AdviceOS Release 3 (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:

Summary of Changes

AdviceOS

In preparation for our release scheduled for the evening of 30 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

Reporting - Tag	
Module: Reporting	**Reference:** 93817
Details: Added AdviserName column to the Reporting -> Custom Field -> Tag report.	
Configurations required: N/A	
Actions: N/A	

Issues resolved

Reporting Error - Tag Report	
Module: Reporting	**Reference:** 93814
Details: Fixed issue with Reporting > Custom Fields > Tags screen not using the Report filters and instead returning all clients the running user has access to.	
Configurations required: N/A	
Actions: N/A	

Transitions- Contributions Not Showing On Implementation Page

Module: Modelling	**Reference:** 93946

Details: Concessional contributions specified in the optimisation dialog are now correctly included in Implementation data across both the user interface and reporting.

Configurations required: N/A

Actions: N/A

Adviser SMS Error

Module: CRM	**Reference:** 94044

Details: Some AdviceOS users experienced an issue where SMS messages could not be sent. This was caused by a routing change from MessageMedia that affected the integration. A hotfix was deployed on 25 March 2026 to resolve the problem and restore SMS functionality.

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.