

IN TODAY'S NEWSLETTER:

- ▶ KEY DATES
- ▶ UPCOMING FUNCTIONALITY
- ▶ DEVELOPMENT ROADMAP
- ▶ OTHER NEWS

THE Q2 IMiX V21.6 RELEASE WILL BE AVAILABLE FROM JUL 2021

IMiX updates

Key Dates

Cycle Phase	Date
Q3 2021 Development Start	28/06/2021
Q3 2021 Code Freeze	10/09/2021
Q3 2021 Release Close	24/09/2021
ISL Testing Q3 2021 Upgrades	27/09/2021
Q4 2021 Development Start	27/09/2021
Q3 2021 Release Available to Clients From	04/10/2021

Upcoming Functionality

HTML5 Migration – Scheduler Task & Logs: Task & Logs available as separate screens. Some of the new functionality on the Scheduler Logs screen includes:

- A new Error column which provides additional information via the UI relating to why the task has failed
- A navigation shortcut to the Import Exceptions screen

Prospect client data capture: A new Prospect Client screen (driven by a new screen permission) that allows client onboarding teams to manage prospect clients separately to existing clients as part of their CRM processes. The screen is of similar nature to the existing Client Details screen, allowing an Investment Manager to also add Contact Details & Relationship information when adding a prospect too.

Universal search – Master security details and master prices: Once you have searched for a security via the Universal Search, master security details & master prices access is now available via new icons.

Global Roles & Head Company Enhancements: Enhancements to the existing Head Company functionality, which allows users to search, view and edit data across any company when logged in to the Head Office Company. Head Company users can also view all data across all companies on screens including; Unsubmitted Orders, OrderStream & Order Archive. Head Office users with the relevant permissions are also able to create global or company-specific static data/settings for a given company when logged in to the Head Office Company.

Development Roadmap

- HTML5 Migration
 - Performance
 - Fees
- Query Builder
- Group Membership at Multiple Levels
- Group Automation
- Depot Allocation & Order Routing Allocation
- NatWest Integration – Intraday FX Rates
- Risk Monitoring

For additional information on any developments, please contact: IMiXBA@investmentsoftwareltd.com

In other news...

We would like to welcome the following people to the Investment Software team:

- Michael Allen (Junior Analyst/Developer)
- Oliver Aragoni (Junior Business Analyst)
- Hugh Fanthorpe (Junior Analyst/Developer)
- Linda Nwachukwu (Junior Business Analyst)
- Edward Shrubsall (Junior Analyst/Developer)



For all the latest news, don't forget to follow Investment Software on LinkedIn [here](#).

