Upload October 29th – 31 st 2008
List of Changes

Functionality: View/Edit Historical Prices

Where: Manual → Instrument Prices
What: A new function to view and edit historical prices that are connected to the network. It is also possible to export this information to Excel.

Functionality: Attachments

Where: Services → CRM → Task/Appointment
What: In the Task/Appointment page in CRM a column added with paperclip icon which indicates that attachment exist in the task/meeting.

Functionality: Document Storage

- **Where:** Services → CRM → Documents (**Administrator/Adviser**)
  What: An administrator can create/delete/edit folders and upload/remove files. In addition the administrator has the ability to give visibility of folders to advisers and/or clients in the network. The adviser/client can only see the files and folders that administrator has given visibility to.

  The adviser has also the possibility to create/delete/edit folders and upload/remove files. In addition the adviser has the ability to give visibility of folders to clients belonging to him/her.

  Folders can only be edit/deleted by the person that has created the folder.

- **Where:** Services → Documents (**Client**)
  What: The client can see documents attached in the CRM system, which is set as visible for the client, and also folders that administrator and adviser has given visibility to. The clients have also the possibility to create/delete/edit folders and upload/remove files.

Functionality: To Do List

Where: Services → CRM → To Do List
What: This list also shows tasks that are not completed or have not started. It might a task was half way done yesterday or last week, this task will be in the task list until it is completed.

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