

Trestle[™] 5.12 Release Notes

Feb 3, 2021

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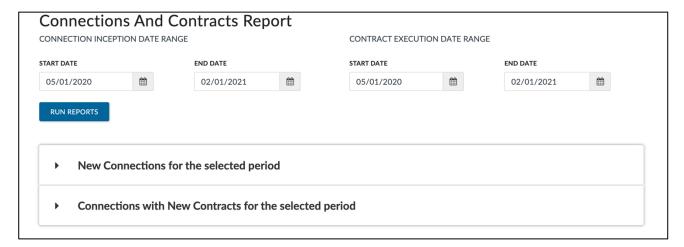
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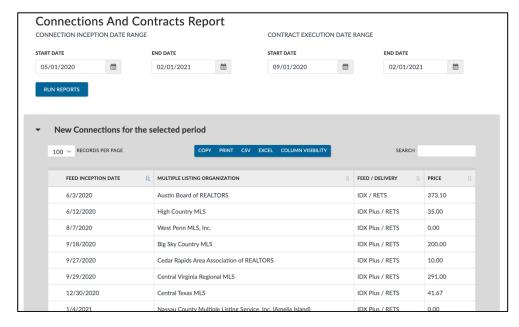
Dashboard

Technology Provider: Connections and Contracts Report

In response to your requests for centralized, downloadable visibility of the connections and contracts across all MLOs, this release contains the new Connections and Contracts Report. It enables you to query for connections by inception data and contracts by execution date.



The report loads with the last calendar month selected. You can update the date range you're interested in and click "RUN REPORTS". The reports will each include the connections and contracts appropriate to the entered time ranges.



The reports contain the fields relevant to a connection and/or contract, which can be individually activated in the "COLUMN VISIBILITY" button. The contents of this report can be downloaded in a variety of formats using the buttons at the top of each report.

Your Feedback Wanted

We're eager to hear your thoughts about this release. Your feedback is a key factor in setting product priorities, so hearing from you is very important to us!

Feel free to reach out at any time with feature requests, bug reports, or any other idea that would make your business more productive or easier to operate!



Your contact for feedback on Trestle is:

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Thank you!