



Upload August 29th 2008

List of Changes

Functionality: Factfind Search engine redesigned

Where: Factfind Service - Search Engine

What: FactFind Search Engine has been migrated to the standard layout. All Fact Find fields are now searchable and better organized according to clients' setups.

Functionality: My Policy Instruments Setup

Where: Manual→My Instrument List

What: Network Administrators, are provided with the ability to specify a list of "favourite" Policy Instruments under specific Policy Product, in order to facilitate instrument searching. Work in the same way as "My Instrument List"

Functionality: New Policy Transaction

Where: Manual→New Policy Transaction (Advisor Level)

What: New field has been added in first section "Policy Provider".

Functionality: New Policy Transaction

Where: Manual→New Policy Transaction (Advisor Level)→ Setup Investment Breakdown details.

What: Using Policy Search you will be able to have products from "My Policy Instruments Setup" according to Policy Provider and Policy Name

