

# AdviceOS Release 1 (Feb 2026)

We wish to inform you of recent updates to AdviceOS, and the Dynamic Fact Find as part of our current release. For your convenience, these changes have been organised according to the relevant areas of the software and categorised based on whether they introduce new functionality or address issues raised by users or staff. Please refer to the table of contents below for a summary of the updates:

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# AdviceOS

In preparation for our release scheduled for the evening of 2 Feb 2026, please review the following items outlining changes that will impact various modules within AdviceOS. The specific module/s impacted are listed within each item.

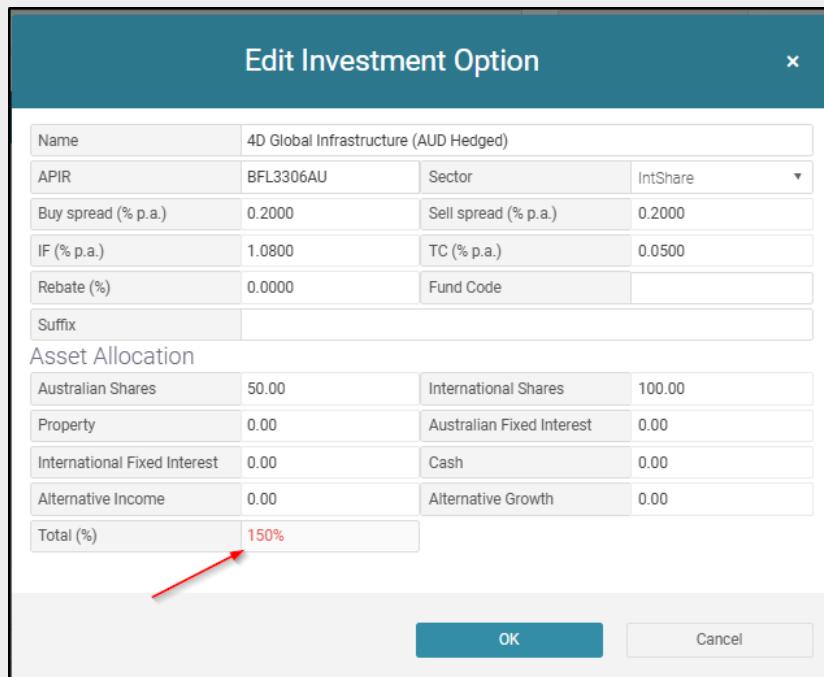
## Enhancements

### Fundsbase Now Shows Total Asset Allocation for Easier Validation

**Module:** Fundsbase

**Reference:** 92226

**Details:** When editing options in Fundsbase, it will now show a Total percentage for the Asset Allocations to assist in validation.



The screenshot shows the 'Edit Investment Option' dialog box. The 'Asset Allocation' section contains the following data:

	Australian Shares	International Shares	
Buy spread (% p.a.)	0.2000	Sell spread (% p.a.)	0.2000
IF (% p.a.)	1.0800	TC (% p.a.)	0.0500
Rebate (%)	0.0000	Fund Code	
Suffix			

Below the table, the 'Total (%)' field is highlighted with a red arrow and contains the value '150%'.

**Configurations required:** N/A

**Actions:** N/A

## Adjustments to Drag and Drop Functionality

**Module:** Planbuilder

**Reference:** 92281

**Details:** Information text has been added in the Edit Wordings dialog for Planbuilder> Recommendations> Chosen Recommendations to explain the drag and drop functionality. This helps AOS users understand that the order of the items determines how they appear in the advice document.

Additionally, the up/ down arrows for re- ordering the Benefits, Disadvantages & Outcomes of a Recommendation have been updated to better align with the existing Midwinter UI style.

**Configurations required:** N/A

**Actions:** N/A

## Added 'Expiring' Registration Status for Mobile Numbers to the API

**Module:** User Configuration

**Reference:** 83512

**Details:** A new registration status, '**Expiring**', has been added to the API for registered mobile numbers. This enables the AOS users whose registered mobile numbers are about to expire within the next month to complete the re verification process via the **User Management> User Configuration> Register for Text Messaging**. The re- verification process is completed by using the '**Request**' button on this page to generate the two-factor authentication code, which will be sent to the mobile number for validation. Input this code into the available field on the page and '**Confirm**', your mobile number will be registered for the next 12 months.

New warning messages have been added on the Client> Fact Find> Notifications page, which will appear when the registered number of the users is nearing expiry to prompt them to do the re-verification.

For help or inquiries, please email our support team at [info@midwinter.com.au](mailto:info@midwinter.com.au)

**Configurations required:** N/A

**Actions:** N/A

## Issues resolved

### Unable to Save Recommendations in PlanBuilder

**Module:** Planbuilder

**Reference:** 92413

**Details:** AOS users encountered application errors when saving changes to Chosen Recommendations in Planbuilder module. This issue has now been resolved.

**Configurations required:** N/A

**Actions:** N/A

# Dynamic Fact Find

As part of the scheduled release on the evening of 4 Feb 2026, please review the following items outlining changes that will impact the Dynamic Fact Find module.

