



## Upload April 14<sup>th</sup> 2009 List of Changes

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### **Functionality: Misc Changes in CRM**

**Where:** CRM→Documents, Personal -> Documents

**What:** The following changes are done in Documents, and are able for customers that use the CRM service:

- 1) If a document/folder is inserted on a client by an advisor/admin, the client is not able to delete the folder/document. Only if the client has inserted this himself the client is able to delete this information.
- 2) It is now possible to sort on the different headings. E.g. when you push on heading Task Label, then you sort on this column.
- 3) When adding a document to a prospect all the documents will follow this person when/if it is made as a client.

