

Enhancements contained in Portus Platform release 8.0

1	Reduce response times by rewrite of key screens and data access layer
2	Enable iPad, tablet and smart phone use with responsive screen design
3	Allow 'new money' to be included in the Portfolio rebalance process
4	Revamp client report builder and enhance the layout and appearance of the client report
5	Provide a drill down from the primary fund listing to see invested clients. Currently you have to go to the sub fund listing
6	New multi feature export option on business summary screen
7	When adding non IL protection policies, allow user to specify life assured and type of protection and include this information in the client report
8	Enable Portfolio rebalance to work even if client has no IL policies
9	Use same calculation for percentage assets analysed in Client summary, Client report and Portfolio rebalance
10	Correct the error preventing newly added policies being accessible till the next day
11	Allow partner to control whether client can see Portfolio return, Portfolio risk and Client attitude on the B2C site
12	Add a data export option to the Client Lists resulting from Drill Downs on Business Summary Page
13	Additional assets added using the 'non fund' option should be correctly analysed by asset type
14	On portfolio performance, enhance the cash flow hover to show breakdown of money received in a any given month.
15	On the policy submit screen, display the commission profile code chosen so as to facilitate data quality checking
16	In the report builder make the plan type filter effective for Additional assets as well as IL policies
17	The client refresh button should always reveal any newly added plans
18	Warn users when they log on to B2C if terms and conditions have changed since they last logged on
19	Non fund based additional assets were appearing in client report when they should not
20	Sort on Funds Name Column in the Funds Tab was not working.
21	Advisor fee implement basic solution
22	Terms and Condition Link in Forget Password Page was not working
23	Correct the discrepancy between the portfolio performance grand total and the client summary grand total
24	Client Fund sort not working