finPOWER Connect

Version 4.1, 6.0 and 6.1 Strategic Plan

Version 1.00
1 November 2023

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Disclaimer

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Until we begin work, and indeed until we complete work on a version, it is hard to determine exactly what issues we will encounter. In addition, technology and government legislation can change quickly - so we reserve the right to amend this plan in the future.

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Version History

Date	Version	Name	Changes
01/11/2023	1.00	JR	Created

Introduction

To help our finPOWER Connect Users plan for the future we have developed an outline of what the next few major finPOWER Connect versions will look like.

We have reviewed several options for the future of finPOWER Connect and decided on a cautious approach that should provide benefits in both the short and long term.

Rather than release a version that includes many major functionality changes as well as major technological changes we have opted for a phased approach.

The benefits provide a less risky path for both finPOWER Connect Users and Intersoft, whilst providing some important changes along the way, especially in the short term.

- Version 4.1
  - Some database and functionality changes.
  - This will break compatibility with version 3.4 and 4.0 database versions.
  - Whilst some database changes provide a pathway to additional functionality, these may be delayed until 6.0 and 6.1.
- Version 6.0
  - Technology changes – move to .NET 8 (from .NET Framework 4.8).
  - This will keep compatibility with version 4.1 databases.
- Version 6.1
  - More database and functionality changes.
  - This will break compatibility with version 6.0 databases.

Whilst this document outlines expected changes in various versions, it may be some items are pushed to a later version and vice versa.

NOTE: The next top-level version of finPOWER Connect is Version 6 and NOT Version 5.

This is because our old finPOWER Product is colloquially known as "finPOWER 5" – and it may confuse some users if we used this version.

Note, the final version of finPOWER was released on 3 March 2015 and is version 5.07.49.

The main focus of finPOWER Connect 4.x was and remains finPOWER Connect Cloud. Development of finPOWER Connect 4.x will continue until finPOWER Connect 6 starts its major development phase. However, we will keep the option of providing new 4.1 releases after 6.0 is released as necessary.

finPOWER Connect 6 will focus on shifting technologies to the **.NET** Platform.

NOTE: Once a new version is released it is unlikely older versions of finPOWER Connect will be further developed - except in the case of a major issue that cannot otherwise be resolved.

The following is the current expected timeline:

- Version 4.0 - Released in December 2022.
- Version 4.1 – Q1 to Q2 2024.
- Version 6.0 – Q4 2024 to Q1 2025.
- Version 6.1 – To be decided.

What does this mean for you?

Technology is changing and finPOWER Connect needs to keep up with changes.

- If you are on a version prior to version 4.0 we strongly suggest you plan, with your Intersoft Dealer, to move to version 4.0 as soon as practical.
- Treat finPOWER Connect version 4.0, 4.1, 6.0 and 6.1 as major upgrades.
- You should start reviewing how you use finPOWER Connect and prepare.
  - There are utilities to help identify areas to review.
  - Stop using obsoleted functionality and old technologies as soon as possible.
  - Stop creating new scripts and other functionality that use obsoleted or old technologies.
  - Review and update existing scripts and other functionality.
- We need to get feedback on what the likely issues are if we, for example, drop an old interface like the General Ledger interface.
  - Please talk to your Intersoft Dealer if you have any concerns.
- The Cloud/ Web.
  - As we all shift to the Cloud, certain functionality in finPOWER Connect simply cannot be moved across to the Cloud.
    - For example, Page Sets cannot be used in finPOWER Connect Cloud, so Page Sets should be avoided; use HTML Widgets instead.
  - For now, there are no plans to make finPOWER Connect solely cloud based.
    - BUT we want to get to a place where everything can be run in the Cloud.
- So long as you are pro-active in the period 2023 to 2025 you should be able to smoothly upgrade when versions are released.
  - Run the Support Information Report (under Help, Support menu).
    - Review the "Future Compatibility Information" section for functionality that may need attention.
  - Run the Script Compilation Errors Report (under Tools, Utilities menu).
    - This Report shows obsoleted functions and properties that may be removed in the future.
  - Avoid using obsoleted or old functionality in future projects.
  - If obsoleted functionality is in use, a plan should be made to stop using that functionality.
- Of course, you do not need to immediately move to new versions.
  - There is a reasonable timeframe of at least 2 years to prepare and time after that to transition.
  - But older versions of finPOWER Connect are unlikely to be further developed, so legislative changes, for example, may only be included in later versions of finPOWER Connect.

If you have any queries, feedback, or concerns, please talk to your Intersoft Dealer.

