



## ADVISER FUNCTIONALITY: APPLICATION MANAGEMENT

### MANAGE AND KEEP TRACK OF APPS FROM INITIATION TO COMPLETION

The integration with our sourcing partners extends fully into the Applications area, providing an end-to-end process for the User and again reducing the need for the re-keying of data. In addition the Application Management module allows for full tracking of applications throughout the set stages required. The flexible grid control allowing the applications to be sorted and grouped by column is also included within this module giving greater flexibility to the end user for example grouping on lender and dealing with all applications for one lender in one call. This screen also uses the underlying workflow heavily to enable auto generation of tasks and emails to keep all relevant parties involved updated on the progress of the application process. If required a central administration team at network level can manage all the applications for any selected companies:

22/05/2009 11:19:00	Mortgage		UAV009 Residential Standard Variable Rate (required)		UAV009 Residential Standard Variable Rate (required)	£130,000.00 £788.02	Action ▶	Miss Jennifer Swap Application Address:	Com
22/05/2009 10:46:00	Mortgage		4.29% Tracker for 2 years		4.29% Tracker for 2 years	£120,000.00 £875.00	Action ▶	Mr Graham Frame Application Address:	Sta
18/05/2009 15:20:00	Buildings and Contents		Barclays Cover Plus		Barclays Cover Plus	£99.00 Monthly	Action ▶	Mr Peter Jennings & Miss Melanie Jennings Application Address: 12 High Street	Com

### From the Application Management screen the User can:

- Progress the application through the set workflow statuses
- Access the lender intermediary site through the lender logo link
- Display applications across the whole network, company or individual users
- View the Application Detail screen which contains the following portals:
  - » Notes
  - » Associated Applications
  - » Associated Tasks – Auto created
  - » Application History
  - » Status Progression
- View 3rd Parties attached to this case
- Add/Amend Fee information (auto populated from Trigold)
- Add application data such as verification information
- View all application events via the audit tab
- View all application notes via the notes tab



### Key Benefits

- Map Workflow Events to your Business Processes
- Perform Detailed Searches Across all Product Types
- Provide your Advisors with 'Finger Tip' access to the following Application Tools;
  - » Fee & Commission Management
  - » Third Party Management
  - » Online Sourcing Tool Application
  - » Full Application Audit History
  - » Document Management

### Key Features

- Comprehensive Basic & Advanced Search
- Quick Access to all Application Areas
- Comprehensive Product Filtering & Grouping
- Customisable Application Workflow Process
- Incoming & Outgoing Fee Management
- Application Third Party Management
- Customizable Portal Dashboard