



CEO Update

Yodlee 1.1 Upgrade Completion

The upgrade to Yodlee 1.1 will be officially complete on 30th September! We know it's been a long road (believe us, we really do know) but the end is now in sight.

As of 1st October, 2021 any clients who have not yet completed the upgrade will no longer receive automatic data updates – the upgrade MUST be completed in order for automatic data updates to continue beyond this date.

As mentioned in our previous eNews and in several Service Notifications, there will be a window of 30 days after the completion date which, if the upgrade is completed during this time, will guarantee no gaps in financial account data.

In summary, all clients must be upgraded by 30th October, 2021 to ensure no financial account data gaps. There definitely will not be any further extensions!

On that note, we encourage you to advise all your clients to complete the upgrade as soon as possible. Our support team is here to help Monday - Friday 9:00 am to 5:00 pm AEST.

For any who missed the previous notifications or messaging, a video explainer is available [here](#).

Jon Shaw



Wife and Husband - Same Bank - Different Credentials – SOLVED!

1. Solution Released 3rd September, 2021

It took us a little longer than anticipated to get it right as we wanted to make sure the release was solid and of the highest quality. Any Moneysoft client account can now associate one Household Member - free of charge. And the good news is, that's not a limit. If you would like to allow your clients to be able to add multiple Household Members to an account, we can do that for a relatively low cost. Just ask our support team about it.

For any of you who missed the latest Release Notification, you can find out more about the Household Member feature [right here](#).

2. Details

It's important that our business customers remember that in order for users to link financial accounts, they must have both a Moneysoft client account AND a Yodlee user account.

When we create a Moneysoft client account, we automatically create (and manage) a corresponding Yodlee user account within the system. This is invisible to you and your clients, of course. When two (or more) people share a single Moneysoft login, they are also sharing a single Yodlee user account – and this is at the root of the problem we've solved.

A Household Member is associated to the primary client's Moneysoft account, but they have their own login to Moneysoft, and their own Yodlee user account, meaning that they can link their financial accounts and have them show up as part of the "household" finances. It works a treat!

Webinars - Midwinter AdviseOS Integration

Midwinter's AdviseOS now seamlessly integrates with Moneysoft's Fact Find solution to eliminate double data handling. Watch the recap here to learn how the integration allows users to seamlessly push and pull data between the two systems, while selecting which system to use as the source of truth for each piece of data.

The webinar provides an overview of:

1. How this integration helps save time and maintain control of your client data.
2. Moneysoft's Fact Find solution.
3. Midwinter's AdviseOS financial advice software.

For full details on getting started visit our complete set up and integration guide <https://www.moneysoft.com.au/integrations-2/midwinter-integration/> or speak to your account manager.

Other Updates, Support, Hints and Tips

1. Account Status and Errors just got a whole lot more helpful

We have introduced a set of new icons and colour scheme to help you and your clients easily see the status of linked financial accounts.

Accounts that are not in error and have recently refreshed will display a green tick.

Accounts that are not in error but have not refreshed within the last seven days, will also have a green tick mark but will have an orange Click here with instructions on what to do get the account refreshing again.

Accounts that have an error that can be resolved by the client taking some form of action, such as re-entering their internet banking log in credentials or accepting updated terms and conditions at the bank, etc. will see an orange alert icon along with the message, Action Required Click here.

Financial accounts that are in error that require Support to assist with will display a red Stop sign icon with the message, Error, Click here.

This new design will provide more clarity on the status of financial accounts along with improved messaging to assist in dealing with account errors.

2. Closed Accounts can now be hidden from view

If you're wondering where the Closed accounts went, they've been hidden!

To keep to Accounts page nice and tidy we have created a new feature - Hide Closed Accounts.

The accounts will automatically be hidden as the default setting. To view closed accounts, click on the three dot options menu at the top of the Linked Accounts module and select Show Closed Accounts.

To hide the closed accounts again, click on the three dot options menu at the top of the Linked Accounts module and select Hide Closed Accounts.