Database Version Compatibility

Our approach with finPOWER Connect is to try to maintain compatibility of the finPOWER Connect database, so that you can easily switch between versions.

However, versions 4.1 and 6.1 will introduce database changes and therefore break compatibility.

- finPOWER Connect version 4.0.x continues to use the same database structure as finPOWER Connect version 3.4.x.
  - This means versions 3.4.x and 4.0.x can open and access the same database.
  - Indeed, the two versions could be run at the same time on the same computer accessing the same database.
  - **This means you can install version 4.0.x and test it works without having to upgrade your database and lose compatibility with your current processes**.
  - Of course, this should firstly be done in a test environment before moving to production.
    - In your test environment, you can run both 3.4.x and 4.0.x and test side by side.
- finPOWER Connect version 4.1.x will break database compatibility with previous versions.
- finPOWER Connect version 6.0.x will use the same database structure as finPOWER Connect version 4.1.x.
  - This means versions 4.1.x and 6.0.x can open and access the same database.
  - Indeed, the two versions could be run at the same time on the same computer accessing the same database.
  - **This means you can install version 6.0.x and test it works without having to upgrade your database and lose compatibility with your current processes**.
  - Of course, this should firstly be done in a test environment before moving to production.
  - In your test environment, you can run both 4.1.x and 6.0.x and test side by side.
- finPOWER Connect version 6.1.x will break database compatibility with previous versions.

WARNING: This does NOT mean functionality is backwards compatible.

For example, if you started using a new feature in version 4.1 and then reverted to version 4.0, the version 4.1 feature may cause version 4.0 to not work properly.

Consider if we added a new Element Type in version 4.1. Version 4.0 would not handle that correctly and cause unpredictable issues.

We will be careful with this type of issue, BUT it is unlikely newer versions will be strictly compatible with older versions.

This is the same now - if running multiple versions of the same major/ minor version of finPOWER Connect.

Web vs Windows Forms based User Interface

We have no plans to make finPOWER Connect solely cloud based in the near future.

- This means the technology environment will remain largely the same as it is currently.
  - You will still host your own Database, Application and Web Server.
  - Albeit you may use a hosting platform such as Microsoft Azure or Amazon Web Services (AWS).
- What we want to get to is a point where everything can be run in the cloud.
  - This means the finPOWER Connect Cloud User Interface has equivalent, but potentially different, functionality to the Windows Forms User Interface.
- However, certain functionality in finPOWER Connect simply cannot be moved across to the Cloud.
- Multi-Tenanted Cloud-based Application
  - We do not think a multi-tenanted cloud-based application, like MYOB or Xero, will work for most Finance Companies.
  - We would lose much of our customisation functionality, e.g., scripting, because it would be very difficult to allow this in such an environment, i.e., where one customer could literally bring down everyone else.

Functionality NOT supported in finPOWER Connect Cloud

Here is a summary of items that are not supported in finPOWER Connect Cloud.

Note, even if you believe you have no interest in finPOWER Connect Cloud now – we expect most Users will indeed move to the Cloud in the next few years. Therefore, prevent costly headaches in the future by avoiding the following now.

- Account Applications.
  - Data Capture method of "Page Set" not supported by finPOWER Connect Cloud.
- Action Script Types.
- Limited support for Summary Text Script Types.
- Documents.
  - Word "VBA" and Excel "VBA" File Types.
- Email.
  - Does not support Save as Draft or Open for Edit.
- Filter Script Types.
- Page Sets.
- Summary Page (version 1) Scripts.
- Wizard Validator Scripts.
- Workflow Types (version 1).

For more information see the topic "Outdated Functionality".

.NET Framework v .NET

finPOWER Connect is built using Microsoft's **.NET Framework**. In particular, finPOWER Connect uses Windows Forms functionality to build the User Interface.

Microsoft .NET Framework

- In 2019 Microsoft announced that version 4.8 was the last release of the **.NET Framework**.
  - There will still be updates, primarily to support Windows and Security updates.
- The **.NET Framework 4.8** will continue to be distributed with future releases of Windows.
  - It will be supported for as long as the version of Windows it was released with is supported.
  - Windows 10 – released July 2015, end-of-life is October 2025.
  - Windows 11 – released October 2021, likely 10 years from release per Windows 10.
- It is the final version of the **.NET Framework**, all future work going into the **.NET** platform.

