



Upload March 31st 2009 List of Changes

Functionality: New Layout

Where: Portfolio → PDF Reports → Market Value Report 2

What: Previous version of the Report has been migrated to a new layout.

Functionality: All clients Selection.

Where: CRM → Tasks/Meetings

What: It is now possible to select all advisors by clicking in the checkbox in the heading of the Select Advisors when inserting a task/meeting.

