ClientBuilder 2.1 allows you to take control of your cli and grp creation and maintenance. Use the ClientBuilder Admin Utility to define meaningful descriptions for your custom labels. Declare specific fields as being "required." Specify other fields as "dropdowns," allowing your users to select from among certain pre-defined values for these fields.

ClientBuilder dynamically constructs the "front-end" data entry dialog boxes that allow users to easily create and maintain clients and groups in Axys. End the days of incomplete information. New users get up to speed quickly when they user ClientBuilder.

1

Custom Labels: Having trouble remembering what your custom labels mean? Create text descriptions for your custom labels to make data values easier to understand. The text labels bring significant value by making the custom labels very readable. Create "Allowed Values" for your custom labels using ClientBuilders Dropdown Value editor. The editor allows you to control the values entered into custom labels by defining them as drop downs.

Group Maintenance: Manage your groups in a visual manner. See what groups a client is in. See what clients a group contains. Add and remove portfolio and groups easily in a visual manner.

Data Entry Enforcement: Do you have incomplete client information? With ClientBuilder you can define specific fields as being required. End the days of incomplete information.

2

Other Features:

- Auto load ClientBuilder
- Audit trails featuring previous values
- Required label maintenance check
- Empty group check

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