Microsoft .NET

- **.NET** is the future as the **.NET Framework** will not be developed further.
  - Technically the **.NET Framework** is the original implementation of **.NET**.
- **.NET** is cross platform, i.e., not just Windows, but includes macOS, Linux etc
  - This does not mean finPOWER Connect will support these Operating Systems.
- **.NET 6** was released in November 2021.
  - It is the first version of **.NET** to fully support Applications using Windows Forms.
- Since this is the first version of the **.NET** Platform supporting Windows Forms we want to be cautious and let **.NET** mature first.
- Even number releases are better as they provide Long Term Support (LTS).
  - LTS = 3-year life cycle, non-LTS = 15 months.
  - **.NET 6** due November 2021.
  - **.NET 8** due November 2023.
- More information:
  - https://dotnet.microsoft.com/platform/support/policy
  - https://dotnet.microsoft.com/platform/support/policy/dotnet-framework

Visual Basic vs C# (C Sharp)

finPOWER Connect is written using Microsoft Visual Basic.

We currently have no plans to migrate the core finPOWER Connect Business Layer from Visual Basic to C#.

We realise many software programmers prefer C# and therefore we have reviewed how best to support C# programmers in the future.

- Scripting within finPOWER Connect can be written in either Visual Basic or C#.
- The language syntax between Visual Basic and C# is quite different.
  - However, programming concepts like variables, functions, conditions, loops etc are standard to both languages.
- Both languages use the same underlying **.NET Framework** and **.NET CLR**.
  - They were developed together to be part of the same **.NET Framework** platform.
- Most samples provided with finPOWER Connect are currently written in Visual Basic.
  - We provide a few examples of C# based scripts to help C# programmers – and for us to test internally.
  - For example, there is a sample Client Interest Advice Document available.
    - See https://www.intersoft.co.nz/Support/KbArticle.aspx?id=19139

NOTE: A software Programmer's biggest learning curve will undoubtedly be learning the finPOWER Connect Business Layer and how to best use it – rather than the language used to access it.

- We are already changing our programming style to lessen our reliance on the Microsoft.VisualBasic namespace and to make it easier for C# programmers.
- For example:
  - Change from using Visual Basic String functionality.
  - E.g.,
    - Len(s)=0 to String.IsNullOrEmpty(s)
    - InStr(s, "\") to s.IndexOf("\")
- This will happen over time, and you should gradually see sample scripts etc change to use more standard **.NET** coding.

IMPORTANT: Programming support from Intersoft Systems for C# may be limited.

NOTE: There has been speculation that Microsoft is stopping development of Visual Basic, but this is not true.

Microsoft offers three languages on the .NET platform – C#, F#, and Visual Basic – and they remain committed to full support for all three languages.

For more information see https://devblogs.microsoft.com/dotnet/update-to-the-dotnet-language-strategy/ and https://learn.microsoft.com/en-us/dotnet/fundamentals/languages.

