

## eNEWS MONTHLY

### YOUR COMPLETE WEALTH AND CASH FLOW PORTAL



It will be a short eNews Monthly update this month as we've been concentrating on those big-ticket items I mentioned in last month's newsletter. However, we want to keep you all up to date on how things are progressing, so here's the latest Snapshot.

### New Pricing and Product Re-bundling

We're tracking well for the end July / early August launch of our new pricing and product bundles. Notwithstanding the possibility that we may find a few bugs or issues that we're unhappy with, we should be launching either on, or close to the original target date. We can now give you a sneak peek of what you will see when this happens.

1. The standard Commercial, Wholesale and Enterprise subscription packages with various minimum monthly fee commitments and product price points will still be available. The subscription packages themselves have been simplified to start at \$200/mth, \$1,000/mth and \$5,000/mth respectively. And we will still let you use up the minimum subscription fee across all product types and users before we charge you one cent more.

2. We will still have Pro and Lite products, but they will be renamed to "Cash Flow Pro" and "Wealth Track" – the idea being to make the usage of each product a bit more obvious from the name! In addition, we'll have two new products: Basic Fact Find and Auto Fact Find. Sneak peek: Basic Fact Find will start at just \$1/month!
3. You will be able to "mix and match" clients to product types. As you progress clients up the product chain, each higher tier product will include ALL functionality from the product tier(s) below. In other words, Wealth Track will include new features plus everything from Auto Fact Find and Cash Flow Pro will include...absolutely everything! What you use and pay for will be more flexible and more easily matched to every single one of your clients.

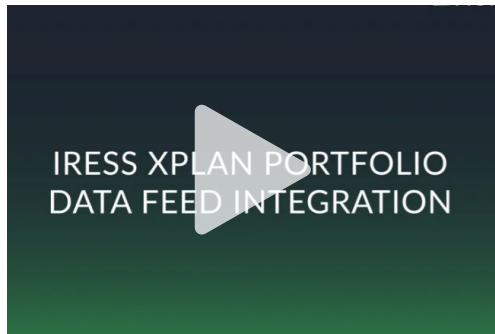
4. Pricing for Wealth Track (formerly Lite) product will rise slightly to take account of new functionality included – the price for Wealth Track is \$10/month (instead of \$8/month for Lite) but we think you'll all find this well worth the extra two dollars.

**NOTE:** Any customers currently on regular subscriptions for Pro and/or Lite will remain on the same deal and pricing until the end of this year. Following that point, we will auto-upgrade all accounts to the new pricing and subscription model. Of course, we will be in touch with you all well before then.

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XPLAN Integrations and digitising your Fact Find



How to integrate XPLAN IPS - summary video

As you would all be aware by now, the [XPLAN IPS integration](#) has been live for some time – iress had to iron out a glitch with the integration in early July, but that has now been resolved and it's all systems go. If you haven't tried it out, get in touch with Miles, Steve or Victoria so they can help you get set up...or just check out the excellent [video here](#).

Along with the configurable digital fact find, the two-way XPLAN CRM integration is coming as well. We're just in the final stages of testing this to make sure everything works as expected before launch.

As we mentioned in last months' update, every customer with an active subscription will have automatic access to the fully customisable and configurable Fact Find,



What is Moneysoft - explainer video for clients

with automatic financial account data feeds and XPLAN integrations all included. And don't forget eSignatures, which will mean a completely automated, compliant and self-service digital Fact Find capability for everyone. This is going to be a game-changer!

**Yodlee upgrade**

Further to our last update, the Yodlee upgrade is now live in our SuperCents app and our PFM Software in the USA. As we bed down the upgrade, we are working towards providing our Australian customer base (by far the largest) with the most seamless upgrade experience possible – this is turning out to be the hard part, but we believe well worth the wait.

To achieve this ambition, we're building an "upgrade wizard" that will guide your clients through a sequence of steps, making the upgrade simple and straightforward. The wizard will prompt clients to re-link each of their financial institutions and then automatically merge all account data so that no transaction or balance history is lost. When the wizard is completed, your client's Moneysoft account will look just as it did before.

Ensuring that there will be no loss of data during this process is an area in which we're taking extra care however, as the ultimate contingency, all "old" data will be kept indefinitely, so if we do encounter some unanticipated scenarios, we will be able to recover client's data no matter what. We've already developed most of the code to achieve this...we now just need to put a user interface over the top and test it thoroughly before releasing it for use.

When we do go live, you will be able to have a mix of clients operating under old and new environments – so you don't need to stress about getting all of your clients to upgrade at once, you can do it over the course of a month or

two. But note: all clients will need to be upgraded by the end of December 2020.

When complete, this upgrade will mean that clients only need to enter their internet banking details once to retrieve (or update credentials for) all accounts from an institution, e.g. entering Commonwealth Bank credentials once will retrieve (or update) all Bank, Credit Card, Loan and other accounts the client has with Commonwealth Bank.

There is nothing you need to do right now, however, when the upgrade is released we will be in touch with you to help you and your clients through the process, which will simply involve logging in and following the upgrade prompts to ensure data continues to flow uninterrupted.

A [short FAQ](#) has been developed, but if you have any other questions please don't hesitate to contact our [support team](#).

We appreciate your patience and support, and we're really excited to bring you these fantastic product additions, integrations and upgrades... very soon!