

Upload May 20th 2008

List of Changes/Corrections

Functionality: CRM Security

Where: Personal => Network Main Setup=> CRM Security

What: This change will only affect those who use the CRM service! According to the MiFiD rules, network has now the ability to lock documents so it could not be possible to delete or edit the documents attached to a task in CRM. Network Administrators have access to set up this feature under the CRM Security heading in the "Network Main Setup" page. They can select a label from the lock label drop down list or write a new one and then by pressing on the right arrow they can lock the label and save it. Tasks registered with this label in the CRM service will be locked. Only the administrators will then have the possibility to change and delete documents that are locked.

Functionality: Network Settings

Where: Personal-> Network Main Setup.

What: The menu Network Setting has been removed, and all contained functionality has been transferred inside Personal-> Network Main Setup.

Functionality: CRM Search Engine

Where: CRM->Search

What: Added ability to search for clients/prospects that don't belong to any Category OR for clients/prospects that belong to any Category.