

AdviceOS Release 1 (Mar 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 Mar 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

SMSF ROA Template	
Module: Templates	Reference: 83941
Details: Midwinter have implemented an SMSF RoA template which can be generated via Planbuilder. Refer to the additional guide titled SMSF ROA Template Guide available on our Help centre for further instructions on how to generate the report via Planbuilder.	
Configurations required: N/A	
Actions: N/A	

Ability to Set Days for Notification Prior to Appointment Date	
Module: Fact find	Reference: 79007
Details: Provided users the ability to select from a range of dates when appointment reminder messages are sent to their clients via SMS.	
Configurations required: N/A	
Actions: N/A	

Issues resolved

Multiple Widget Filters Not Operational	
Module: CRM	Reference: 93247
Details: Resolved an issue, where multiple widget filters on the dashboard were not operational. AOS users can now use the filters across all the widgets with results updating correctly based on the selected criteria.	
Configurations required: N/A	
Actions: N/A	

Omnium Mapping issue- Childcare Super	
Module: Fact Find	Reference: 92898
Details: AOS users were previously unable to map insurances from the Fact Find to Omnium for Childcare Super platform. This issue has now been fixed.	
Configurations required: N/A	
Actions: N/A	

Omnium Mapping issue- AIA Tailored Protection	
Module: Fact Find	Reference: 93078
Details: AOS users were unable to map insurances from the Fact Find to Omnium for the AIA Tailored Protection platform. The mapping functionality has now been restored	
Configurations required: N/A	
Actions: N/A	

Dynamic Fact Find

This sprint includes internal updates and improvements that do not impact end- user functionality. No user- facing changes have been introduced as part of this release.