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List of Changes/Corrections

Functionality: Generate Transactions

Where: Personal-> Network Main Setup
What: Activates the functionality of sending transaction orders to predefined emails. Network Administrators can activate this feature by selecting “Yes” on Use Generate Transactions.

Functionality: Generate Transactions

Where: Portfolio-> Generate Transactions (Client level)
What: Advisers/Clients can send transaction orders for execution. They can select instruments for “buying/selling” either from existing ones (in their portfolio) or from those listed in AdvisorCube system. Click on the red arrow if you want to sell or the green arrow if you want to buy. Fill the necessary amounts or units and press accept icon on the right side.
Automatically the transaction will be send to the appropriate persons, set up by Network Administrator in Network Main Setup Page. An extra email is also sent to transactions@financecube.net.

Functionality: My Instrument List

Where: Manual -> My Instrument List and All places where a client is prompted for instrument search.
What: Network/Advisors have the ability to specify a list of "favourite" instruments, in order to facilitate instrument searching. Instruments that are frequently used can be added to this list for easy access. All the instruments that are added to "My Instrument List" of Network Administrator are visible to all Clients/Advisors inside a Network. All the instruments that are added to "My Instrument List" of an Advisor are visible to all Clients belonging to that Advisor Network Administrators, are also allowed to specify list of favourite Instruments, and assigned to different Companies inside a Network. In such a case, Clients/Advisors that belong to a company have access only to the favourite Instruments of the company.
Network Administrators, are provided with the ability to define the default search method inside a Network. This can be done inside Personal - > Network Main SetUp page. They can either choose "All", which will default to searching through all Instruments in Financecube, or they can choose "My Instrument List", which

will default to searching though Instruments defined in Instrument List. In either case, the user can dynamically change his select in when prompted to search for an Instrument.
Video: on http://www.financecube.info/TrainingCenter.html
is a Video, how to set up and use this functionality.

Functionality: CRM

Where: Portfolio -> Main Advisor Page
What: CRM functionality added for shared clients (if CRM is used as a service).