

# Aequos Engage Release Note

## Version 2.0.0.1

Issues completed/resolved

### General

No	Description	Benefit
1	Added print and export functions to product type description dialog	Located within the Product Type Selection screen, by clicking on the question mark, users can export or print the product type description
2	Added video links to navigation pane	Links to Defaqto's video help presentations are now accessible when working online – look for the 'Training Video' links above the Help Pane

### Administration

No	Description	Benefit
1	It's now possible to view a summary of the sift template when setting up a new template	Allows you to view included and sifted out products, etc as you are setting up templates using your administrator password
2	Fixed problem setting default fund lists across an entire licence	Preferred funds can now be programmed under your administrator password and be set as defaults across your licence

### Data Downloads

No	Description	Benefit
1	Downloading product type templates	Product templates created using your administrator password can now be successfully downloaded for access when working offline

### Client Details

No	Description	Benefit
1	Added group name to client details	Allows for a Group / Company name to be used as an alternative to an individual name when conducting Group research. This is populated within the Client Details screen
2	Added additional client session details, such as email address, retirement age etc to client details	Allows for greater auto-population of client data when accessing Engage via a CRM as well as allowing users to capture more data within the Client Details screen for the client report

3	When reopening an existing client session any manually added products are correctly re-added to the final product selection now	Manually added products will now appear in any reopened research sessions previously saved
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## Graph Analysis

No	Description	Benefit
1	When exporting the combined analysis graph, the individual issues are also exported within the report	Within the Graph Analysis section the Combined Issues graph now displays the importance levels assigned to the product features when exported
2	Products are now correctly numbered in the export to correspond with their position in the product list	The position of the product from the final analysis will now be displayed in the report when you export it. Improvement to the graphing process
3	Addition of Graph Data Export function	Within the Graph Analysis section you now have the option to Export Data. This will create a Word document consisting of the graph, a breakdown of the DNA scores awarded for each product within the graph as well as a full listing of the DNA criteria applied within the research

## Fund Compare

No	Description	Benefit
1	Sort columns within the fund compare grid are now also correctly applied to the CSV export	When exporting a grid within the Fund Compare section, the export will match exactly the format of the configured and sorted grid on screen
2	Added ability to search the fund grid for specific data items	Users can now search the list of funds for specific provider names e.g. Gartmore, Merrill Lynch, etc using the 'Find Fund' functionality within Fund Compare
3	Added the ability to save grid view configuration between sessions.	This allows users to configure a grid and save that preference so that future Fund Compare sessions include only those specified columns initially. This is located within the 'Save Configured Grid' functionality of the Fund Compare area

## Reports

No	Description	Benefit
1	Limited exporting of all data and brochure cells in report	The maximum data and brochure compare export has been limited to 25 features.
2	Added Intelledox suitability report integration	Enables production of superior suitability reports – contact Defaqto for more information