Newsletter - What's New

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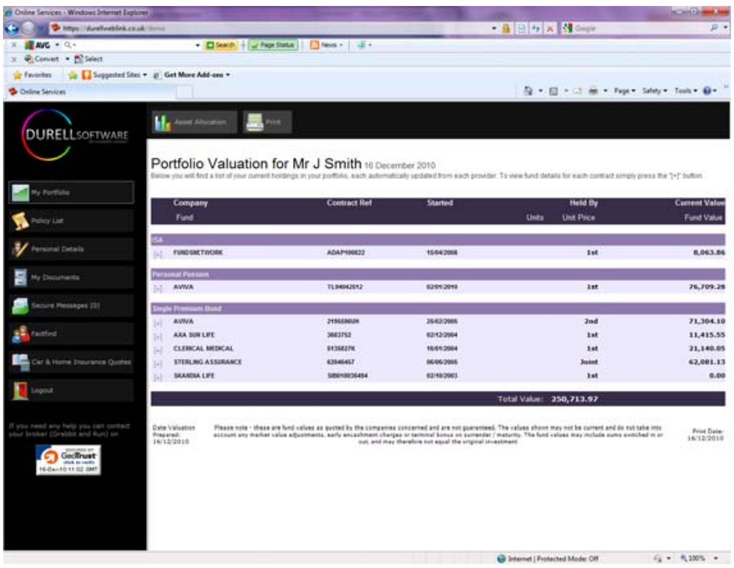
"Durell has really upped its game with its new Web-Link, which can now display fact finds, personal details, investment valuations, policy lists, documents, secure messaging and even home and motor quotes - all working in real time from your own website."

Robert White,
Managing Director

Web-link improvements - instant valuations, document store, secure messaging and motor and household quotes

Due for release soon, our improved Web-link boasts additional features which can help you become RDR ready. Via your website your clients can now access **instant** valuations, documents you have uploaded (e.g. policy information or letters) and a secure messaging service, as well as a policy list, asset allocation information, fact find and personal information. In addition the Web-link has been given a design overhaul and now looks modern and eye-catching as well as more user-friendly. The Web-link screens are user-definable so you can choose which screens your clients will see, which colours to use (e.g. font and background colours) and you can also add your own logo. If you are a general insurance broker the Web-link can be used to create your own cost comparison website by adding motor and household quotes.

For our Life and General users the benefits are the same—your clients will visit your website more frequently and therefore will notice any news or special offers. It will create a central place for all your clients' investment and insurance needs, and you can choose to charge a fee for the service. The Web-link is available for a £250+VAT set up and £27.50+VAT per month servicing charge. All you will need is a suitable website on which to host it, a Durell system and a good broadband connection with a fixed (or "static") IP address.



For more information (including access to a demonstration Web-link) please go to our website, click on the 'Services' tab and select 'Web-link'. Alternatively please contact us on 01823 326324.

Four new and improved planners now available for testing

Our four new/improved planners are now available for testing. The planners are for Lifetime Cashflow, Pension Shortfall, Life Cover and Inheritance Tax and will be produced from the data entered in a client's associated factfind. The planners are generated in an Excel spreadsheet which can then be saved or edited to suit your client's requirements. Whilst still in the beta testing stage, we can now offer you the chance to try these planners, so if you are interested please contact us.

"Many Durell users now attend our free monthly training sessions in Taunton. They say they find them instructive and informative - and the lunch isn't bad either."

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.

We do not encourage email as a way to obtain technical support from our team, nor should the sales number be used to log any support queries. 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 in 2011

We will continue the free monthly group training sessions in our offices next year. Those already planned are:

19th January 2011 (for General Broker users): General Broker Overview, Online Motor and Household Quotes, Claims Tracking and Reporting, Full Accounts (inc. Posting, Reconciliation, Client and Insurer Accounts, Commission Transfer, Accounts Reports and RMAR Reporting)

16th February 2011 (for Financial Adviser users): Factfinds (inc. links to website and new lifetime planners), Policy Overview (inc. Compliance screens and posting to Accounts), Full Accounts (inc. Posting, Reconciliation, Client and Insurer Accounts, Commission Transfer, Accounts Reports and RMAR Reporting).

16th March (for all users): Client Management and Marketing (inc. categorising clients, mailshots, client reviews, spreadsheets, user definable reports), new improved Web-link, Management Reports, TCF Reporting, Complaints, System Maintenance (inc. back up procedures)

6th April (for Financial Adviser users): Online Contract Enquiry (inc. setting up and using), Investment Valuation Reports, new improved Web-link, Webline integration

The free sessions will be held in our office in Taunton and will run from 10.30am to 3.30pm. Refreshments and lunch will be provided. To book your place (maximum 2 people per company at each session) please contact Kate on 01823 326324. Places will be allocated on a first come, first serve basis.

Ron Jeffs is leaving Durell after 27 years

At the end of January 2011 Ron Jeffs will be leaving after 27 years at Durell. An integral part of the support team, Ron has seen many changes over his time here including the move to IFA and insurance software from gaming software, and the development of a Windows version of Durell. Ron will be missed by Durell staff and users alike. However he will be offering a book-keeping service to Durell users after he leaves - for more information please contact Ron on 01823 334171 or by email to ron@RJaccounting.co.uk.

Wrap platforms and contract enquiry

Durell already integrates with the Transact and Funds Network wrap platforms but in update 6.1.00 (released on 15th December) we have included new links to Ascentric, Octopus and SIS Skandia for contract enquiry. Octopus will automatically appear in your "Setup / Online Contract Enquiry" screen as soon as it's been activated by the providers, which should be before January 15th. The other two are already live.

Improvements for General Insurance users

In the last two updates we have released new and improved features for our General Insurance users including, a facility to search Historic policies (i.e. deleted ones) with access to their full details via export to Excel or Word. We've also added a Discount Calculator on the Premium screen, many improvements to the Motor section, improvements to the Renewal Checklist, and some new Motor/Fleet screens.

New look website

As you may already know our new-look website is now live. Not only has it been redesigned with new fonts, graphics and our new logo, but it now includes many more features such as a feed from our Twitter account, a cost calculator, more information about Durell Software's features and a download centre (for information sheets and newsletters). Please take a look at www.durell.co.uk