Obsoleted Functionality and Old Technology

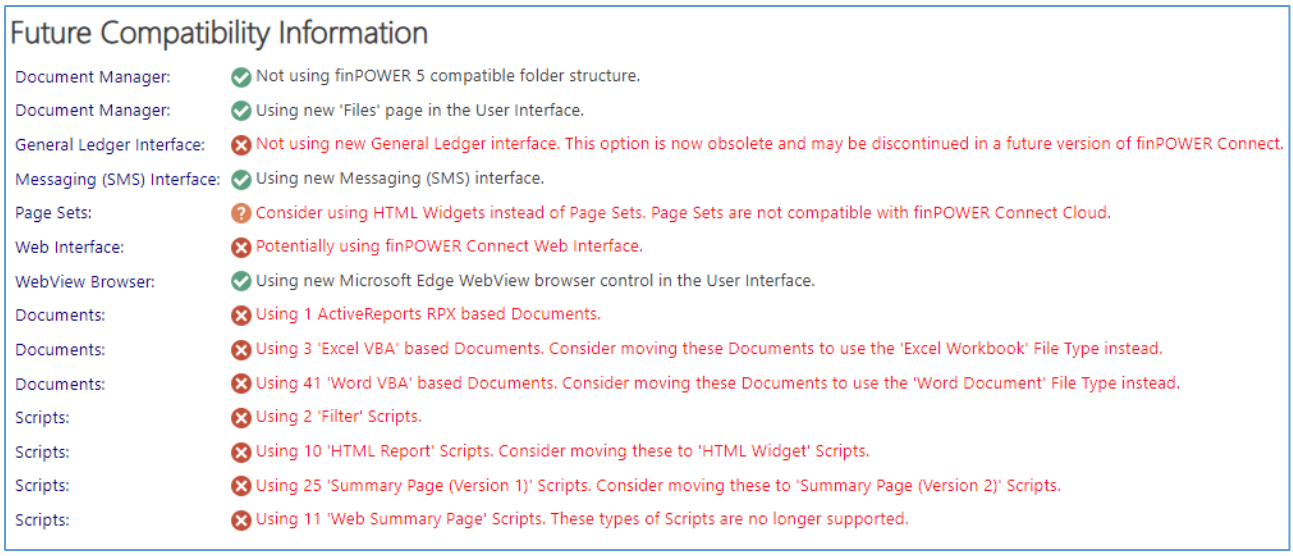
- There is a lot of old code that clutter and bloat finPOWER Connect, and this hinders development.
  - Maintenance of old code takes time away from developing new functionality.
- There is a cost to support obsoleted functionality.
  - Maintaining two versions of the same or similar functionality.
  - Extra overhead when adding new functionality:
    - Intersoft needs to consider the effect of changes on old code.
    - There is additional testing overhead.
  - There is the potential that script code that uses obsoleted functions/ properties no longer works as expected?
    - E.g., Global Settings Centrix Subscriber Id; SET does nothing, GET maps to Resolved (Test/Production) Global Cost Centre which may or may not be valid.
- Newer features may only be added to new interfaces, e.g.
  - Bank Interface to General Ledger interface.
- As technology evolves, support for functionality may be compromised and itself be obsoleted.
  - For example, the SmtpClient used to send Emails in the **.NET Framework** is now obsoleted by Microsoft.
    - https://docs.microsoft.com/en-us/dotnet/api/system.net.mail.smtpclient?view=netframework-4.8
- It may not be possible or easy to add new functionality and keep compatible with older interfaces.
  - E.g., adding an interface to SharePoint or Dropbox for Document Manager.
  - Some functionality may not be removed but left as either incompatible or not further developed.

Reviewing Obsoleted Functionality and Old Technologies

Support Information "Future Compatibility Information"

A "Future Compatibility Information" section has been added to Support Information (under Help, Support menu).

- This highlights potential areas the User should review.
  - E.g., Shows Documents still using Word or Excel VBA File Types.
- Sample output is shown below.

