Q2 2026

What's New in Joiin

AI agents that act on your books, live Stripe data, one-click drill-downs from any total, and dozens of refinements across reporting, layouts and dashboards. The biggest quarter yet.

🤖 **AI Agents**
Chat that acts, not just answers

🔗 **Connections**
Live Stripe data in Joiin

🔎 **Drill-Downs**
One click from any total

✨ **32 Updates**
Across the whole product

SECTION 01

Joiin Intelligence

01

AI in Joiin goes hands-on. New agents act on your books, build reports and packs on request, and remember every prompt — with a calmer, clearer chat experience throughout.

BIG FEATURE

🤖

Two New AI Agents Arrive in Chat

AI Chat goes from advisor to operator. Two new agents — eliminations and chart of accounts — now act on your books rather than just describing how. Ask, confirm, done.

Built on a new **act-verify-rollback** foundation — every change is confirmed first, shown clearly, and fully traceable.

WHAT THEY CAN DO

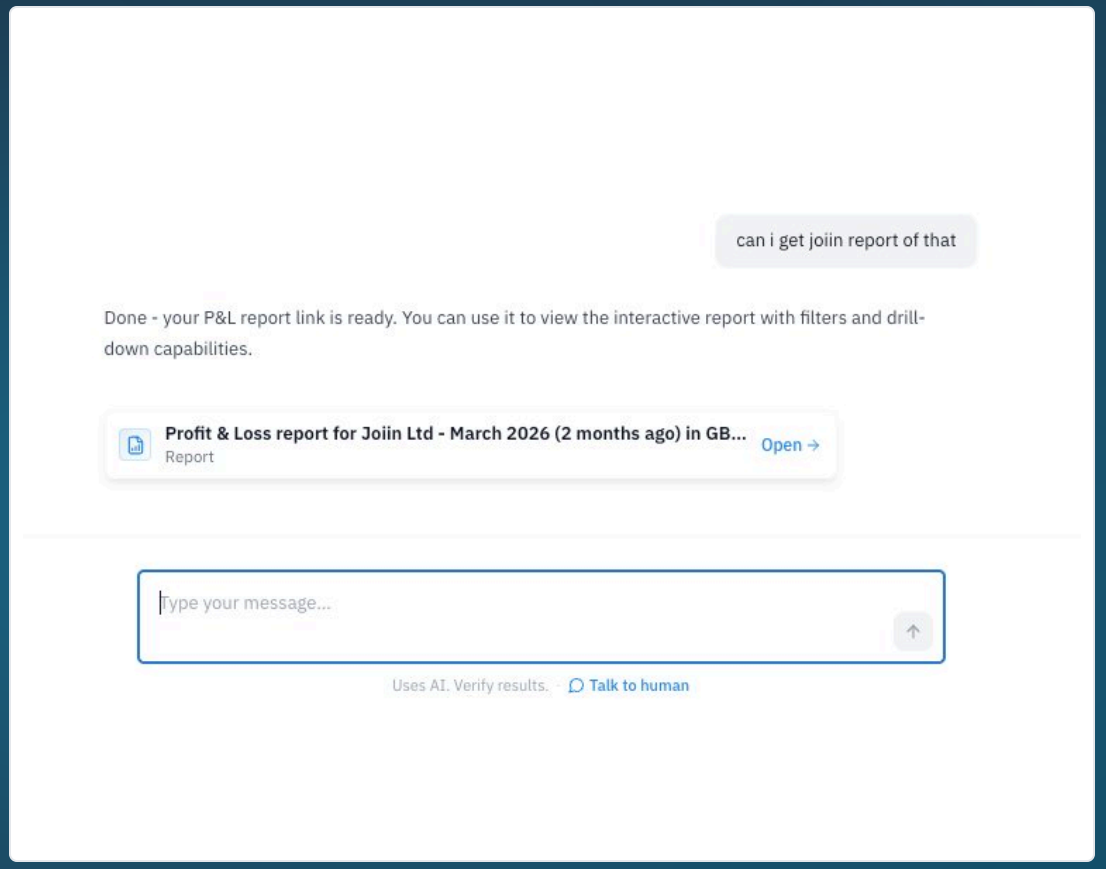
- Elimination agent sets up intercompany loan groups for you
- Chart-of-accounts agent merges duplicates, retypes accounts, scans for issues
- Each agent confirms before making changes and shows exactly what it did
- The start of our agent rollout — much more on the way

🤖

NEW

Build Reports & Packs Straight From Chat

Ask for a P&L or a full board pack and AI Chat hands you a working one — a tile linking to live, interactive output with all the usual filters, drill-downs and exports. Packs save automatically to Saved Reports & Packs.



✨

NEW

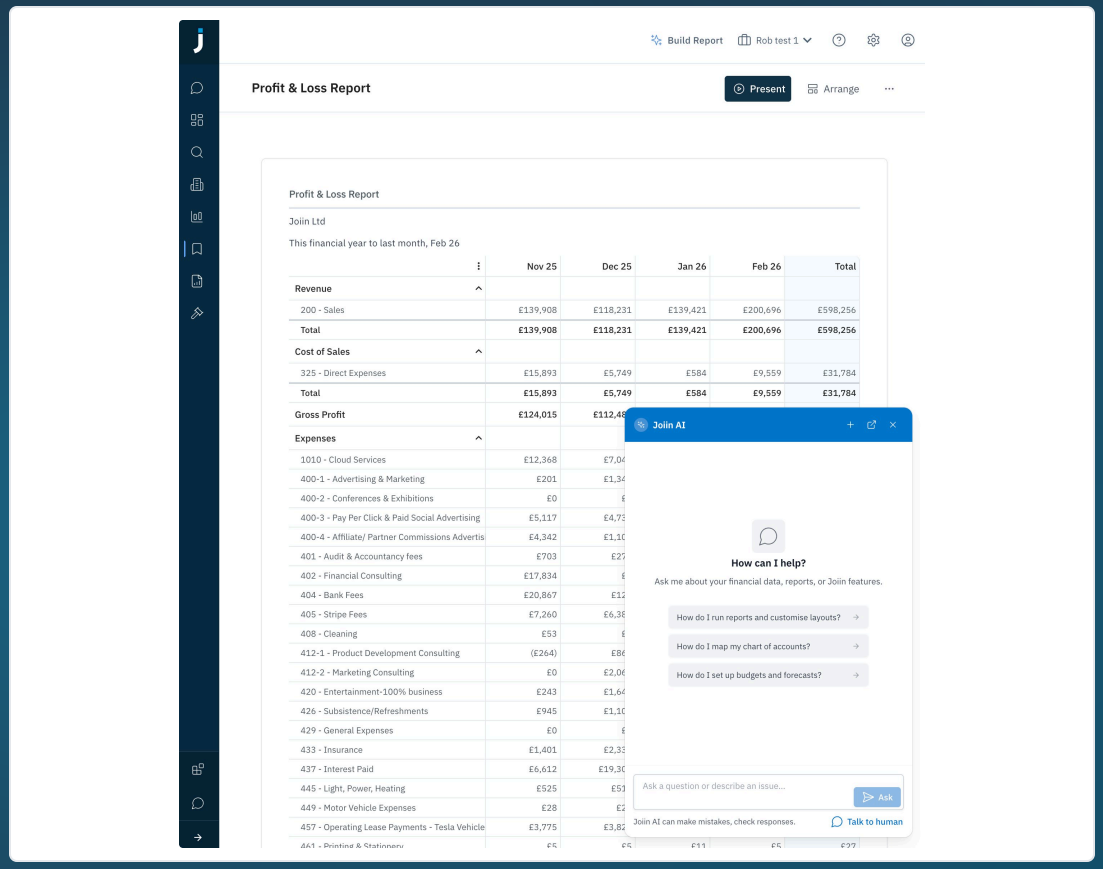
Prompt History in the Report Pack Builder

Every prompt you've used in the AI Report Pack Builder is now saved and visible — what you asked, when, and what it produced. Pick up a previous prompt, tweak it, and run it again without starting from a blank page.

NEW

Joiin AI Answers Support Questions First

Click Chat with us and you're greeted by Joiin AI in a floating panel — instant answers on your data, reports and mappings, with suggested prompts and full history. Need a person? Talk to Human hands you straight over.



ENHANCEMENT

A Calmer Scroll in AI Chat

Long replies now keep your question and the start of the answer in view as they arrive, instead of jumping to the latest text. A floating arrow appears when there's more below — click to fast-forward to the end.

SECTION 02

Joiin Connections

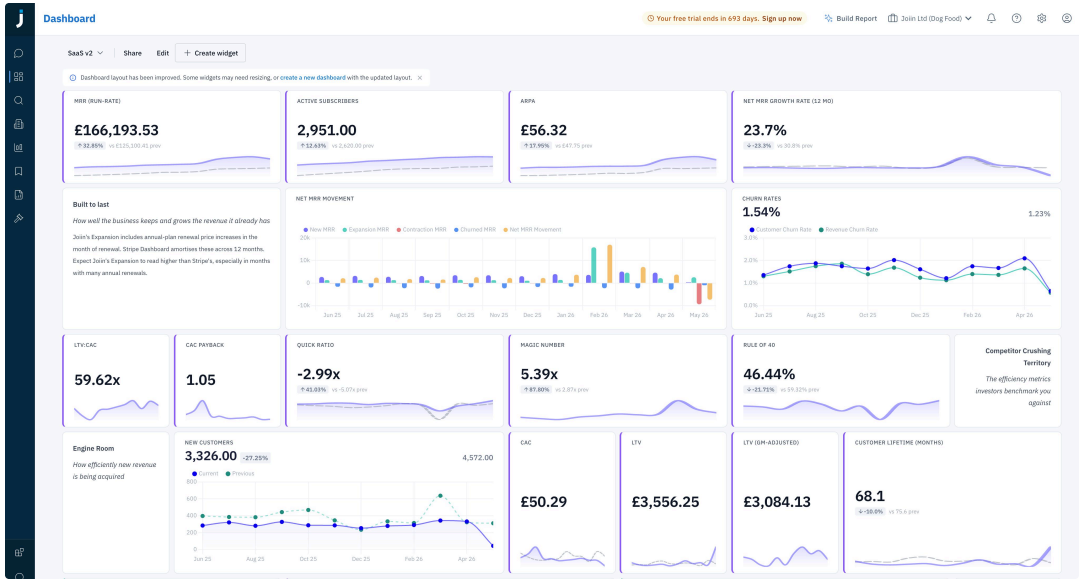
02

A new Connections tab opens Joiin to live data beyond your accounting stack — starting with Stripe. Recurring revenue, SaaS KPIs and a dedicated dashboard, all in one place.

BIG FEATURE

Introducing Connections — Starting With Stripe

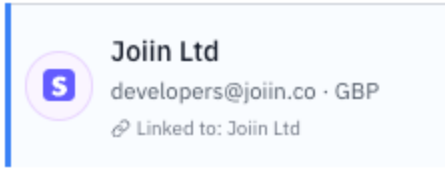
A new Connections tab sits alongside Companies, syncing live Stripe subscription data via a secure OAuth flow. It lands as Non-Financial Data with SaaS KPIs derived automatically — MRR, active subscribers and more — plus a dedicated dashboard tab.



NEW

Connect Multiple Stripe Accounts

Running more than one Stripe account? The single-connection limit is gone — add as many as you need, each via secure OAuth, and map each to the whole client, a single company or a group. SaaS KPIs follow that mapping, so a filtered report shows only the linked Stripe data.



SECTION 03

Drill-Downs and Transactions

03

From any total to the underlying transactions in a single click — with filters that follow you, and full transaction detail without ever leaving Joiin.

MOST REQUESTED

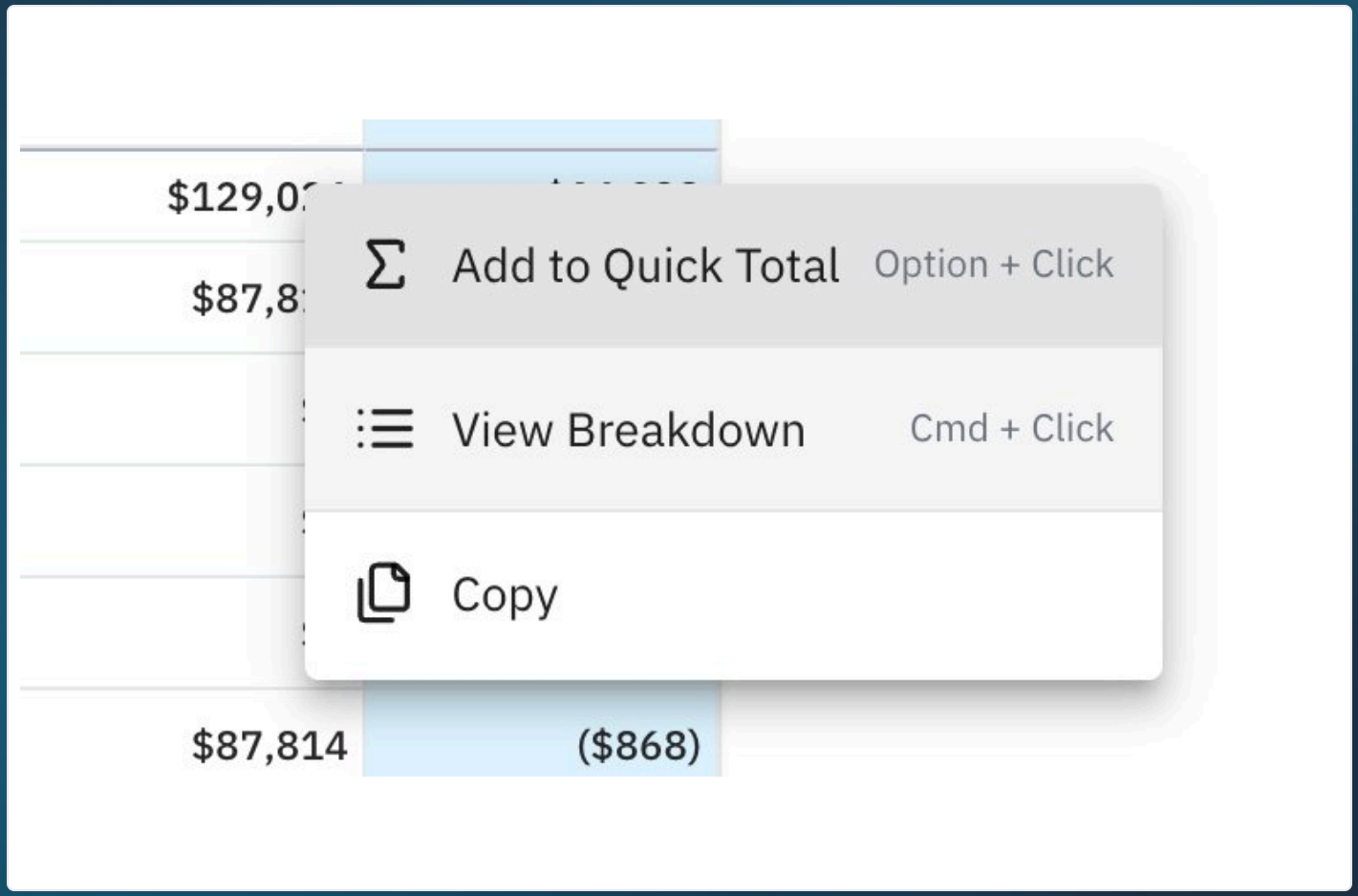
Drill Into Any Total, Not Just Accounts

Group totals and column totals are now clickable. Hit Total Revenue, a YTD figure, a company column total or a period total, and the journals page opens with every underlying transaction — filtered to the right accounts and dates.

One consolidated list. Clicking a total across Q1–Q4 returns one combined view, not four separate trips. "What makes up this number?" finally has a one-click answer.

HOW IT HELPS

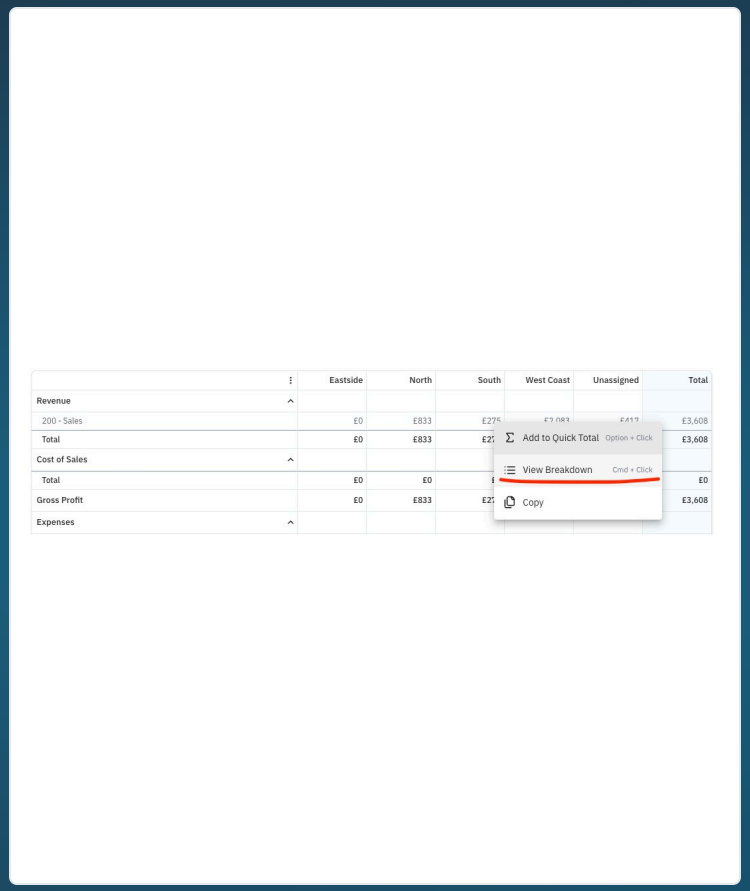
- Every group and column total is now a drill-down point
- Journals page handles multiple accounts and date ranges at once
- Filtered totals return one consolidated transaction list
- Collapses several clicks of stitching into one



ENHANCEMENT

Drill-Down Follows Your Filters

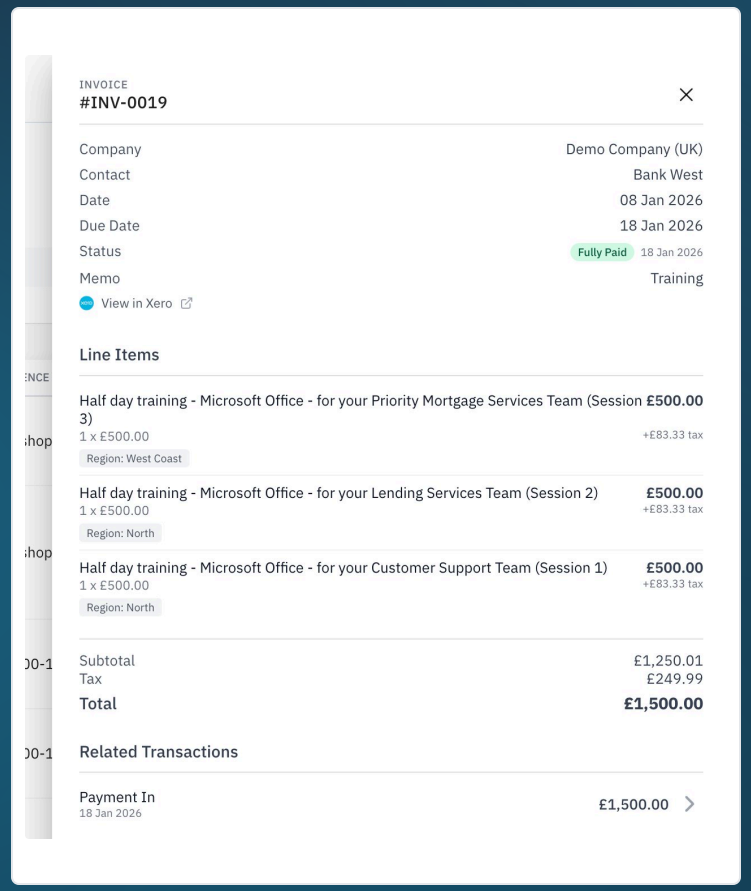
Narrow a report by tracking category, class or location and the journal detail keeps that filter applied — so the transactions match the figure you clicked. The active filter stays visible on the journal page.



NEW

Full Transaction Detail, In Place

Click any invoice, bill or credit note and a side panel opens with the complete detail — line items, tax, contact, dates and status — pulled live from Xero or QuickBooks. No tab-switching, no losing your place.



ENHANCEMENT

QuickBooks Refunds Now in Search

The Search page now captures QuickBooks RefundReceipt transactions — customer cash refunds that were previously missing — mapped consistently as PaymentOut. A complete view of cash movements, automatically on your next sync.

SECTION 04

Custom Layouts and Formulas

04

Deeper nesting, faster editing and finer control over how every formula is formatted — ratios, decimals, sub-account hierarchies and a tidier editor throughout.

📦

ENHANCEMENT

Deeper Group Nesting

The two-level nesting cap is gone. Nest groups to whatever depth your structure needs — Cost of Sales › Labour › FOH › Employees — using the same editor as before. No more flattening to fit an arbitrary limit.

~~2-level cap~~ → UNLIMITED DEPTH

Cost of Sales

› **Labour**

› FOH

› Employees

✏️

ENHANCEMENT

Edit Your Current Layout in One Click

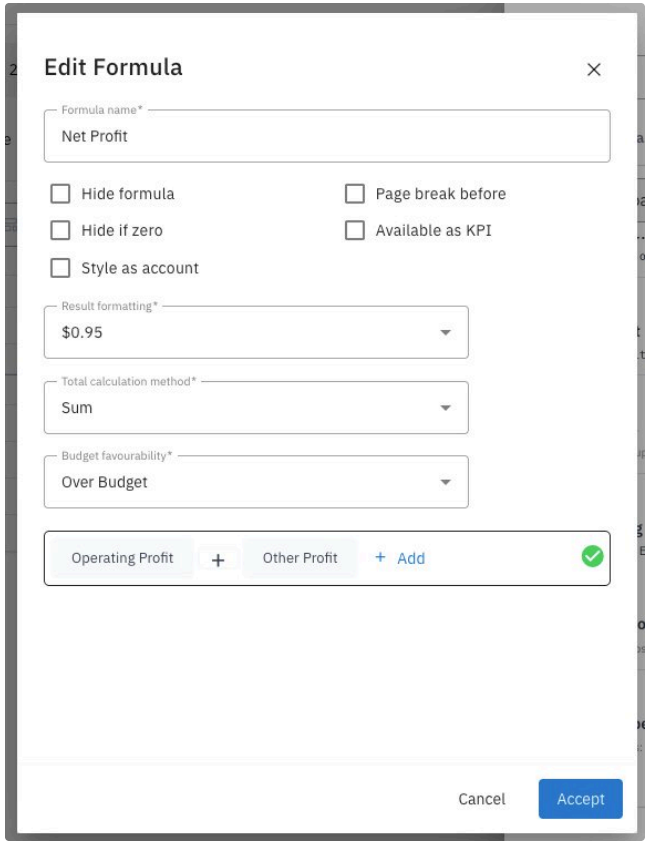
The layout selector now pins your active layout to the top of the list, with new icons to select or edit it instantly. No more hunting through the dropdown for the layout you're already working in.

✨

ENHANCEMENT

A Cleaner, Quicker Layout Editor

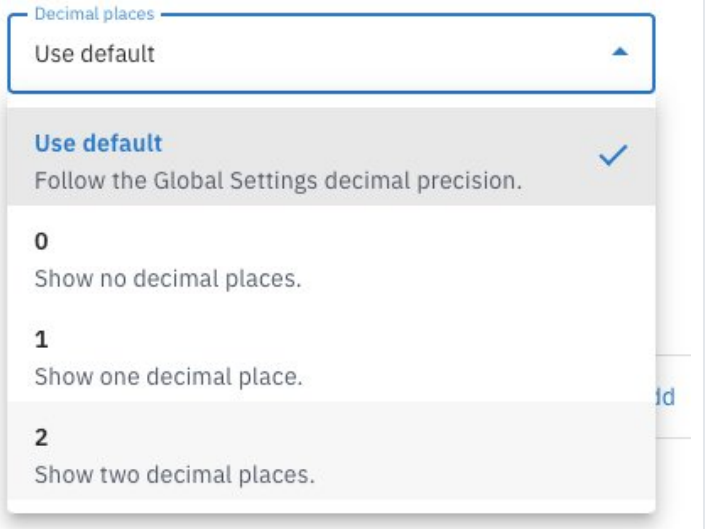
Delete now sits in the three-dot menu alongside Edit and Move, and edit popups are tidied — buttons on one row, checkboxes in two columns, no scrolling off screen. Validation still protects in-use groups and formulas.



NEW

Decimal Places per Formula

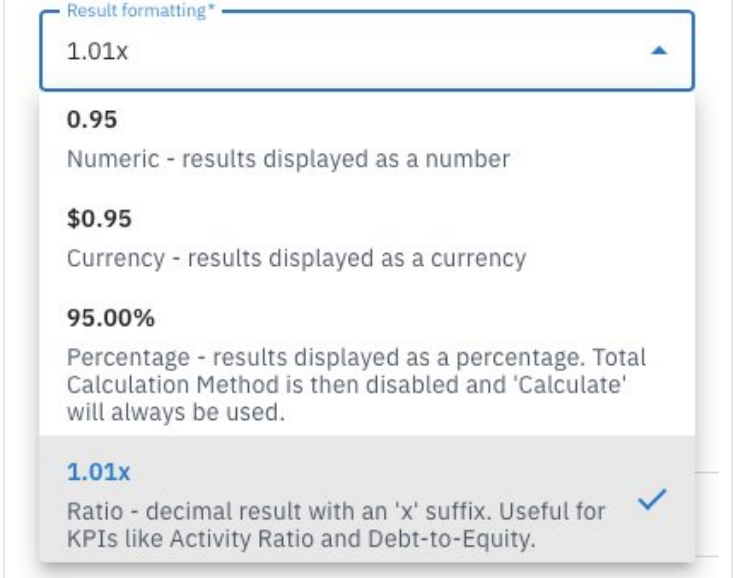
Custom layout formulas gain a Decimal places dropdown — 0, 1, 2, or inherit the global default. It overrides the global hide-decimals toggle per formula, so headline MRR at 0dp can sit beside a Quick Ratio at 2dp in the same report.



NEW

Ratio Formatting

Formulas now support Ratio as a result format, joining Numeric, Currency and Percentage. A result of 1.5 displays as 1.5x — flowing through to custom reports, KPI dashboards, Report Pack widgets and Excel exports.



NEW

Group Sub-Accounts

QuickBooks sub-accounts with colons in their names now nest properly as collapsible sub-groups. A runtime setting, on by default for QuickBooks clients — Xero users with colon-structured names can opt in too.

SECTION 05

Dashboards and Data

05

Sharper KPI tiles, cleaner eliminations, and non-financial data that finally behaves like your financials — currency-aware and visible at a glance across companies and groups.

ENHANCEMENT

Sharper KPI Tiles With Full Context

Sparklines now overlay a dashed comparison line for the previous period, so you can see at a glance how this period stacks up. The variance % badge displays consistently across every tile now, including custom KPIs.

> **More context at a glance** — works for vs-previous-period and vs-budget tiles, and existing widgets pick it up automatically.

ENHANCEMENT

A Balanced View of Eliminations

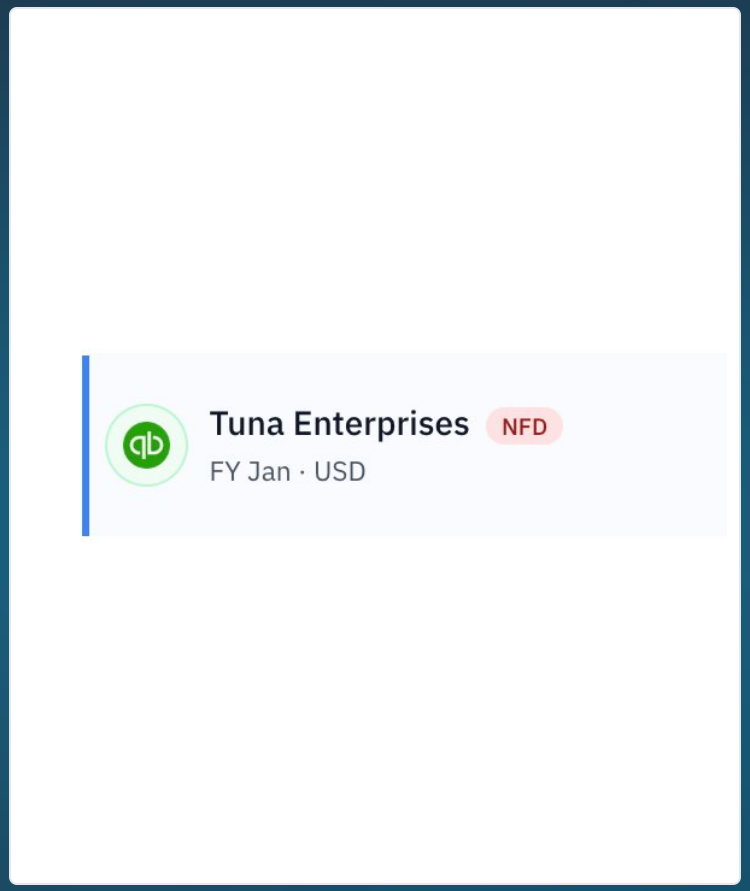
The Show Eliminated Accounts only view now includes the Netting Adjustment — the line Joiin auto-posts to absorb FX-driven differences between intercompany pairs. The figures reconcile cleanly and match your consolidated reports.

- No more chasing small FX residuals you've already neutralised
- Set the option on any Elimination Group — Joiin handles the rest

NEW

NFD Visible on Companies

Companies with non-financial data loaded now show an NFD badge on the Companies page. Click it to jump straight to that company's data — headcount, operational metrics and more — without opening anything first.



NEW

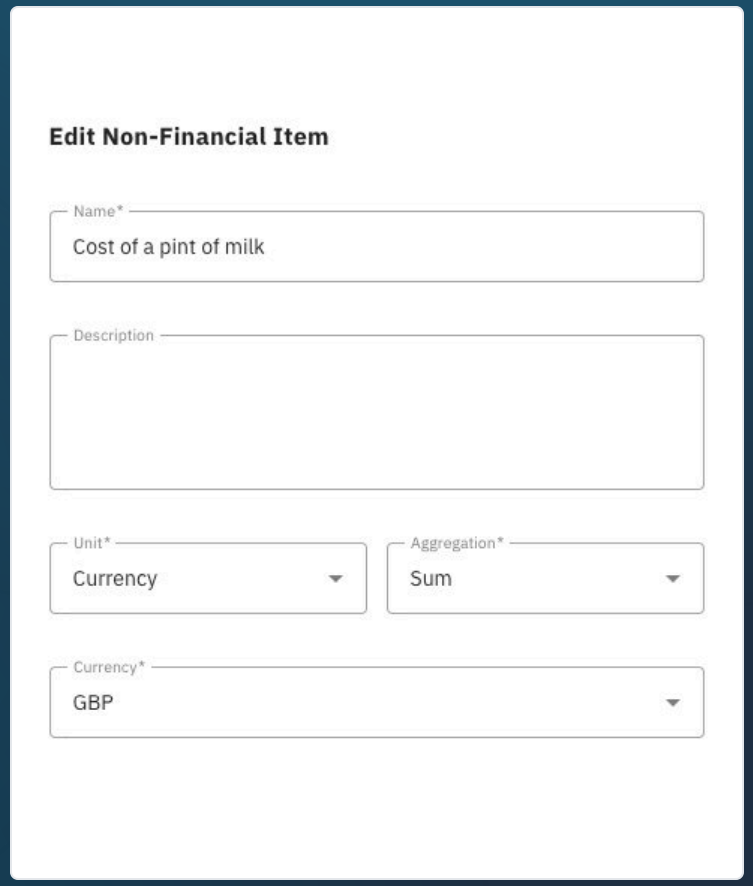
NFD Indicators on Groups Too

The same indicator icon now appears on the Groups page. At a glance, see which groups have non-financial data loaded — bringing consistency across both Companies and Groups.

