



**FTBoss Financial Services Case Tracking System is a comprehensive and web-enabled database package ideally suited to organisations with just a few advisers to those with hundreds.**

**As well as monitoring every part of the sale process, FTBoss maintains performance statistics for Products, Suppliers, Consultants, Sales Offices and Referrals, calculates consultant commission and links to spreadsheets for further analysis. All events can be entered into an online diary and correspondence is automatically generated via letter and email.**

**FTBoss is fully web enabled allowing to consultants to see current case progress in real time. Any ODBC-compliant database may be used with FTBoss.**

## **Overview**

FTBoss is part of Clarks Computer System range of corporate estate agency software. Its primary function is to record, track and report upon products sold by advisors working within an estate agency environment but is also ideally suited to any financial services operation.

Its key features are:

- Comprehensive recording of client information
- Detailed life, mortgage and general policy information
- Consultant/Area Manager Performance Reporting
- Branch/Division Performance Reporting
- Negotiator/Introducer Performance Reporting
- Product & Company Performance Reporting
- Commission Calculation
- Automatic Diary Entry Generation
- Letter/Email Generation
- