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"It's great to be able to give our users something that can increase their selling time while also helping the planet"

Robert White,
Managing Director,
Durell Software

Recent program updates

Since the beginning of the year we have added the following improvements:

- Online enquiry with Selestia (we now link with 12 companies)
- New customisable fact find system
- Additional valuation report
- A secure web-link facility
- Additional mailshot fields can now be printed as part of client information
- While a client record is on your website a 'world' icon is displayed next to its 'Search name'
- The Percentage of Business report for General Insurance now shows premium as well as commission
- An improved Monthly Instalment report for General Insurance

All improvements from 2005 can be viewed on our website under the 'Updates' tab. We recommend you view these regularly in order to get the best out of your Durell system.

New customisable fact find

Our new customisable fact find system has just been released and is available free of charge to all supported users. The benefits are:

- Entire layout is customisable (i.e. questions, sequence, totals and style)
- Re-designed layouts are immediately printable
- Fact finds may include coloured logos and pictures
- Durell also offers a layout design service for busy IFAs and networks (cost subject to a final quote)

For just an extra £250+vat, plus £25+vat per month:

- Fact finds, investments and other details can be displayed via your website
- So clients may enter or amend details directly via the Internet
- Green initiative to reduce fact finding trips (and increase selling days)
- A secure server and web space are provided within this cost

Durell provides a ready-made example set-up, which you can customise by editing the questions, their order, the headings, totals, fonts, and other stylistic aspects. A preview facility enables you to check the appearance, and all such new layouts can be printed immediately using exactly the same fonts and colours. So a fact find can be designed to exactly match your existing house style, ensuring consistency.

The optional web link facility enables your clients to access their details by logging on via your website, where they can enter or amend their personal details (in addition to viewing their investment portfolio). Changes are automatically downloaded to the Durell database. Needless to say, this is done from a secure Internet server with a secure downloading routine, all provided within the price. Reducing the number of fact finding visits to your customers will save time, and allow you to promote your green credentials, as it both saves paper and eliminates excess travelling.

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Robert White, Managing Director of Durell Software says, 'It's great to be able to give our users something that can increase their selling time while also helping the planet'.

HAVE YOU TRANSFERRED TO THE NEW FACT FIND YET? If not please go to the Setup menu and select Fact Find. Please ensure you have backed-up your data before proceeding, then simply choose the option to proceed. We recommend you do this process overnight as it takes a while to complete. If you require any assistance please call our support team on 01823 334142. The fact find design service is offered at a cost to be agreed through consultation. If you are interested in this service please email katie@durell.co.uk or call us on 01823 326324.

"All of our training options are tailored to your needs and are competitively priced."

Online training proves popular

We have noticed an increase in the number of users choosing to have online training. This method is ideal for smaller companies or as a top-up to on-site training days, and is carried out by one of our experienced staff linking directly to your computer. On-line training is just £50+vat per hour, and you don't have to worry about sticking to your allotted time, as you're only charged for the time taken, whether this is more or less than originally booked. If on-line training isn't for you, it may be worth considering our other options:

- Training at your offices: This is offered to any number of attendees and is for a full day from 9am until 5pm. This is charged at the competitive rate of £600+vat, which includes for all disbursements.
- Training at our offices in Taunton: This is for a maximum of four attendees and can either be a full day from 9am until 5pm, or a half day as a four hour session. The full day is charged at £400+vat, and the half day at £225+vat. The start and finish times of the half day session are chosen by you.

Whilst training is not mandatory we do strongly recommend it in order for you to get the best out of your Durell system. Whichever option you choose we will provide CPD certificates following the course. We also hold occasional group training sessions on specific topics around the country, so look out for the next one! If you would like to discuss your individual training needs please contact our Operations Manager, Iain Waugh on 01823 326324, or by email to iain@durell.co.uk.

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.

If you would like further information about the articles in this newsletter please contact us on 01823 326324.

New motor & household quotes

We're currently developing a web-based quote system for motor and household insurance. This will allow prospective clients to get quotes direct from your website, which will automatically be downloaded to appear in your Durell database the next day. This will make your business available to anybody with access to the Internet, whether they're an existing client or not.

If you're interested in this new system please email katie@durell.co.uk.

Dan Sands joins Durell

Our latest team member, Dan Sands, has just joined us to assist with support and more excitingly, with website design. This may be of special interest to clients who wish to use our new web-link, or those who'd like a new or improved website. Initial consultation is free, and thereafter a fixed cost will be given for the work required. If this is of interest please send an email to katie@durell.co.uk, or call 01823 326324.