

Enhancements recently available on Liberty



We have recently released some enhancements on Liberty that are intended to ease navigation. The last round of these will launch on October 18, 2019.

Highlights of these enhancements include:

1. Addition of a “Year to Date” default reporting period for the Performance tab and page views—contact your relationship manager if you want this reflected on Liberty for your account owners to view
2. Ability to export your Bulletins and Security Holders reports to excel and CSV formats
3. Enhancement of the collapsed or expanded model viewing options on the Model/Security table
4. Addition of custom sorting for the status column on the Order Queue that allows selection of the statuses you would like to see first in the table
5. Enhancing the filters on the Transactions page so they are retained as you switch between models and accounts during your session
6. Making the Model Allocations process more efficient by removing the additional step of selecting **Done** when editing models and saving the changes right on the screen

We trust these modifications will enhance your Liberty experience.

Please contact your relationship manager with any questions you have.