



Upload September 30th 2008 List of Changes

Functionality: Attachments

Where: Services → CRM → To-do list

What: Added an "Attachments" column in CRM To-do list, indicating if a task/meeting has attached files.

Functionality: Start Date

Where: Services → CRM → Meetings/Tasks

What: Changed the default start date of a task/meeting, to the client's computer date.

Functionality: Task/Meeting

Where: Services → CRM → Tasks/Meetings

What: Added the ability to insert a new Task/Meeting, without escaping from the Meetings/Tasks page. This allows you to insert multiple Tasks/Meetings sharing the same or similar data for e.g. different Advisors.



= Save task/meeting without closing the window



= Save task/meeting and close window

Functionality: Insert new task in exported list

Where: Services → CRM → Search

What: When doing a word merge or email merge in CRM Search Engine, you're now prompted if you want to insert a new task for every client in the exported list.

Functionality: Quick Jump

Where: Services → FactFind → Select Client

What: The heading names shown in the quick jump is corrected according to the self defined header names in the setup.

