



Contact Management

“This system goes way beyond just recording names and addresses. It provides immediate time savings in managing client details, but then lets us do credit control and marketing, providing even more efficiencies.”

You deal with many different people and organisations. All of these should be recorded in the contact database so you can quickly access their information, and always have it available.

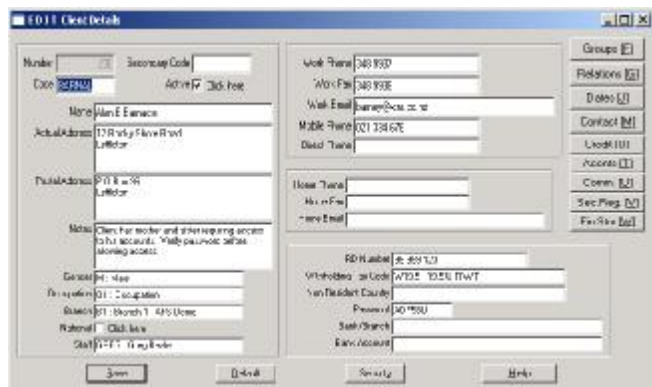
The contact database will manage the details of all clients you deal with regularly, your investors, dealers, brokers, insurers etc. It should also include creditors, prospects; essentially anyone with whom you wish to keep in touch.

That way, their details are recorded in an easily retrievable form. If a contact is already on the database and they then become a client you just need to add their account details. There is no need to set them up again.

The efficiency with which you are able to deal with these contacts can be critical to their perception of you. A system is required that allows you to very easily access contact information, and keep it up to date. It has to be easy to change and control, and be able to accurately keep track of those changes.

Administration Savings

Contact name and address details are entered only once, no matter how many accounts that contact may have with you. If a contact address or telephone number changes, the change need be made only once, and all accounts will be affected. This means that your administration time spent in setting up and maintaining contact details is kept to an absolute minimum.

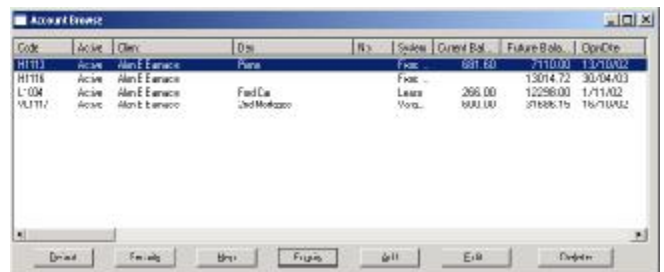


The main contact set up screen allows you to record actual and postal addresses, contact numbers etc. Also recorded are Inland Revenue details for investors, and bank details for payments by direct credit.

Whenever an address change is recorded for a client, a change of address record is created. This allows you to keep track of all previous addresses for a client. This in turn assists with better credit control.

Exposure Risk Minimised

You can immediately see your exposure to a client over all accounts they have with you. This allows you to see an instant snapshot of a client's position and whether you are able to lend more. Old and current loans are displayed and can be accessed. You can quickly see the history of the client with you.



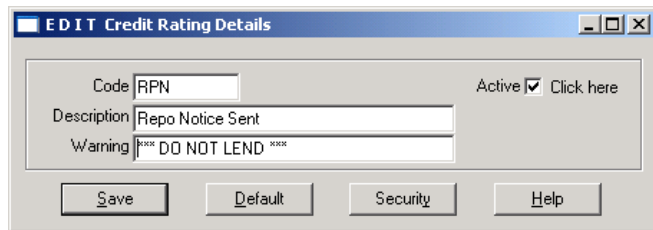
From the main client screen you have access to all of the accounts owned by a client, and allows you to ascertain the exposure you have to that client

Your Own Credit Rating System

You can set up your own credit rating system. A rating can be manually allocated to a client, or automatically assigned by the system. If a client asks for finance in the future you will then have immediate access to your credit rating for them.

Each credit rating can have its own user-defined message. This will display every time a client or related account is accessed that has that credit rating attached.

This means you will be immediately aware of vital credit information about the client, so important decisions can be made immediately.



