Upload August 20th 2009
List of Changes

Functionality: Client Login Setup

Where: Personal → Client Visibility Setup

What: Gives the ability to the Network Administrator to enable and disable a whole tab or submenus under a specific tab. Those rules are used when the clients are allowed to LOGIN themselves.

On first section Network Administrator has two options:

1. Select **"Whole tab"**. By selecting the Whole tab in section two, Network Administrator can enable or disable tab. The only tab that cannot be disabled are the Portfolio tab.
2. Select **"Selection Tab".** By selecting Selection Tab in second section, Network Administrator can select specific page(s) to hide or show.

Press save button.

Functionality: Change Private Info Setup

Where: Personal → Preferences Setup

What: Network Administrator can set edit options for the client on each field in the menu Change Private Info. Those rules are used when the clients are allowed to LOGIN themselves, in order to change his own information.

Functionality: Document Setup

Where: Personal → Network Main Setup→ Section 4 (CRM Security)

What: Network Administrator has the ability to lock following options that client have regarding folders:

- New

- Edit
- Delete

The Administrator can also set the possibility for the clients to upload documents on his own.

Functionality: Adviser Authorisation

Where: Personal → Adviser Visibility Setup

What: Gives the ability to the Network Administrator to make visible or invisible submenu choices. On the first section Network Administrator has the option to select one of the following:

- Portfolio
- Personal
- Graphs
- Manual

Press save button.

After selecting the tab on second section, Network Administrator has the option to make visible or invisible submenus for the adviser.