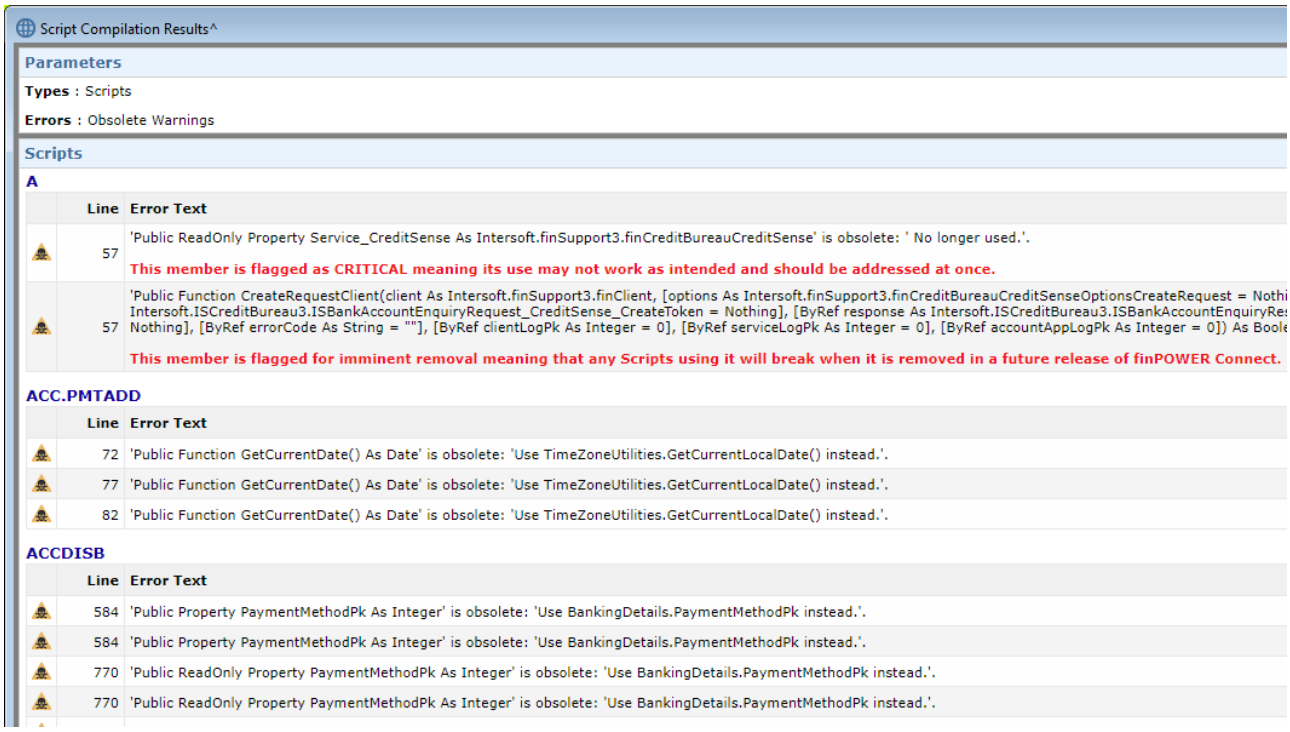


Business Layer Help.

- Includes a topic listing obsoleted functionality.

Script Compilation Errors Report (under Tools, Utilities menu).

- Provides a list of Business Layer functions used in the Script that are obsolete.
- Use this to highlight issues that need re-working, ready for upgrading to a later version of finPOWER Connect.
- However, it should be run immediately after installing a new version to see the list of actual errors once functionality has been removed from the Business Layer.
- A sample Report is shown below.



Script Compilation Results^

Parameters

Types : Scripts

Errors : Obsolete Warnings

Scripts

A

	Line	Error Text
	57	'Public ReadOnly Property Service_CreditSense As Intersoft.finSupport3.finCreditBureauCreditSense' is obsolete: ' No longer used.'. **This member is flagged as CRITICAL meaning its use may not work as intended and should be addressed at once.**
	57	'Public Function CreateRequestClient(client As Intersoft.finSupport3.finClient, [options As Intersoft.finSupport3.finCreditBureauCreditSenseOptionsCreateRequest = Nothi Intersoft.ISCreditBureau3.ISBankAccountEnquiryRequest_CreditSense_CreateToken = Nothing], [ByRef response As Intersoft.ISCreditBureau3.ISBankAccountEnquiryRes Nothing], [ByRef errorCode As String = ""], [ByRef clientLogPk As Integer = 0], [ByRef serviceLogPk As Integer = 0], [ByRef accountAppLogPk As Integer = 0]) As Boole **This member is flagged for imminent removal meaning that any Scripts using it will break when it is removed in a future release of finPOWER Connect.**

ACC.PMTADD

	Line	Error Text
	72	'Public Function GetCurrentDate() As Date' is obsolete: 'Use TimeZoneUtilities.GetCurrentLocalDate() instead.'.
	77	'Public Function GetCurrentDate() As Date' is obsolete: 'Use TimeZoneUtilities.GetCurrentLocalDate() instead.'.
	82	'Public Function GetCurrentDate() As Date' is obsolete: 'Use TimeZoneUtilities.GetCurrentLocalDate() instead.'.

ACCDISB

	Line	Error Text
	584	'Public Property PaymentMethodPk As Integer' is obsolete: 'Use BankingDetails.PaymentMethodPk instead.'.
	584	'Public Property PaymentMethodPk As Integer' is obsolete: 'Use BankingDetails.PaymentMethodPk instead.'.
	770	'Public ReadOnly Property PaymentMethodPk As Integer' is obsolete: 'Use BankingDetails.PaymentMethodPk instead.'.
	770	'Public ReadOnly Property PaymentMethodPk As Integer' is obsolete: 'Use BankingDetails.PaymentMethodPk instead.'.

NOTE: In the case that you find an issue, you can continue to use the existing finPOWER Connect version until you have worked through issues.

Removing Obsoleted and Old Functionality

- Whilst Intersoft would love to remove all obsoleted functions this is not practical for some Users.
- When a function or property is flagged as obsolete this is a warning that it should be avoided as it might be removed in the future.
  - The function will also be hidden in script intellisense.
  - **A script will break if it uses an obsoleted function that is removed.**
  - Most obsoleted functions will provide information on an alternate function to use.
- Where an obsoleted function or property is noted as "**CRITICAL**" it means:
  - It is likely to cause issues if continued to be used.
  - It may no longer be valid to use. For example, it always returns False or a Blank string and the setter does nothing.
  - It may not work as expected as it doesn't factor in more recent changes to finPOWER Connect.
  - These functions and properties will likely be removed in version 6.
- Some obsoleted functions and properties are marked as "**IMMINENT**"
  - This normally means the function or property is very obscure or has been obsoleted for a long time.
  - These functions and properties will likely be removed in version 6.
- Some obsoleted functions and properties are marked as "**ALTERNATE**".
  - When this is defined it means the obsoleted function or property has an alternative that should be used - but its fine to continue using the existing function or property for now.
  - The alternate function may provide better functionality, additional parameters, be future proofed or may be more compatible with C#.
- **WARNING:** Other functions, not flagged as "CRITICAL", "IMMINENT" or "ALTERNATE", might still be removed in a future version.
  - With finPOWER Connect Version 6, and the change from the **.NET Framework** to **.NET**, there may be times where it is unavoidable that a function needs to be replaced.
    - In this case it may not be possible to flag as obsolete prior to Version 6.
  - If such a situation arises more information will be provided.

