



What's New Issue 6 November 2009

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"Our new integration with Weblines offers a cheaper, quicker way to get protection quotes, and a whole new business opportunity for many Durell users"

Robert White,
Managing Director

New Weblines integration

We are pleased to announce the new fully integrated link to Weblines to provide life quotes in our latest update to version 5.57. This will enable you to access Weblines' online quotation and fulfilment service, to retrieve a list of life quotes which can be taken-up through Durell. Sixteen major term providers are currently live on Weblines, as are eight investment bond providers and many other Providers across a wide range of products. The key benefits are that data doesn't need to be re-keyed (thus saves time), and quotes can be stored in Durell for take-up at a later time. Additionally, as much Life Protection business is unregulated all Durell users can use Weblines, though "General Broker" users will need to be licensed for "Complete Administrator" at no extra cost.

This link is provided free of charge if 36 take-ups are completed through Weblines per year (not just quotes or manual take-ups). If you process less than 36 take-ups through Weblines, it will cost £120.00+VAT for the year but note that this charge is per company, not per adviser, and is still cheaper than The Exchange.

If this is of interest to you please do not hesitate to contact us on 01823 326324 for further information.

Link to Financial Express Analytics

In the latest update we have also introduced a link to the "Analytics" service by Financial Express. This provides fund research and analysis for investments, enabling you to select funds and monitor performance. Analytics covers onshore and offshore funds, pension funds, life funds, investment trusts and equities, and is updated daily. It offers features including line graphs, scatter charts, performance tables, ratio data, factsheets, list builders, universe filters, and portfolio modelling. As Robert White explains, "The new link to Analytics provides ultimate investment analysis for high net worth clients".

Durell provides the link free to all supported users, however for it to work you will also need to subscribe to Analytics, which costs £5,000 per user per year.

Cobra report added

We've also added a new "Gross Written Premiums" report that matches Cobra's monthly return, so saves time and effort otherwise required to collate the information manually. Any Cobra member can now access the required information at the touch of a button. For more information please contact us on 01823 326324.

Enhanced policy viewing

In version 5.57 you can now view your active policies more clearly, as there is a new option to hide those classified as Dead, Lapsed, NTU or at Proposal stage. You can even set-up a 'user defined' classification to hide policies at any other stage (e.g. Active ones that don't require an annual renewal). When viewing the scrolling list of all policies these new options can be found by clicking the "Signpost" button and then selecting Policies / Display.

Improved online servers

We're pleased to announce the launch of our new on-line servers, which are hosted in a Data Centre that boasts a 100 Mb connection direct to the Internet spine. We've had several positive comments from happy clients impressed by the speed. We can provide a demonstration of a system on the online server if required.

"The key to the successful use of Durell, and achieving maximum benefit for your company, is having clear procedures supported by an effective training program"

Iain Waugh,
Operations Manager

Windows 7

All Durell systems have been tested and found to be compatible with Microsoft's new Windows 7 operating system.

Enhanced diaries

In the latest update we have improved the diaries by adding the facility to book appointments for multiple clients (for example, when inviting several clients to a meeting), saving time by eliminating the need to re-key data. In addition a record will be kept of the appointment so it will appear on the client's diary report.

Future release of new planners

Our development team is currently working on our new planners, due for release soon. These will be: Lifetime Cashflow, Pension Shortfall, Life Cover and Inheritance Tax. You may already have noticed their icons in the Factfind menu but their release has been delayed until associated factfinds have been developed to populate them.

Group training 2010

Following the success of last year's training sessions, we plan to hold more group training days around the country in January, February and April of next year. The days will run from 10.00 am until 4.00 pm and will cost £95.00+VAT per person. As usual, the topics to be covered will be chosen by those attending. We'll send more information soon.

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.

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

Durell's concerns

Ever keen to encourage the use of Durell to its full potential, Operations Manager, Iain Waugh would like to stress the importance of the following:

- **Consider adding a Weblink to your website.** The Weblink facility enables chosen clients to log in via your website to view their personal details, basic policy details and investment valuation. They may use it to directly update their personal details and also to complete a factfind on-line. At £250+VAT plus just £27.50+VAT per month for secure hosting and support, this is a low cost way to provide an additional service to your clients.
- **Update your Durell system.** Our latest release is version 5.57, so please update your system to access its new features and fixes. Upgrading to the latest version also ensures our support team can diagnose and solve problems more efficiently.
- **Ask Durell for advice.** As well as providing software support, we can also give impartial advice about other concerns, including network set-ups, back-up procedures and hardware. In particular we would ask anyone thinking of purchasing a server to contact us, as we have had problems in the past with third-party servers.
- **Make good use of the accounts.** Not only will this keep all your information on one system, but good use of the accounts will enable you to process a GABRIEL report and utilise all the features of the TCF module.

To discuss any of the above points please contact Iain or Robert on 01823 326324.