ENHANCEMENT

Non-Financial Data Is Currency-Aware

Currency-type NFD items now carry a currency and convert using your existing FX rates when a report runs in another currency. Company-linked items inherit the base currency; connection-sourced items inherit the settlement currency.



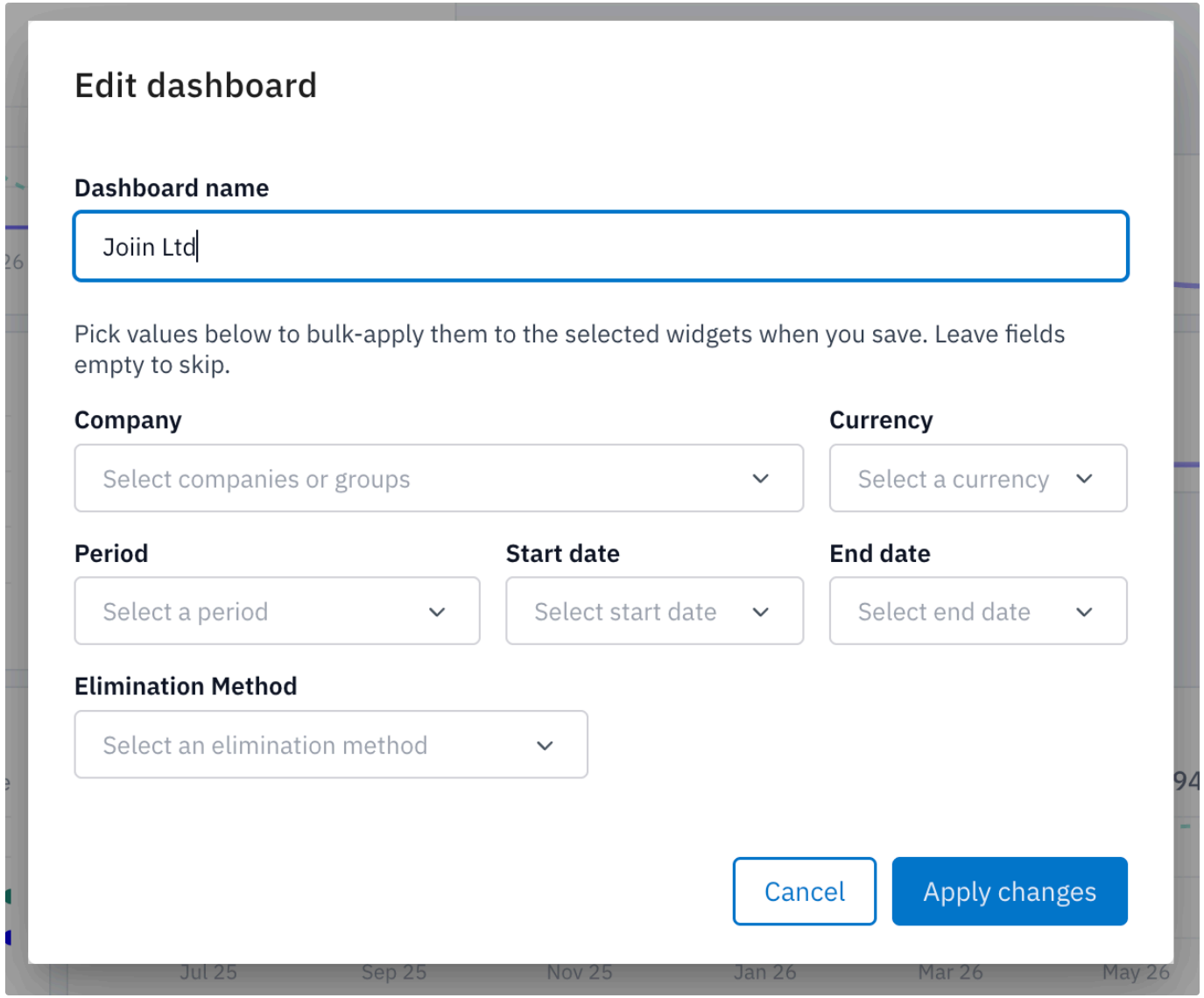
NEW

Set Your Whole Dashboard in One Move

No more configuring widgets one at a time. From the dashboard edit panel, set the currency, reporting period, companies and elimination method across every widget at once.

- A smart default with full flexibility — apply universally, then override any individual widget
- Elimination settings now sit alongside the rest, relabelled simply “Elimination Method”

> **Dramatically faster** to build and maintain — especially when spinning up a new view or switching company or currency.



SECTION 06

More updates across Joiin

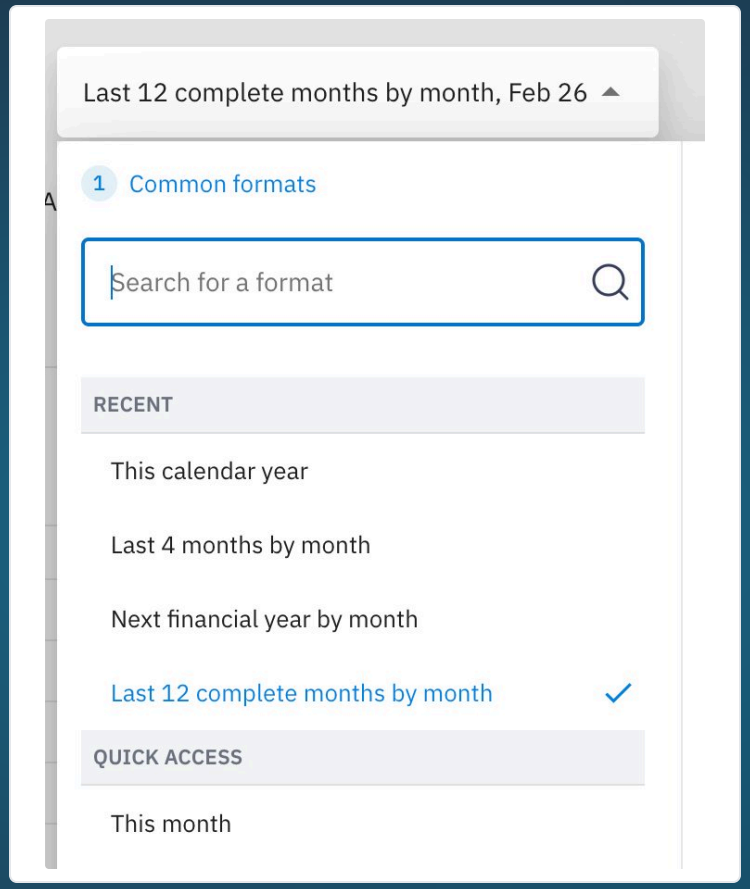
06

Faster sign-in and reports, clearer sync status, painless 2FA recovery, a new trailing-twelve-month format, and a handful of workflow refinements that add up.

