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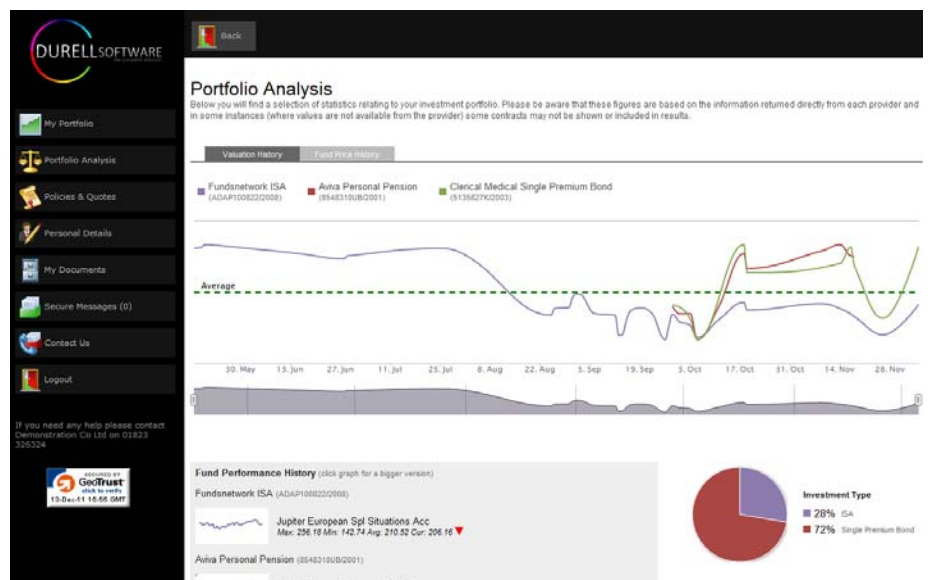
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"The new Portfolio Analysis tool in Durell Client Facing Services must surely make this one of the strongest offering on the market. It certainly got a good review from Ian McKenna in the Nov 14th edition of Money Marketing."

Robert White,
Managing Director
(re article entitled "Durell Delivers")

Web-link now includes portfolio analysis tools

The Web-link (for Client Facing Services) has recently been updated to include investment portfolio analysis tools for more in-depth examination. We have added a valuation history which shows in a graph format the performance history of the contracts, based on valuation requests performed via the Web-link. A slider at the bottom of the graph allows the user to focus on specific time periods. We have also added a fund analysis tool which displays each fund's price history individually, using data from FinExpress. There are also pie charts showing the overall portfolio allocation by type, sector and risk.



Policy add-ons (available now for testing)

Many general insurance policies have standard "add-on" policies for associated legal expenses or uninsured loss recovery. Rather than having to enter these manually each time, the new add-on facility now allows them to be created (and then posted to the accounts) automatically with the base policy. You can create as many templates for add-ons as you like, which you do via the existing Standard Answers facility in Durell, where you can already set-up default wording and standard premium details for each product type. The only difference is that you also "tick" the ones you want to make available as add-ons. This feature will be in the next official system release, but if you can't wait till then just phone the Help Desk to be shown how to download it.

Enhanced portfolio valuation reports released

The valuation reports have been improved to show a more detailed breakdown for better analysis. The **basic** valuation report (best for use with contract enquiry where fund details are deleted and replaced) now shows the total amount invested and the growth. In addition you can now choose to add the yield to the standard and basic valuation reports, either as a separate item, or in addition to the growth.

"The new Complete Policy Register is so easy to use now, and the results should really please your clients. Every document you pass to a client is an opportunity to impress that shouldn't be wasted."

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.

Christmas opening times

We will be closed for Christmas from 24th December to 2nd January (inclusive). If during this time you have an urgent technical problem please call 0781 0753 732 for help.

Free group training sessions - more dates announced

Our free group training sessions are still very popular and we are pleased to announce four more have booked for the start of next year. The next set of free monthly group training sessions, held in our office in Taunton, are as follows:



18th January 2012 (for General Broker users): To cover iprism integration and commercial screens, MTA and renewal procedures (inc. reporting and posting to accounts), full accounts (inc. posting, reconciliation, client and insurer accounts, commission transfer, and recommended regular reports)



15th February 2012 (for Financial Adviser users): To cover financial planners, fees and fee-timers, invoicing, contract enquiry (new process, inc. FinExpress link), diary and memos



14th March 2012 (for all users): To cover client management and marketing, diary and memos, paperless office (inc. templates) e-mail shots, complaints, web-link (for Client Facing Services), and system maintenance



18th April 2012 (for Financial Adviser users): To cover factfinds, Weblines quotes, TCF reports, full accounts (inc. posting, reconciliation, client and insurer accounts, commission transfer, VAT, retainers, reports, and RMAR reporting)

Sessions run from 10.30am until 3.30pm and include lunch. There are a maximum of 8 free places available at each session, which 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.

Improved policy register (available now for testing)

The new Complete Policy Register report allows you to associate a Word template of your own design with each product type, so now with just a couple of clicks you can print an entire "policy brochure" for your client, starting with your own front page with your company logo, an optional index page, and then a fully detailed document per policy (i.e. automatically populated with data).

New factfind populates financial planners

The latest Durell factfind (revision 6), has been developed to work with the new Financial Planners. Information entered in it automatically pre-populate the new Financial Planners, which may be used to display a client's lifetime cashflow, net worth over time, pension shortfall, life cover shortfall and inheritance tax liability. All Durell factfinds can also be viewed and updated via our Client Facing Services (e.g. by a client at home in the evening, using a home PC, notebook or iPad).

Payment by credit and debit card now accepted

We can now accept payments by credit and debit card (excluding American Express). We can source a variety of hardware including PCs, laptops, back up drives, iPads, printers and printer consumables.