Standard Solution 1.27

Standard Solution 1.27 provides you with new features and various improvements on existing features. Support for monthly investments and addition of view only roles to report role restrictions.

Monthly investments

Monthly investments can be used to generate recurring buy and sell trade orders. For example investors can specify how much of specific securities they want to buy each month. This is very similar to the monthly savings and monthly withdrawals functionality, with the main difference being that we create buys/sells instead of deposits/withdrawals.

Version 1.27 provides support for generating recurring buy and sell trade orders into portfolios based on a schedule defined in the portfolio details.

To start using the feature, you first need to go to **Tools → Administer → Monthly investments** to configure the process with the following selections.

To generate monthly investment or divestment trade orders into client portfolios, you need to define the schedule in each of the portfolios. To do this:

1. Open the **Portfolio** window, **Monthly investments/divestments** tab.
2. Select the **Monthly investments** or **Monthly divestments** subtab, depending on if you wish to create recurring trade orders to buy more securities or sell existing positions.
3. Choose **Enable monthly divestments in portfolio currency** or **Enable monthly investments in portfolio currency** depending on which tab you selected in the previous step.

Once you filled in the details on the portfolios, you can run monthly investments from the **Portfolios** view. Search for the relevant portfolios and choose **Create → Create monthly investments.**
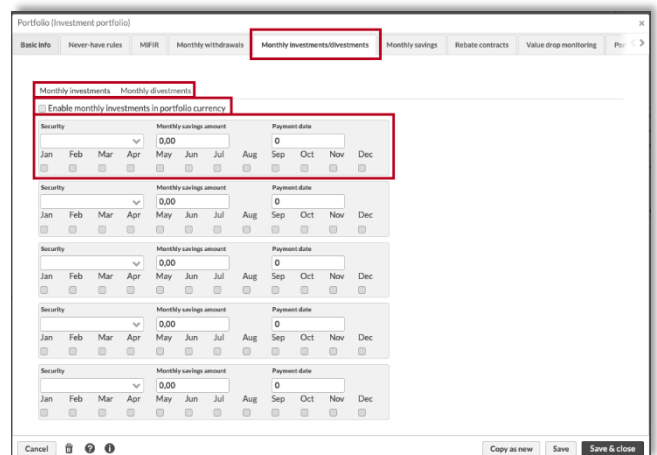
Addition of view only roles to report role restrictions

In the previous version of Standard Solution, we introduced restricting reports to certain user roles. For example, only users with Tax report role (REP_TAXSE) can see Swedish tax reports in the report window (**New → New report).**

Version 1.27 provides support for associated "view only" roles to also see the reports. For example, Portfolio Management role (PM_PM**)** can see reports restricted to that specific role, but now also the "view only" role (PM_VIE) associated to Portfolio Management role can see the reports.