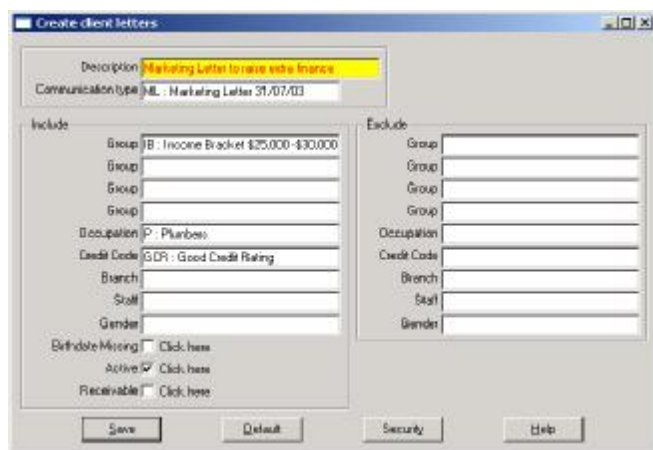
You can set up your own structure for the credit ratings you wish to apply to your clients. A credit rating can have a user-defined message that will appear whenever an account is accessed.

Credit ratings can be associated with overdue letters. When a letter is generated for a client account, the associated credit rating is automatically updated. This will save you a considerable amount of time updating client credit rating details.

Marketing

Contacts will have their Gender and Occupation recorded. You can also set up user defined Group codes that will allow you to further define attributes that apply to your contacts.

This will enable you to easily extract all clients who fulfill certain criteria so that you can mail to them requesting further funds or perhaps offering extra finance at an attractive rate. The process is highly automated, which means you can market to a selection of clients in a matter of minutes, rather than hours or days.



This screen shows how a marketing letter will be

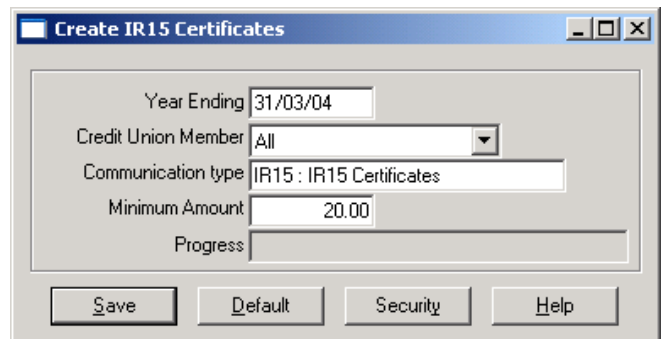
generated to send to all Plumbers with a good credit rating and with an income between \$25,000 and \$30,000.

Marketing links to MS Word™ through the Communications System. This allows you to design your marketing letters in whatever way you want to achieve your desired result.

IR15 Certificates

If you have investors, then you will need to print IR15 Certificates at each year-end.

A contact may have a number of investment accounts with you. The interest earned and Resident Withholding Tax deducted is totalled for each of these, and incorporated within the IR15 Certificate. These can then be generated for each client and printed on a form that has already been authorised by the IRD. Two versions are available. One is for plain paper, while the other can print on your letterhead.



The above screen allows you to nominate the communication type that will be used to print the IR15 certificates. You can also nominate a minimum amount. Clients with total interest over all of their accounts less than this minimum will not have a certificate generated.

Typically you will print the IR15 Certificates one or two days after the year end. Your clients will love it, because they are getting their tax information straight away.

A diskette is automatically produced containing the information required by the IRD. This is another significant time saving feature.

“The IRD system is excellent. It has saved me at least 1 week or more of work – HUGE BENEFIT” – Joy Drummond, Finance & Investments

Minimum Hardware Requirements

IBM compatible PC with a minimum of 128Mb RAM
Pentium II processor 350MHz
Laser Printer
CD Writer for Backup

Software Requirements

Microsoft Windows 98, NT, 2000 or XP
Microsoft Office 97, 2000 or XP

Networking

Windows NT4, 2000 or 2003
Terminal Services supported
If more than 5 users then we recommend MSSQL Server, otherwise MSDE will be used as the database.
File Server with 256Mb RAM minimum, preferably 512 Mb
Pentium III 500Mhz processor