Newsletter - What's New

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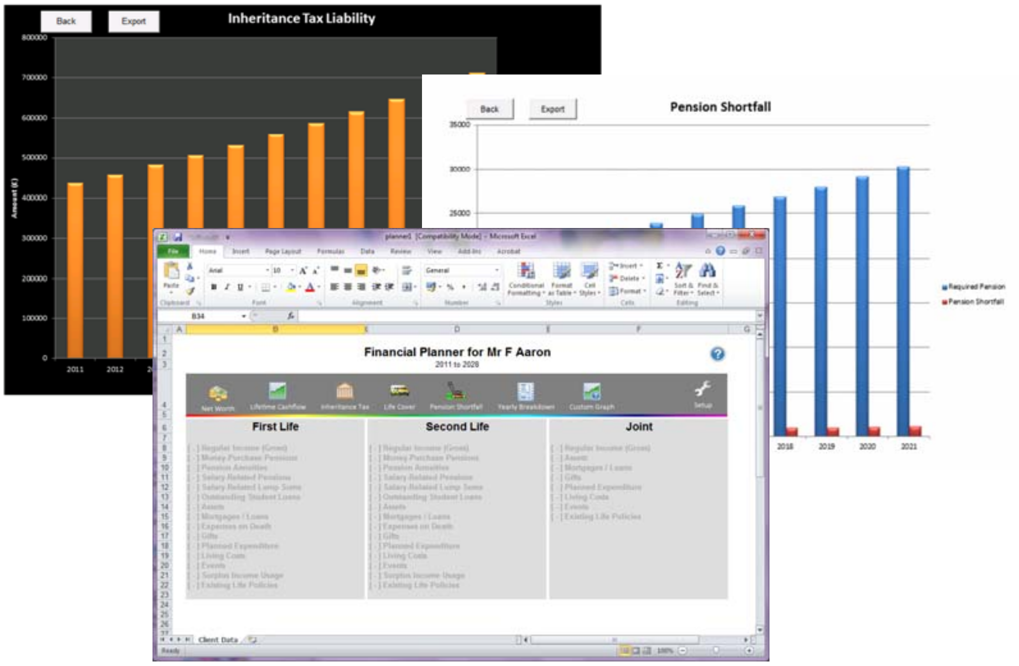
"The three key points of the RDR - now just months away - are to cut costs, manage fees & VAT, and offer a tangibly valuable service. Durell's new planners address this third issue by giving advisers an exciting new tool to really impress their clients."

Robert White,
Managing Director

New Planners now fully released



We are delighted to announce that our new planners have reached the end of the Beta testing phase and will be available to all users from revision 6-6-00 onwards. If you advise on Lifetime Cashflow, Net Worth, Pension Shortfall, Life Cover and Inheritance Tax the new planners will enable you to analyse your client's financial position better. The planners use the information direct from the client's associated fact find and are generated in an Excel spread sheet which can be saved or edited to suit your client's requirements. Instructions, help and example plans are available now on http://www.durell.co.uk/OnlineManual/ in "Financial Planners (New)".

Commercial screens improvements

Many new commercial insurance screens have been added, existing ones improved, and on certain screens you can even setup standard prompts specifically for your business, preventing unnecessary rekeying and saving time.

Important help re contract enquiry with Friends Life and Ascentric

To start using the contract enquiry service with Friends Life (previously Axa) you will need to complete their online form, so please contact us for the link if you are interested. Likewise existing users of Friends Life's contract enquiry service who are receiving the error 'Initiator not allowed' will also have to complete this online form.

If you are planning to use Ascentric for online contract enquiry you will also need to contact us first to start the registration process.

"Technology can be a great facilitator and in today's market it is essential. So we urge all advisers to participate in our training sessions and seek advice as to how to maximise its utilisation"

Iain Waugh,
Operations Manager

Need technical support?

Durell's support desk is manned from 9am to 5pm from Monday to Friday, where our staff are available on 01823 334142.

If you subscribe to our 'Support and Updates' service the quickest way to receive help for technical support queries is by phoning the above number.

To ensure fairness with regard to call priority we run a voicemail service which also ensures the most appropriate member of our team can take your call and in turn offer the most help with your issue.

Free group training sessions - more dates announced

Following the success of our latest group training sessions we have booked three more for the rest of the year. The next set of free monthly group training sessions, held in our office, are as follows:

14th September 2011 (for Financial Adviser users): To cover: New Planners, Fees and the Fee Timers, Invoicing, Contract Enquiry (new more efficient process and inc. new FinExpress link), Diary and Memos (inc. diary and client notes reporting)

12th October 2011 (for General Broker users): To cover: Insurecom integration for quotes, Commercial Screens, Claims and Claims Reporting, General Accounts (inc. Posting, Reconciliation, Client and Insurer Accounts, Commission Transfer, RMAR and Accounts Reports)

16th November 2011 (for all users): To cover: Client Management and Marketing (inc. categorising clients, mailshots, client reviews, spread sheets, user-definable reports), Web-link as a way to offer a value added service, Management Reports, TCF Reporting, Complaints, System Maintenance (inc. back up procedures and compact and repair)

Although there won't be a session in December, sessions will resume in January. Sessions run from 10.30am until 3.30pm and include lunch. There are a maximum of 8 places available at each session that will be allocated on a first come, first serve basis. Unfortunately, due to popular demand, we can only allow a maximum of 2 people per company at each session.

Extended Web-link offer

In April we ran a Web-link offer whereby we waived the £250+VAT upfront setup cost and it proved to be popular. We're pleased to announce that we'll run the same offer again in August.

So for every order we receive before the end of August we will waive the £250+VAT upfront setup cost. The monthly cost will remain the same at £27.50+VAT. We believe the Web-link is the future of Client Facing Services and will enable you to offer a real value-added service to your clients. Once we have checked your hardware and Internet specifications the Web-link can be setup in just 3-5 working days. To view a demo of the Web-link please go to www.durell.co.uk/weblink.asp and click on one of the three 'View Live Demonstration' buttons that best suits your business.

Back-up and system maintenance concerns

Following a recent group training session, several of you have come forward with your back-up concerns. For this reason we should like to reiterate the importance of a disaster recovery plan. If your business will not be able to function if your data is lost in a disaster (e.g. fire, flood, theft) then a regular back-up and maintenance procedure is vital.

Regular system data back-ups are essential and we recommend taking a back-up for each day and storing it off site. In addition a compact and repair routine should be run regularly so your data does not become corrupted. If you are using our online server we take care of all these issues for you, plus look after your Antivirus. For more information please contact us.

Forthcoming services audit

Recently we have noticed there has been an increasing number of calls to the Durell support desk about technical queries not relating to our software, and therefore not covered in the support and updates agreement. Because of this we have decided to conduct a services audit which will clarify which services you would like us to provide and which you will take care of yourself. This should help us to offer the best service possible to you and could also help you to implement a reliable Disaster Recovery Plan.

The audit will be carried out over the next few months, when our Client Care provider, Ben England, will call you to discuss your existing support contract and our other services.