Removing Old Technologies

- Old functionality may be removed.
  - E.g., in version 6.0 we expect to only support the "New General Ledger Interface".
- This means a script will break if it uses functionality that has been removed.
  - This is a bigger breaking change than removing obsoleted functions and it would not be as simple as changing from function GetUnclearedFunds to GetUnclearedFunds2.
- Should any old technology be kept?
  - We would encourage feedback on this.

Outdated Functionality

- Some functionality is actively and strongly discouraged.
  - For example, if the functionality will never be moved to finPOWER Connect Cloud.
- DO NOT use going forward if possible.
- If you currently use, plan to update such functionality in the next few years.

- Functionality likely to be removed in the future:
  - Documents.
    - Word VBA and Excel VBA.
    - Not supported in finPOWER Connect Cloud.
    - Move to the newer Word Document and Excel Workbook File Types.
  - Filter Script Types.
    - The Task Manager (version 2) will not (cannot) support this Script Type.
    - It is likely that HTML Widgets become the recommended solution.
    - Not supported in finPOWER Connect Cloud.
  - HTML Report Scripts.
    - These are superseded by HTML Widgets.
  - Summary Page (version 1) Scripts.
    - These have been superseded for years by Summary Page (version 2).
  - Web Summary Page.
    - These were introduced for the finPOWER Connect Web Interface - which has been unsupported for many years.
  - Workflow Types (version 1).
    - Superseded many years ago by version 2 Workflows.
    - Not supported in finPOWER Connect Cloud.
    - Our built-in Summary Page does not support these.

- Other Functionality, unlikely to be removed in version 6.
  - Account Applications.
    - Data Capture method of "Page Set" not supported by finPOWER Connect Cloud.
  - Action Script Types.
    - Not supported in finPOWER Connect Cloud.
  - Global Settings.
    - General, Search.
    - Many of the "Quick Search options" may become obsolete with the introduction of Quick Search (version 2).
  - Page Sets.
    - Should be discouraged as not available in finPOWER Connect Cloud and Task Manager (version 2).
    - Use HTML Widgets instead.
  - "Smart List" Scripts.
    - These were originally added to support Task View, which will be removed in version 6.
    - Use HTML Widgets instead.
  - User Preferences.
    - Tasks & Workflows, General.

- The Page Set for the Task Manager 'Home' page will not apply when using Task Manager (version 2).

- Wizard Validator Scripts.
  - HTML Widgets or Object Event scripts should be used as an alternative.

finPOWER Connect Version 4

- finPOWER Connect 4.0.0 was released in December 2022.
- Continues to use the **.NET Framework 4.8**.
- Main focus was finPOWER Connect Cloud.
- Continued development during 2023.

Upgrading to Version 4

- Version 4.0.x uses the same database as version 3.4.x.
- **This means you can install version 4.0.x and test it works as expected - without having to upgrade your database and lose compatibility with the current version you are running**.
- For example, if a script fails to compile because it uses functionality that has been removed you can continue using version 3.4.x whilst you review and update the script.

Web Browser Control

- The existing "Internet Explorer" based Web Browser control within finPOWER Connect desktop has been replaced.
  - Microsoft has introduced an Edge (Chromium) based WebView2 control.
  - Microsoft is disabling Internet Explorer in Windows 11.
  - The MSHTML engine is still included in Windows 11, so finPOWER Connect 3.x.x will still work.
    - https://www.theverge.com/2021/6/25/22550714/microsoft-windows-11-internet-explorer-disabled
- For more information:
  - https://docs.microsoft.com/en-us/microsoft-edge/webview2/
  - https://tomtalks.blog/2021/06/microsoft-teams-2-0-will-use-half-the-memory-dropping-electron-for-edge-webview2/

Document Manager

- To support future development, the following have been removed:
  - finPOWER 5 compatible folder structure.
    - There is a script available that moves files. Use with caution and backup first.
  - Removed the "Use new 'Files' page in the User Interface?" option.
    - The new Files page will always be used.
    - Note, this is conditional upon the finPOWER 5 compatible folder structure being removed.
- By removing these options, it will make it possible to add additional Document Manager providers in the future.

