

# New Features - February 2019 Release (21/02/2019)

## New Features

BGL continues its strong tradition of building Customer focused products. Today's release sees the completion of a new three-part customer service project incorporating Zendesk .

Zendesk is a leading cloud-based customer service software used by 200k+ organisations worldwide improving customer engagement and providing you with new services around support tickets.

## The three improvements encompass

### 1 New Log a Support Call Function with AI

Our new integrated support system will help us better service your support tickets, giving you the ability to:

- Quickly and easily log a ticket directly through Simple Fund 360.
- Attach any supporting documents and files that will help with resolving your support ticket.
- Search our Help Resources for related articles.

Plus, once your ticket is logged, Zendesk's Answer Bot will use artificial intelligence to suggest relevant and helpful articles based on your specific query.

### 2 New SF360 Knowledge Centre - Client Portal

Using your Simple Fund 360 login credentials you will be able to Track the **activity** , progress and status of your tickets including

- Search past tickets, update, close and reopen tickets
- Monitor your assigned BGL Support agent
- Full email history of support calls will be available
- Comment on help articles, provide feedback and follow power users.

### 3 New SF 360 Knowledge Centre

We have a new online help centre (powered by Zendesk) providing you with a wealth of information including help articles, training manuals and integration with the BGL Community.

## Improvements

1. Security enhancement for user accounts has been implemented. Users must use strong passwords, BGL will prompt users on passwords that are considered to be unsafe. (compromised in a known data breach.)
2. Simple Fund 360 allows you to easily add your own letters and minutes. You can use a set of downloadable mail merge fields which can be quickly extracted and added to your own letters and reports The follow report variables have been now added.
  - BSB of the bank which has been used in the tax return.
  - Bank account number which has been used in the tax return.
  - Bank account name which has been used in the tax return.
  - Name of the Badge linked to the fund.
  - Segregation method used in the tax return
  - Validation status for tax return
  - Actuary obtained status
  - Member account description variable can now be added to pension minutes and letters
  - Taxable proportion for member mail merge field
  - Total pensions paid for the member variable

For further information on Custom Reports in Simple Fund 360 [Click Here](#) <sup>1</sup>

1. Member beneficiary details will now be copied from accumulation to the new pension being started.
2. For transactions imported via XML, User/System rules will now be applied to accounts 23800,23900, and 25000.
3. SMSF Audit Report Settings - The Auditors Opinion will default to \*\* Non-Qualified.\*\* Auditors will be listed in alphabetical order.
4. Corporate Actions List - Improvements have been made to sort transactions based on the order to action date in ascending order by default.
5. When entering members opening balance transactions, Simple Fund 360 will enter the transaction date based on the system start date and the financial year end date. Users will still be able to edit the date entered.

## Errors Corrected

- For suggested matched transactions, the corresponding GST entry was not created.
- Pension dashboard was previously incorrect for TRIS. (Retirement Phase)
- Migrated Fund - Lump Sum Payments on Trial Balance don't match with Detailed Trial Balance
- Fund Balance API returns incorrect reserve balances

- Error generating Investment Income Comparison Report
- Rollover Benefit Statement - not populating other given names
- Format Error - Excel download of the Projected Pension Calculation' Report.
- TBAR Validation - Add validation check to contact numbers.
- Corrections made to Capital Gains Reconciliation Report for a fund formed In the middle of the year.
- Detailed trial balance issue with the 50010 member components.
- New Corporate Action - security search bar display.