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## Overview of new features added in 2008

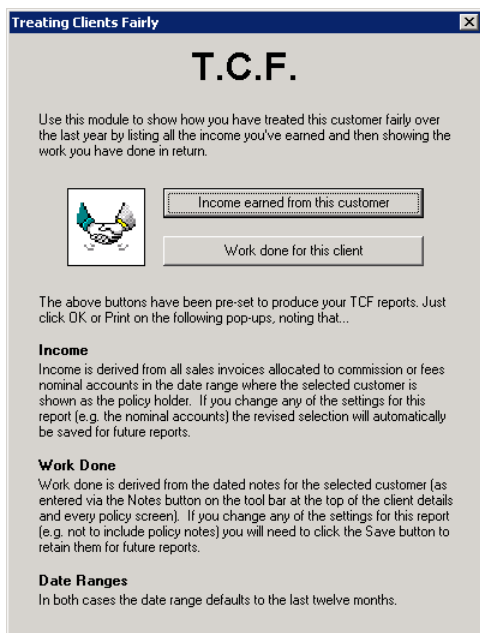
Since January 2008 we've added many new features and services, including : new look menu screens; user-definable fact finds; a new Durell fact find designed by our User Group; a SimplyBiz fact find, a mortgage fact find, a link to Trigold Prospector, a TCF Module, RMAR templates, contract enquiry with three additional companies (Selestia, Standard Life and Clerical Medical) a link to Outlook for the easy attachment of emails to client records, a web-link facility, web-based motor and household quotes, and our website design service.

We hope these improvements will benefit our users, and we intend to continue this pace of development throughout 2009. If you would like advice or further information regarding any of the features above, please call us on 01823 326324.

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## New TCF module released



In Version 5.19 of Durell we included a new TCF button on the client record. This allows shows how you've treated an individual client fairly over the last twelve months by listing all the income you've received in relation to the work you've done for them.

We're currently adding a complaints section to this TCF module, whereby you will also be able to view all complaints received from the selected client in the last twelve months. We hope that by providing easy and clear access to this you'll have relevant information to help prove you are satisfying the necessary requirements.

As we are always striving to improve our software, we would appreciate any feedback about this TCF module, i.e. if it is easy to use, or if there is any other information you would like to be shown.

*"Durell's new TCF module can show what an IFA has earned from each client during the last year, what work he has done in return, and what complaints (if any) have been received."*

Robert White  
Managing Director

## ParaPlanning Online

We have recently teamed up with ParaPlanning Online to offer all supported Durell clients an intuitive and user-friendly Suitability Report writing solution for an extra £50+VAT per month. Their system uses 'wizard' technology and carefully targeted questions to ensure it's quick and easy to use, and most importantly the resultant report is compliant. Moreover, on purchasing a licence you will also be allocated your own Admin Centre, which will allow you to tailor all of your reports to fit your own personal requirements and house style. For more information, please call John at ParaPlanning on 0845 055 3278.

## Group training sessions

In the next couple of months we shall be holding group training sessions in various locations around the country. These sessions are a great opportunity to have a day of training on your Durell system and meet other Durell users for just £75+VAT (including lunch!). All the topics to be covered are chosen by those attending so that you get the best and most relevant training. There are still a few places available for the following locations:

- Gatwick/Crawley, Thursday 5<sup>th</sup> February
- Enfield, Wednesday 18<sup>th</sup> February for Financial Adviser users, Thursday 19<sup>th</sup> February for General Broker users
- Birmingham, Solihull Wednesday 25<sup>th</sup> February
- Sheffield, date in March to be confirmed

If you would like to attend any of these sessions, or would like further information, please call us on 01823 326324. Please note that any remaining places will be allocated on a first come first serve basis.

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*"Previous clients attending these sessions have found them to be of great benefit at a very competitive price, plus it gives an opportunity to discuss ideas with other clients of Durell"*

Iain Waugh,  
Operations Manager

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## New Durell and SimplyBiz fact finds

We have recently released two new fact finds. One was independently designed by the Durell User Group and has now replaced our Standard fact find. The other is a SimplyBiz fact find for supported Durell users who are also members of that network. If you would like further information about using these fact finds please contact us on 01823 326324.

## Link to Canada Life now live

We are pleased to announce that the link to Canada Life for online contract enquiry is now live. Online contract enquiry provides an instant, hassle-free way to update investments, eliminating tedious phone calls and saving valuable time. If you require training on contract enquiry please contact Katie at Durell on 01823 326324 to book an online session with one of our advisers, charged at £55+VAT per hour.

Durell currently provides contract enquiry with a total of 15 investment companies, including: Canada Life, Clerical Medical, Cofunds, Fidelity, Friends Provident, Funds Network, Norwich Union, Prudential, Scottish Equitable, Selestia, Skandia, Standard Life, The Hartford, Transact, Zurich. We hope to add Axa and others in the near future.

## DON'T FORGET...

Durell's support desk is manned from 9am until 5pm, from Monday to Friday. Our experienced and knowledgeable staff are happy to help, so please call on 01823 334142. Please remember the best way to contact support is by telephone rather than email.

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Please note if purchasing equipment or services to make cheques payable to Durell Software Ltd.

## Durell's move to new offices

On approximately March 25th this year we will be moving offices. We wanted to make our users aware of this at the earliest opportunity but we will be sending information with the exact date and new contact details nearer the time. We can reassure all users that despite this move we are not expecting any break in our service to you.

## Durell's concerns

Following recent problems experienced by clients, Operations Manager Iain Waugh is concerned that some users may not be protecting their data correctly. We strongly recommend the following:

- **Daily compact and repair (maintaining) of database.** This should be scheduled on your server. Please refer to the Help in Durell: System Maintenance and Backup, and then Compact and Copy, or call Support on 01823 334142.
- **Daily full back up of data** (inclusive of documents, scans and other programmes). You should back up to a tape or external drive on a daily basis, and in addition keep weekly copies for each Friday for a month. Your weekly backups should be kept off site. For further information contact Iain on 01823 326324.
- **Or switch to Durell's new on-line service.** It's more expensive (85+VAT per month per user) but at least you won't have to worry about anti-virus, disaster recovery or back-ups because we'll do it all for you.