NEW

Last 12 Complete Months

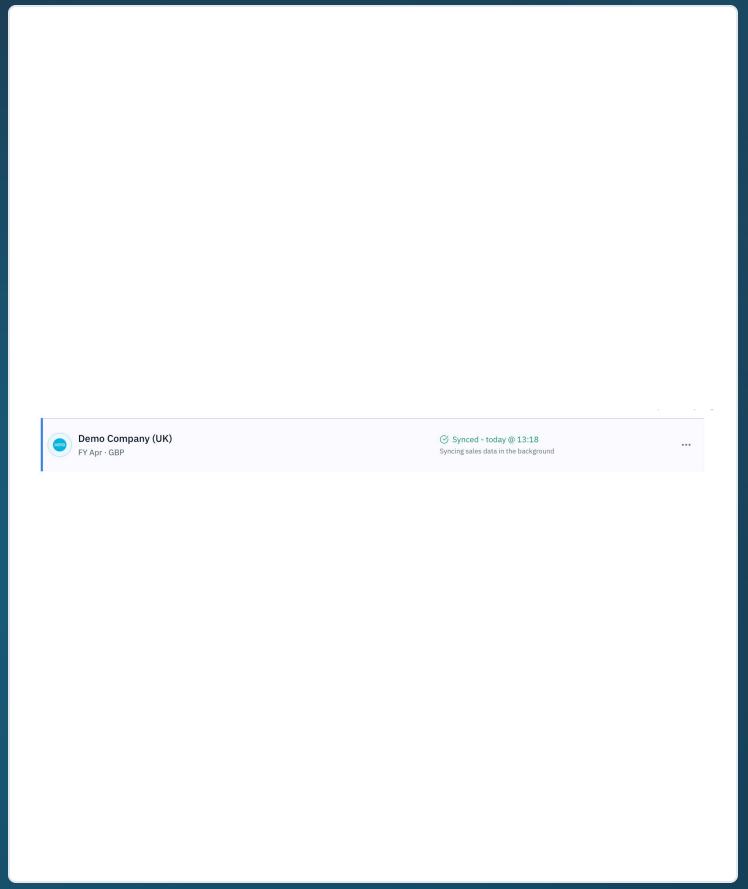
A new common format returns the 12 most recently completed months as individual columns, rolling forward automatically each month. A staple of management reporting, now with no manual date adjustment.



ENHANCEMENT

Sync Status in Plain English

The cryptic [1/2] label is gone. A clear "Synced – today @ HH:MM" appears as soon as your financial data is ready, with a secondary line showing what's still finishing in the background. Run reports straight away.



ENHANCEMENT

Switch a Client User to a Teammate

When a Client User needs broader access, switch them to a Teammate in one click from the Users page — keeping their email and identity intact. No more deleting and re-inviting from scratch.

⚡

ENHANCEMENT

Faster Reports as You Move Around

A new caching layer reduces the work Joiin does when loading reports and data you've already visited in a session. It works at the data layer, so it applies broadly — response times feel more responsive the more you use it.

⚡

ENHANCEMENT

Noticeably Faster Sign-In

The 5–9 second white screen after Sign In is gone, replaced by a progress bar that appears almost immediately. Redundant auth checks and duplicate startup loads have been removed, with a preconnect optimisation on top.

🔐

NEW

Instant Authenticator Recovery

Lost access to your 2FA app? A new "Can't access your code?" link sends a one-time recovery email after your password is verified. The link disables 2FA but doesn't log you in, and it expires after 30 minutes.

ENHANCEMENT

Collapsible Saved Reports Sidebar

The Saved Reports & Packs section in the left nav is now collapsible — fold it away when you don't need it. Joiin remembers your preference, and the same behaviour applies to other collapsible menu sections.

ENHANCEMENT

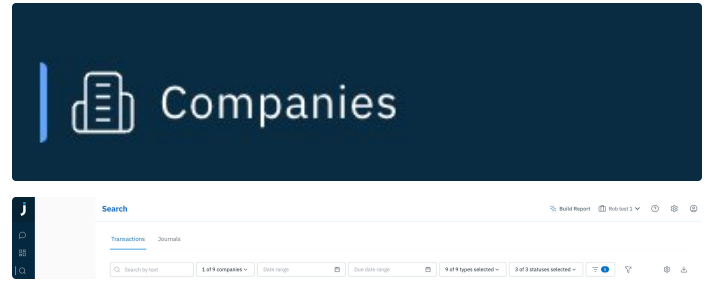
Tidier Report Packs Menu

The Report Packs side-menu item no longer shows an expand control when nothing's starred. It stays collapsed and non-interactive until you have starred packs to show — so what you see is what you get.

ENHANCEMENT

Refreshed Search & Navigation

Visual tweaks across search and list pages, plus a small update to the left-hand menu styling. Nothing has moved — the overall feel is just a little sharper and more consistent.



