checked="" type="checkbox"/>
	Operator access	All

Save Cancel

## View child workflows from parent workflow

We have made an enhancement to the 'View child workflows' button within the Activities section under Activities>Activities. Now, when users are viewing a workflow, clicking the 'View child workflows' button will direct them to the Activities page, with a filter applied to display any child workflows associated with the parent workflow.



If a workflow contains multiple child workflows, you can select and view them by clicking 'View', giving you quick access to detailed information such as steps and statuses.

Workflow	Step	Status	Started On	Started By	Last Activity	Waiting On	
Book A Meeting Participants: Gerry Keay, Adrian Langdon	Upload meeting feedback	In progress	30/04/2024 17:08	Scheduler	30/04/2024 17:27	Company	<a href="#">View</a>
Book A Meeting Participants: Gerry Keay, Perry White	Wait	In progress	30/04/2024 17:08	Scheduler	30/04/2024 17:23	Scheduler	<a href="#">View</a>
Book A Meeting Participants: Gerry Keay, Florence Conner	Your meeting notes	In progress	30/04/2024 17:08	Scheduler	30/04/2024 17:15	Client	<a href="#">View</a>
Book A Meeting Participants: Gerry Keay, Ryan McCarthy	Book a meeting	In progress	30/04/2024 17:08	Scheduler	30/04/2024 17:08	Client	<a href="#">View</a>
Book A Meeting Participants: Gerry Keay, Mary Beales	Book a meeting	In progress	30/04/2024 17:08	Scheduler	30/04/2024 17:08	Client	<a href="#">View</a>

Showing all results (5)

This allows you to easily monitor the progress of workflows that are running consecutively.

## Support

If you have any comments or queries regarding any of the new features or changes detailed within this release note, please email, [support@moneyinfo.com](mailto:support@moneyinfo.com) or call Support on 03303 600300