## Enhancements

### Introducing Dynamic Fact Find Reporting- Status Data Report

**Module:** Other

**Reference:** 89536

**Details:** A new report has been created for Dynamic Fact Find. This report captures information on the historical state of each fact find and a timeline of these changes.

It includes the current state, the date the fact find progressed to each specific state, and information on client and adviser access.

The date range selected will report on all fact finds created within that time period.

It can be run at the Licensee or individual Adviser level.

**Generate Report**

Report type	Report scope
<input type="button" value="Basic Data"/> <input type="button" value="More Data"/> <input type="button" value="Aggregate Data"/> <input style="outline: 2px solid orange; border: 1px solid orange;" type="button" value="Status Data"/> <input type="button" value="Usage Data"/>	<input type="button" value="Licensee"/>  <input type="button" value="End date: dd/mm/yyyy"/>
<input type="button" value="Download"/>	

**Configurations Required:** N/A

**Actions:** To access Dynamic Fact Find Reporting, please contact our Support team to have the required permission enabled.

## Introducing Dynamic Fact Find Reporting- Aggregate Usage Report at Licensee/ Adviser Level

**Module:** Other

**Reference:** 89537

**Details:** A new report has been created for Dynamic Fact Find. This report captures aggregate information on all fact finds.

The start and end dates used will select all fact finds that were created within that date range. Additionally, each fact find will only appear with one state, so any published fact find would have previously been submitted by the client.

It can be run at the Licensee or individual Adviser level.

**Generate Report**

Report type	Report scope
<input type="button" value="Initial Data"/> <input type="button" value="Access Data"/> <input style="outline: 2px solid orange; background-color: #ffffcc; border: 1px solid orange; color: orange; font-weight: bold; font-size: 10pt; font-family: inherit; padding: 2px; margin: 2px 0;" type="button" value="Aggregate Data"/> <input type="button" value="Status Data"/> <input type="button" value="Usage Data"/>	<input style="outline: 1px solid #ccc; border: 1px solid #ccc; padding: 2px; margin: 2px 0;" type="button" value="Licensee"/>  <input style="outline: 1px solid #ccc; border: 1px solid #ccc; padding: 2px; margin: 2px 0;" type="button" value="End date: dd/mm/yyyy"/>
<input style="background-color: #009640; color: white; font-weight: bold; font-size: 10pt; font-family: inherit; padding: 5px; width: 100%; text-align: center; border: none;" type="button" value="Download"/>	

**Configurations Required:** N/A

**Actions:** To access Dynamic Fact Find Reporting, please contact our Support team to have the required permission enabled.

## Introducing Dynamic Fact Find Reporting- Usage Report at Licensee/ Adviser Level

**Module:** Other

**Reference:** 91616

**Details:** A new report has been created for Dynamic Fact Find. This report captures detailed information on each individual fact find.

It includes information such as historical states, browser & devices used, last field update, client, and adviser access information.

The date range selected will report on all fact finds issued within that time period.

**Generate Report**

Report type	Report scope
<input type="button" value="Edit Data"/> <input type="button" value="Usage Data"/> <input type="button" value="Aggregate Data"/> <input type="button" value="Status Data"/> <input style="outline: 2px solid orange; border: 1px solid orange;" type="button" value="Usage Data"/>	Licensee <input type="button" value="▼"/> End date: <input type="text" value="dd/mm/yyyy"/> <input type="button" value=""/>
<input type="button" value="Download"/>	

**Configurations Required:** N/A

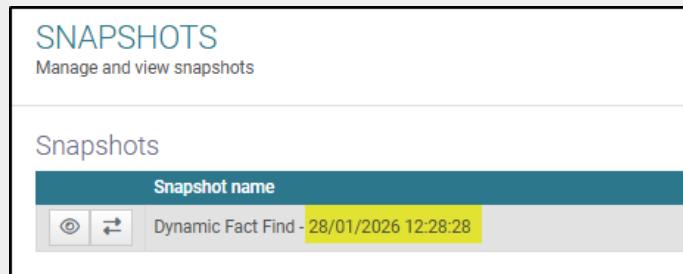
**Actions:** To access Dynamic Fact Find Reporting, please contact our Support team to have the required permission enabled.

## Date & Time Stamp Added to Dynamic Fact Find Snapshot Name

**Module:** Other

**Reference:** 91371

**Details:** The Dynamic Fact Find snapshot naming has been enhanced to automatically include a date and time stamp.



This update makes it easier for users to identify, differentiate and track snapshots by clearly indicating when each snapshot was created, improving usability and reducing confusion when multiple snapshots exist.

**Configurations Required:** N/A

**Actions:** N/A

## Issues resolved

### DFF Publish Populating Dummy Residential Address

**Module:** Other

**Reference:** 91795

**Details:** An issue was resolved where Dynamic Fact Find was sending dummy residential address to AOS, when no address was provided in DFF.

Additionally, a bug has been fixed where numeric fields without values triggered a 'value is not a number' error.

**Configurations Required:** N/A

**Actions:** N/A