

As part of the Review Card Improvements we have renamed “Take On Date” to “Contract Start Date”. This change impacted the following:

1. Statement settings

- a. Account Details -> Change “Show take-on date” to “Show contract start date”
 - i. System -> Products -> Statement defaults
 - ii. System -> Statement defaults (Individual & Combined)

2. Document templates

- a. Change {takeOnDate} to {contractStartDate} in the following document templates
 - i. System -> Products -> Document templates
 - 1. Welcome Letter Template
 - a. Main template -till have {takeOnDate} - Take on date
 - 2. Policy Document
 - a. Payment Template
 - i. Completed Investment Receipt Template

3. Review Letter Template

- a. Main template
 - i. Change {takeOnDate} to {contractStartDate}
 - ii. Change {reviewBalanceDate} to {balanceDateForReviewLetter}
 - iii. Change {marketValueAtReviewBalanceDate} to {marketValueAtBalanceDateForReviewLetter}

4. Export Transaction Data Job (Amazon S3 Bucket or Azure Blob Storage)

- a. Contract Table
 - i. Change “takeOnDate” to “contractStartDate”

5. Application Program Interface (API)

- a. Model Manager
 - i. /api/modelmanager/investors?date
 - 1. “Take On Date” deprecated and replaced with “Contract Start Date”

6. Import and Export

- a. Investors -> Export Contracts & Investors -> Import Contracts
 - i. Change “Take On Date” to “Contract Start Date”

- ii. New field "Anniversary Date"

7. UI Fields

- a. Contract summary card and details view
 - i. Change "Take on date" to "Contract start date"
 - ii. New field "Anniversary date"
- b. Contract -> Active instructions -> More actions -> Create default instructions
 - i. Rename: "Account take on date" to "Contract start date"
- c. Add "Anniversary date" to Contract details (Initialised to "Contract Start Date")