Updated Script Editor

- Updated to a new version of the underlying control.
- The Script Editor now highlights if the script contains obsoleted functions/ properties when the "Compile" button is clicked.
- It will be more obvious that although the script compiled there are warnings that should be reviewed.
  - https://www.intersoft.co.nz/Support/KbArticle.aspx?id=18762

Quick Search – version 2

- Optimised Search using a new table in the database.
- The current Quick Search is based upon all the magic happening when searching – but that means it is very complex and makes many complex database queries when searching.
- Quick Search (version 2) changes this so the real work is done when data is saved and therefore the search queries are simpler and faster.

Task Manager – Version 2/ Task View

- Bring into line so finPOWER Connect and finPOWER Connect Cloud work the same way.
- Task Manager – Version 2
- Task View in finPOWER Connect Cloud is obsoleted.

finPOWER Connect Web Interface

- This is very old technology and is no longer supported.

Removing Obsoleted and Old Functionality

- Removed obsoleted functions/ properties.
  - Especially where denoted as "CRITICAL" or "IMMINENT".

finPOWER Connect Version 4.1

- Continues to use the **.NET Framework 4.8**.
- Likely release date, first or second quarter 2024.

Upgrading to Version 4.1

- Version 4.1.x will update the database and therefore is incompatible with previous versions of finPOWER Connect.

finPOWER Connect Cloud

- We will continue work on finPOWER Connect Cloud to implement more finPOWER Connect functionality.

Clients

- Review and increase the length of Client Name information where applicable.
- Add Review Date.

User Defined Data

Some tables in the database support User Defined Data, this consists of a UserData ISKeyValueList item which can store virtually unlimited data. However, this data is not easily queried.

So, some tables also include User0 to User 9, i.e., 10 separate columns that can be easily queried on.

We will increase the number of separate User column from 10 to 20 in the following tables:

- Account
- Account Archive
- Client

In addition, we will review the following tables and may implement the same change:

- Account Application
- Account Application Applicant
- Account Application Collateral
- Account Type
- Department
- Document Manager File
- Entity
- External Party
- Pool
- Security Statement
- Security Statement Item
- User
- Workflow

In addition, UserData is audited, so using it to store data that is constantly changing bloats the database. We will introduce a new option to ISKeyValueList to indicate to not audit a value.

Zepto PayTo

- Implement the Zepto (formerly Split Payments) interface to PayTo in Australia.

Bank Transactions

- Add a link from the Fee charged when reversing a Payment to the Bank Transaction reversal.
- Record the User and Date/ Time a Suspense Item was deleted.
- Add an option to include Suspense Items in a Bank Lodgement.
  - Note, this may be deferred to version 6.1.

Data Retention

Most Users like to keep data as long as possible, however, privacy, compliance and recent data breaches have highlighted that removing data that is no longer required is important.

- Privacy normally dictates the data should be purged as soon as possible.
- Compliance typically means that data needs to be keep to meet legal and regulatory requirements.

We will be reviewing this area carefully and implementing data purging on a more granular level. For example, Remove Centrix Commercial Credit Enquiries more than x days old.

CRM

- We will be reviewing options to integrate finPOWER Connect to CRM applications.
- This is a long term project and may be delayed until database changes in version 6.1.

finPOWER Connect Version 6.0

- Likely release date, first or second quarter 2025.
- The key focus of finPOWER Connect version 6 will be upgrading to **.NET 8**.
  - **.NET 8** will be released by Microsoft in November 2023.
  - **This is a major technology upgrade.**
- No database changes.
  - Compatible with the current version of finPOWER Connect 4.1.x database.
- Rebrand to distinguish this is a major new version.
- Old Interfaces and Obsoleted Functionality.
  - Review support for and drop where appropriate.
  - The bottom line is - if it's too hard to remove support for something because of User feedback we may have to keep support going. However, this may mean a compromise on future functionality.

Updated Third Party Components for .NET

- **.NET** will also force us to update and review third party components that we use.
  - We do not know what complications there might be.
- This includes:
  - Actipro Syntax Editor; Script editor.
  - Evo HTML to PDF; creates PDF files.
  - GemBox Document, Spreadsheet and Email; used to generate Word and Excel Documents.
  - GrapeCity ActiveReports; used to generate Reports.
  - Infragistics; Grid and Tab controls.
  - Newtonsoft JSON utilities.
    - This may be replaced by native Microsoft JSON utilities built into **.NET**.

