



Upload October 14th 2008

List of Changes

Functionality: DOCUMENTS

Where: CRM → Documents (For Network administrator and Advisor)

What: CRM Documents. User has the ability to easily view documents uploaded in CRM (Tasks/Meetings), FactFind and Compliance

Functionality: Administrator Report

Where: Portfolio tab

What: The Administrator Report has been removed. Please contact support@financecube.net

Functionality: Sorting/Rearrangement/Various

Where: financecube.net

- Rearrangement of Left side menu choices.
- Sorting in various lists and Main Administrator Page.
- Auto Advice – Signal List (only transaction instruments can be selected when adding a signal for specific client).
- Formatted numbers in Main Search Page.

