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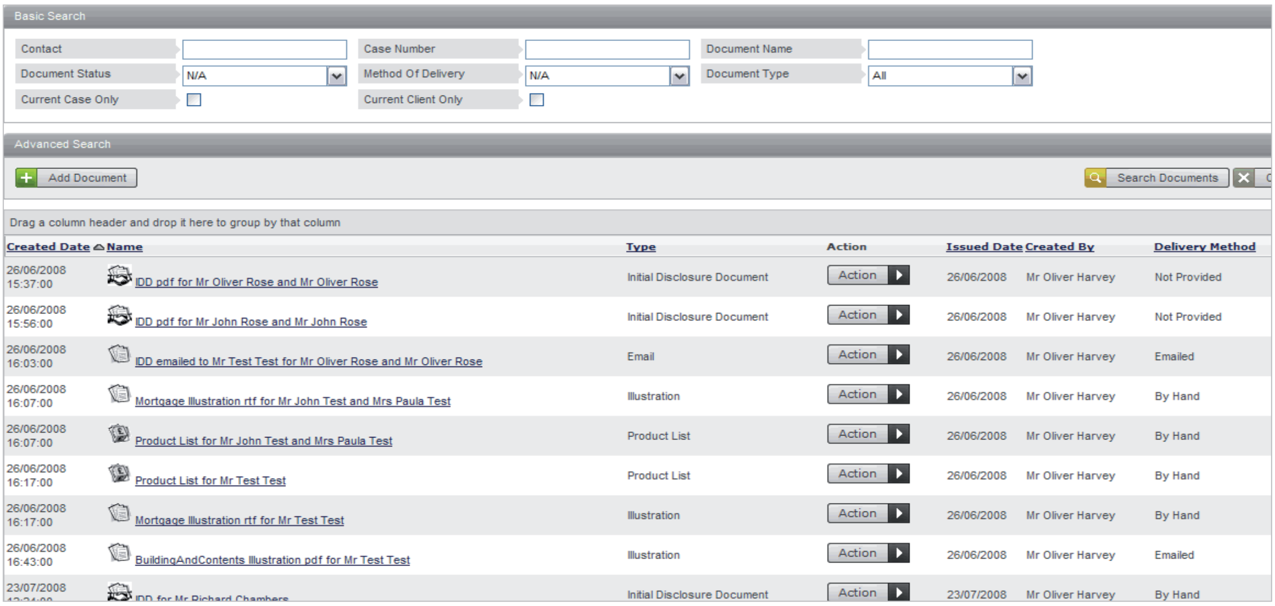
trigoldcrystal

ADVISER FUNCTIONALITY: DOCUMENT MANAGEMENT

DOCUMENT MANAGEMENT, ONE STEP NEARER TO THE PAPERLESS OFFICE

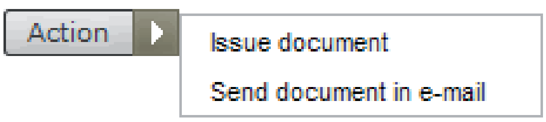
The Document log provides access to all of the documents that have been generated during the course of a financial review. The Adviser may also attach documents that have been obtained from other sources e.g. a provider's website and email any of the documents direct to the client.

The documents can be viewed across the whole client base or on a per client basis. CRM's flexible grid control allows the user to sort and group the documents as required and ensure all required letters are issued.



Created Date	Name	Type	Action	Issued Date	Created By	Delivery Method
26/06/2008 15:37:00	IDD pdf for Mr Oliver Rose and Mr Oliver Rose	Initial Disclosure Document	Action	26/06/2008	Mr Oliver Harvey	Not Provided
26/06/2008 15:56:00	IDD pdf for Mr John Rose and Mr John Rose	Initial Disclosure Document	Action	26/06/2008	Mr Oliver Harvey	Not Provided
26/06/2008 16:03:00	IDD emailed to Mr Test Test for Mr Oliver Rose and Mr Oliver Rose	Email	Action	26/06/2008	Mr Oliver Harvey	Emailed
26/06/2008 16:07:00	Mortgage Illustration rtf for Mr John Test and Mrs Paula Test	Illustration	Action	26/06/2008	Mr Oliver Harvey	By Hand
26/06/2008 16:07:00	Product List for Mr John Test and Mrs Paula Test	Product List	Action	26/06/2008	Mr Oliver Harvey	By Hand
26/06/2008 16:17:00	Product List for Mr Test Test	Product List	Action	26/06/2008	Mr Oliver Harvey	By Hand
26/06/2008 16:17:00	Mortgage Illustration rtf for Mr Test Test	Illustration	Action	26/06/2008	Mr Oliver Harvey	By Hand
26/06/2008 16:43:00	BuildingAndContents Illustration pdf for Mr Test Test	Illustration	Action	26/06/2008	Mr Oliver Harvey	Emailed
23/07/2008	IDD for Mr Richard Chambers	Initial Disclosure Document	Action	23/07/2008	Mr Oliver Harvey	By Hand

The action menu is now also available on the document management screen. This enables a User to easily email the document to the customer or record that the document has been issued. All documents can easily be reviewed by compliance without the need for printing and paper waste.



Key Benefits

- All docs related to the case stored in one place
- All correspondence including system generated emails also stored
- Ability to email any document
- Manually attach documents
- No need to fax documents to compliance
- Compliance process brought forward, therefore quicker resolution and commission payments
- Basic and Advanced search