User Interface Review/ Refresh

- A review of the User Interface will be made and perhaps some changes to the User experience.
  - By 2025 there will likely be fresh ideas on what makes a great User Interface.

Filter Script Types

- The Task Manager (version 2) cannot support this Script Type.
- Not supported in finPOWER Connect Cloud.
- Use HTML Widgets instead.

HTML Report Scripts

- These are superseded by HTML Widgets.

Searching/ Lists

- Remove original Quick Search in favour of Quick Search 2.
- Remove Account, Client Lists.
  - Use Quick Search instead.
- Remove Account, Client and Security Searches.

- Use Quick Search instead.

Task Manager

- Remove Task Manager (Version 1).
- Use Task Manager (Version 2) instead.

Tasks View

- Remove Tasks View from finPOWER Connect Cloud.

Web Summary Pages

- These were introduced for the finPOWER Connect Web Interface - which has been unsupported for many years.

finPOWER Connect Version 6.1

- Continues to use **.NET 8**.
  - May upgrade to .NET 9 if applicable.

Upgrading to Version 6.1

- Version 6.1.x will update the database and therefore is incompatible with previous versions of finPOWER Connect.

Logs

- Add option to categorise Account and Client Logs.
- Add option to record Notes as HTML as well as plain text.
  - This means formatting such as bold, lists etc can be supported.

User Defined Data

A continuation of changes made in 4.1 to add a new ISUserData table to enhance the ability to store and query on User Data.

The table will be more dynamic and allow any data to be stored and retrieved.

Note: this table may be added in version 4.1 and implemented in full or partially prior to version 6.1.

Security Statements

The relationship between Accounts and Security Statements means a Security Statement can be linked to multiple Accounts, but an Account can only relate to one Security Statement.

This means an "Item" (Collateral) can only be linked to one Account. The alternative is to link via Clients, or duplicating the Item is two Security Statements.

We will review allowing Security Statement Items to become their own "Asset" and be linked to multiple Accounts and Security Statements.

Note, this would be a major structural change and therefore needs careful review before we commit to any changes. We don't want to make finPOWER Connect more complicated for Users, and we don't want to break existing functionality.

Document Management

We have already blogged about how Users can use cloud-based Document Managers such as Microsoft SharePoint (OneDrive) and DropBox. See:

- https://www.intersoft.co.nz/Blog/Default.aspx?id=BLOG.20230918.UNC.DocMan.OneDrive
- https://www.intersoft.co.nz/Blog/Default.aspx?id=BLOG.20230918.UNC.DocMan.Dropbox

We will review native integration to cloud-based services. However, as there are workarounds this may not be high priority.

Alerts

- New facility to add Alerts.
- For example, when the Monitor Category of an Account changes.

Reminders

- New facility to add Reminders.

- This would be like calendar appointments/ reminders found in other applications – but focused on finPOWER Connect needs.
- For example, a reminder to run PPSR Updates could be defined.

General Ledger Interface

- Old interface will be removed.
- The New Interface will become the only interface.
  - The new interface was released in April 2019.
  - https://www.intersoft.co.nz/Support/KbArticle.aspx?id=15935

SMS/ Messaging Interface

- Old interface will be removed.
- The New Interface will become the only interface.
  - The new interface was released in October 2020.
  - https://www.intersoft.co.nz/Support/KbArticle.aspx?id=17206

Email Interface

- Review options to use newer technology.
  - The SmtpClient used to send Emails in the **.NET Framework** is now obsoleted by Microsoft.
  - For more information see https://docs.microsoft.com/en-us/dotnet/api/system.net.mail.smtpclient?view=netframework-4.8

Message Queue

- Review implementing changes to use a message queue to handle Webhook Callbacks.

Licensing

- Review change to a cloud-based licensing facility.

Word/ Excel VBA Documents

- These Document File Types will no longer be supported.
- This is old technology and should be avoided wherever possible.
- Not supported in finPOWER Connect Cloud.
- Are very slow to generate.
- Script must be done inside the Word document using VBA.
- Move to the newer Word Document and Excel Workbook File Types.

Summary Page (version 1) Scripts

- These have been superseded for years by Summary Page (version 2).

Workflow Types (version 1)

- Superseded many years ago by version 2 Workflows.
- Not supported in finPOWER Connect Cloud.
- Our built-in Summary Page does not support these.