



ADVISER FUNCTIONALITY: SALES MANAGEMENT

PROVIDING PROFIT AND INCOME TOTALS AND NEW OPPORTUNITY DATES

This module provides a view to the user of all the products sold. All products which reach the completed stage within application management will be displayed within this module.

Together with the product details fee information is also displayed as a column. This gives a breakdown of income, expenditure and profit for each individual product sold. This information is then totaled at the bottom of the results allowing the user to view instant management information. The hierarchy control allows company managers to view all products sold across all advisers within the company.

Powerful filtering allows this information to be filtered against different products and different periods. In addition it can also be filtered by 'fee analysis' which allows the information for 'Paid Only', 'Expected Only' and 'Expected and Paid'.

Sales Management - Jaguar Bromsgrove Branch 115 - Mr Oliver Harvey

Basic Search
Advanced Search

Search Applications Clear Search

Drag a column header and drop it here to group by that column

| Completion Date | Type | Provider | Amount | Fee Analysis | Opportunity Date | Action | Applicant(s) | Status |
|-----------------|----------|------------|---|--|---|--------|---|-----------|
| 18/12/2008 | Mortgage | Nationwide | Amount: £110,000.00 Premium: £636.98 | Income: £440.00 Expenditure: £0.00 Profit: £440.00 | Redemption: 01/12/2041 ERP End: 18/02/2011 Initial Rate End: 01/12/2010 | Action | Mr George French & Mrs Anne French Application Address: 27 Glebecoole Avenue | Completed |
| 18/12/2008 | Mortgage | Nationwide | Amount: £89,950.00 Premium: £485.19 | Income: £359.80 Expenditure: £0.00 Profit: £359.80 | Redemption: 01/12/2025 ERP End: 18/02/2011 Initial Rate End: 01/12/2010 | Action | Mr Oliver Reeves Application Address: 19 The Glade | Completed |
| 18/12/2008 | Mortgage | Abbey | Amount: £82,000.00 Premium: £521.63 | Income: £295.20 Expenditure: £0.00 Profit: £295.20 | Redemption: 01/12/2033 ERP End: 18/03/2011 Initial Rate End: 02/12/2010 | Action | Mr Stephen Curtis & Mrs Emma Curtis Application Address: | Completed |
| 13/11/2008 | Mortgage | HALIFAX | Amount: £206,955.00 Premium: £1,549.23 | Income: £662.26 | Redemption: 01/11/2028 | | Mr Stephen Murray & Mrs Grace Murray | |
| 18/12/2008 | Mortgage | HALIFAX | Amount: £65,000.00 Premium: £313.30 | Income: £208.00 | Redemption: 01/11/2033 | | | |
| 13/11/2008 | Mortgage | Abbey | Amount: £100,000.00 Premium: £494.98 | Income: £350.00 | Redemption: 01/11/2033 | | | |
| 23/09/2008 | Mortgage | Nationwide | Amount: £27,700.00 Premium: £191.62 | Income: £200.00 | Redemption: 01/10/2031 | | | |
| Page Total | | | Income: £2,515.26 | Expenditure: £0.00 | Profit: £2,515.26 | | | |
| Grand Total | | | £4,294.01 | £1,020.00 | £3,274.01 | | | |

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Opportunity dates provide the user with information regarding future sales opportunities within these products. For example for Mortgage Products the following Opportunity Dates are captured:

- Redemption Date
- Early Repayment End Date
- Initial Rate End

All the opportunity dates can also be filtered enabling, for example, a user to display all the products where the initial rate end is due in the next 3 months. These clients can then be targeted with the use of the email functionality to gain a new review and advise on the best options for new products.

Further advanced filtering allows the user to display the product loan purpose, so for example all products sold for dept consolidation purpose can be filtered. This provides valuable management information to company managers and compliance officers.

Basic Search

| | | | |
|--|---|--|--|
| <input type="checkbox"/> Current Case Only | <input type="text" value="Name"/> | <input type="text" value="Product Type"/> | <input type="text" value="Mortgage"/> |
| <input type="checkbox"/> Applications in Progress Only | <input type="text" value="Case Number"/> | <input type="text" value="Product Description"/> | <input type="text" value=""/> |
| <input checked="" type="checkbox"/> Include Expired? | <input type="text" value="Product Provider"/> | <input type="text" value="Status"/> | <input type="text" value="Completed"/> |
| Fee Analysis | <input type="text" value="Paid Only"/> | ? | |

Advanced Search

| | | | |
|------------------------------------|----------------------------------|---|----------------------------------|
| Application Date | Initial Rate Expires | Address (Any Part) | On Panel? |
| Period | <input type="text" value=""/> | Postcode | Client Cancellation Reason |
| From <input type="text" value=""/> | To <input type="text" value=""/> | Amount <input type="text" value="0"/> | Loan Purpose |
| | | <input type="text" value="All"/> | <input type="text" value="All"/> |
| | | <input type="text" value="Debt Consolidation"/> | <input type="text" value=""/> |

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Key Benefits

- Income, expenditure and profit totals
- Fee analysis on paid and expected
- Filter by loan purpose (see options below)
- Filter by opportunity date, early repayment period, redemption period and renewal dates.
- Filter on buy to let or lifetime mortgages