

## Upload May 13<sup>th</sup> and 14<sup>th</sup> 2008

### List of Changes

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#### Functionality: Main Administrator Page

**Where:** Main Administrator Page (Portfolio Tab)

**What:** The first page shown for administrators is changed. This new functionality works like Main Client Page but uses transaction records instead. It is possible to use filters to refine the information shown. A more detailed description, on how to use this new main page, will be added in <http://www.financecube.info/TrainingCenter.html>.

The **old screen can be found at the submenu "Client Report"** at the left side. In the future it will not be possible to have client connected directly under the admin user, so this submenu will be removed when all clients here are moved to an adviser. FinanceCube will get in touch with the affected customers.

#### Functionality: Detailed Report

**Where:** Main Administrator Page (icon on the right side)



**What:** This screen gives the network administrator an opportunity to get a detailed transactions record. It is possible to use filters to refine the information shown and click on the table header to sort the information.

#### Functionality: New Column

**Where:** Menu Parent Report

**What:** The company name of the adviser is added as a column in the table.

#### Functionality: New Column Commission Transaction Reports Page

**Where:** Menu Services => Commission Tracker 2 => Transactions

**What:** The provider is added as a column in the table.

#### Functionality: Fact Find

**Where:** Menu Services => Fact Find => FactFind

=> File Upload, pg 12 (documents)

**What:** It is now possible to download uploaded files.