ENHANCEMENT

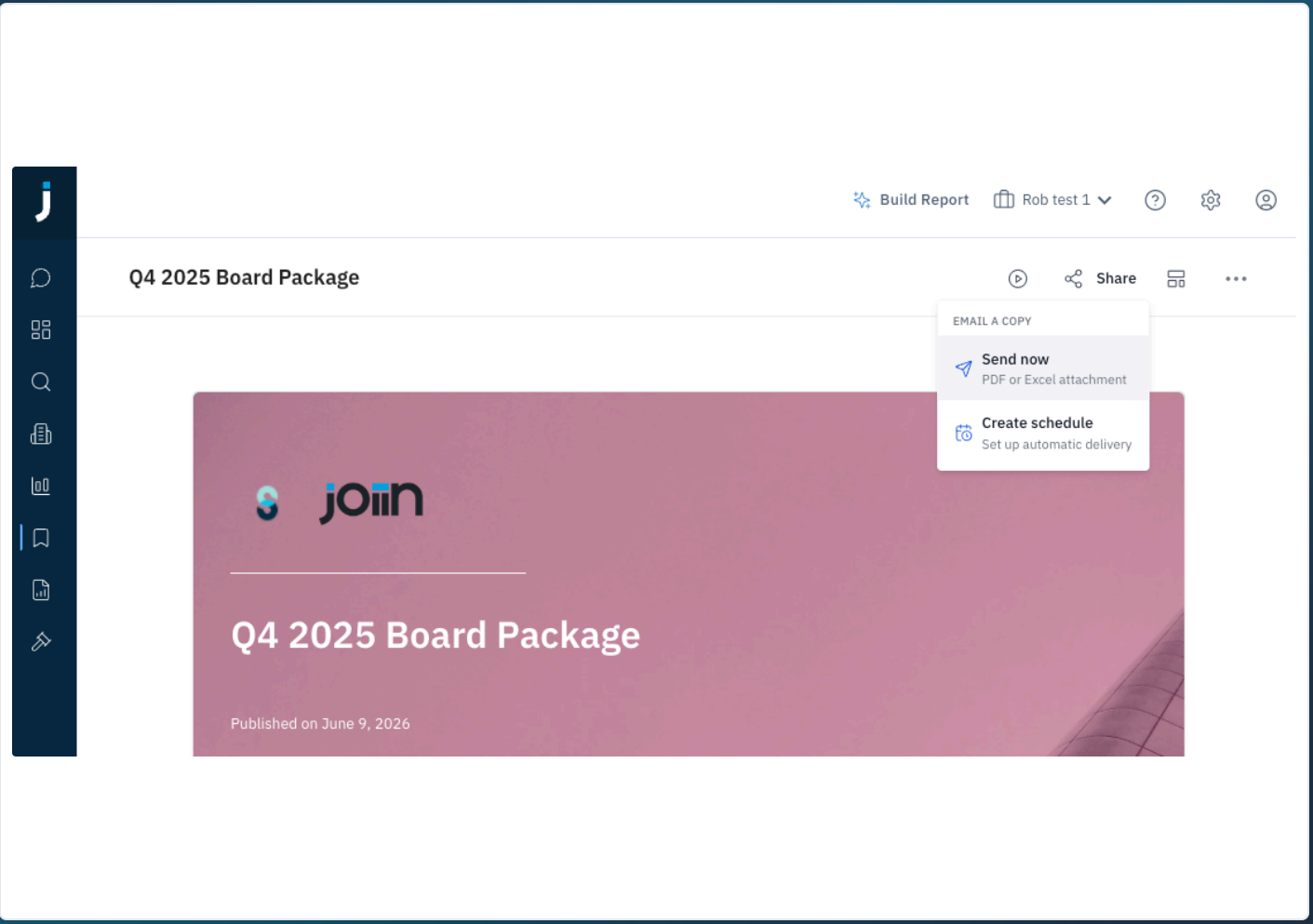
Report Packs: Easier to Share, Smoother to Navigate

Sharing a report pack no longer means going back to the list. A Share button now sits right on the pack view, beside Present and Arrange — create and send a single share link without leaving the pack you're presenting.

Pick up where you left off: drill into a figure mid-pack and you return to the page you were viewing, not page one.

WHAT CHANGED

- Share, Present and Arrange together on the pack view — hover to reveal labels
- Polished sharing dialog with tooltips on every recipient option
- Tidier spacing in the email template



NEW

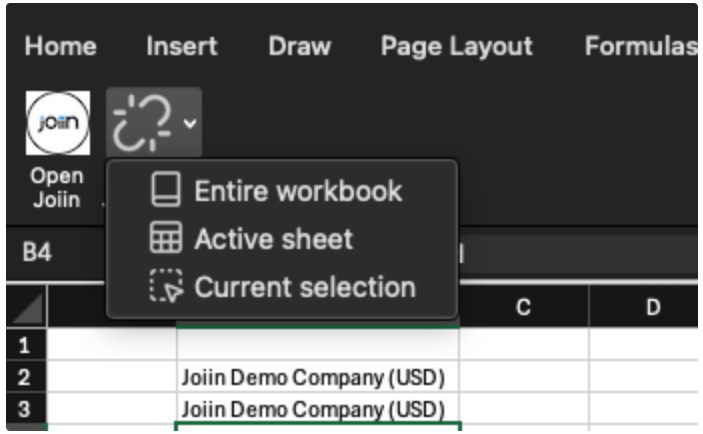
Share Joiin Workbooks — No Add-In Needed

The Joiin Excel Add-In now has a one-click Break Links button that converts your Joiin formulas into plain static values across the workbook — so you can send a report to anyone without the add-in and the numbers still show.

One click turns your live workbook into a clean, shareable snapshot — ideal for distributing reports beyond your Joiin users.

HOW IT WORKS

- Choose your scope — entire workbook, active sheet, or current selection
- Only touches Joiin formulas — other formulas, data and formatting stay intact
- No more copy-and-paste-values gymnastics to strip out Joiin functions
- Find it in the Joiin ribbon, right inside Excel



Q2 2026

Everything in this release

JOIIN INTELLIGENCE / AI

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Saved in the Report Pack Builder

AI Support Chat
Instant in-product answers

Calmer Chat Scroll
Keeps your question in view

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One click to the journals

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Transaction Detail Panel
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Now appear in Search

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No more 2-level cap

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Decimal Places
Per-formula precision

Ratio Formatting
Displays results as 1.5x

Group Sub-Accounts
QuickBooks colon hierarchy

DASHBOARDS & DATA

Sharper KPI Tiles
Comparison line on sparklines

Balanced Eliminations
Netting adjustment now visible

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Badge at a glance

NFD on Groups
Indicator icon added

NFD Currency-Aware
Converts on your FX rates

Bulk Dashboard Edit
Set every widget in one move

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Sync Status
Now in plain English

Switch to Teammate
One-click user change

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Faster Sign-In
Progress bar, no white screen

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Behaves when nothing's starred

Refreshed Search
Sharper search, lists & nav

Report Pack Sharing
Share button on the pack view

Break Links in Excel
Share workbooks, add-in-free

COMMUNITY · RECOGNISED · REWARDED

Joiin Rewards

Has Joiin saved you time, improved your workflow, or helped get group reporting over the line? Share your experience — and we'll reward you for it.

✍️ Leave a review	UP TO 3 ENTRIES
🎬 Share a post or video	1–5 / CHANNEL
📄 Take part in a case study	3 ENTRIES
🔗 Add Joiin to LinkedIn skills	1 ENTRY

🏆 **$500**
Quarterly prize draw

🧢 **Swag**
Limited-run Joiin beanie

🎥 **5× entries**
For video testimonials

⭐ **Featured**
Across Joiin channels

Every qualifying contribution earns a prize-draw entry and a limited-run beanie ·

Winners selected at random · T&Cs apply