**SS&C** | **EZE**

Eze Eclipse

# 2020 Q1

New Feature Highlights

**SS&C | EZE**

## We're here with you, come rain or shine.

This year may have come roaring in with many challenges, but we're working to help you weather the storm by delivering new features and enhancements to keep you informed and nimble in these turbulent times.

You can look forward to rebalancing your portfolios with ease in our new **Modeling component**, keep tabs on reconciliation processes and enjoy some nice changes to trading and compliance functionality.
Hold on to your hats, and let's take a look.

## Explore the new features in Eze Eclipse.

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# Advance.
## What you need to move forward.

# Keep Your Balance

**We've introduced new Modeling functionality, so that you can quickly rebalance your portfolios as needed.**

When the markets move, you need to be able to whip your portfolios back into shape on the fly. We've introduced expanded modeling functionality that allows you to do just that. You can use the new Modeling component in Eze Eclipse to run rebalance models on your portfolios and create orders to get you back to where you want to be.

Reach out to your SS&C Eze client support representative to learn more about getting the Modeling component in your system and keep an eye out for more modeling functionality to come!

# Trading Tips and Tricks

**There are a few new features that will help you as you work with orders in Trading.**

Want to flip an order from limit to market or vice versa from right in the order Blotter? Now you can. Just start editing an order on the Blotter, then set the LimitPrc to 0 (to switch a limit order to a market order) or enter a new limit price (to switch from market to limit).

We've also added the ability to assign a second strategy value for orders you enter in the FX order ticket. Just look for the Strategy2 field and select your values there.

# Account for Cash in Compliance

**Cash in on one of our newest features by including cash positions in your compliance checks.**

When creating a new rule in the Compliance rule editor, you can now select the Include Cash Positions option, so the rule accounts for your cash positions.

We also introduced another way to bring cash into your compliance rules. PortCash% and PortCashMktVal(V) are now available for use in rules. For example, you can use those fields to create a rule that compares your proposed trade against your cash and prevents you from running into a potential overdraft situation.

# New and Noteworthy

**Take note! It's easier to keep tabs on your reconciliation processes in Eclipse.**

We've made keeping track of your process for investigating and resolving reconciliation issues a breeze by allowing you to keep all your notes right in the Reconciliation tab. You and everyone at your firm can view and enter comments in the new Annotation Details blade of Operations.



You can also filter annotations and see just the most recent updates for a record.

# Smarter Selecting

**What's the bottom line?**
**Compliance check configuration just got easier.**

In the past, you had to manually configure which columns appeared in the rule editor. Now the rule editor handles all the work for you. Whenever you open the Compliance rule editor, all the relevant fields are available, automatically.

Just another way the Eclipse team is working to make your work in Eclipse faster and more efficient!

# Moving Right Along

As we head into the second quarter of the year, we'll keep rolling out the new features that support you and keep you doing what you do best.

To learn more about the whole system, go to the Eclipse Help (F1). You can also take tours of newly released features and functionality right in Eclipse. Just click on the **Walk Me Through** menu icon and select a topic to explore.

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# Advance.