

# 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

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

**Module:** Fundbase

**Reference:** 92226

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

The screenshot shows the 'Edit Investment Option' dialog box. It contains a table for 'Asset Allocation' with the following data:

Asset Allocation			
Australian Shares	50.00	International Shares	100.00
Property	0.00	Australian Fixed Interest	0.00
International Fixed Interest	0.00	Cash	0.00
Alternative Income	0.00	Alternative Growth	0.00
Total (%)	150%		

A red arrow points to the 'Total (%)' field, which displays '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

Adviser Data

Adviser Data

Adviser Data

Aggregate Data

Status Data

Usage Data

Licensee

End date:

dd/mm/yyyy

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.

The screenshot shows a 'Generate Report' form. It has two main sections: 'Report type' and 'Report scope'. Under 'Report type', there is a dropdown menu with options: 'Public Data', 'Access Data', 'Aggregate Data' (highlighted with an orange border), 'Status Data', and 'Usage Data'. Below this menu is a teal 'Download' button. Under 'Report scope', there is a dropdown menu set to 'Licensee'. To the right of this is an 'End date:' field with a date picker icon and the format 'dd/mm/yyyy'.

**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/ Advsier 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

Initial Data

Initial Data

Access Data

Aggregate Data

Status Data

Usage Data

Download

Report scope

Licensee

End date:

dd/mm/yyyy

**Configurations Required:** N/A

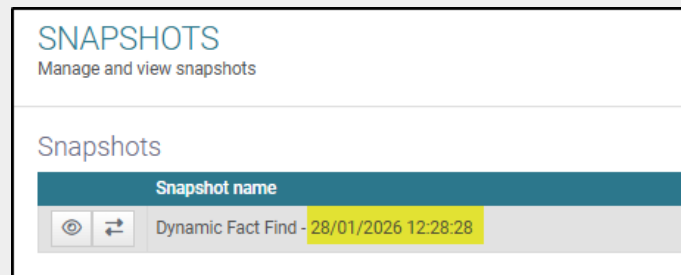
**Actions:** To access Dynamic Fact Find Reporting, please contact our Support team to have the required permission enabled.

### 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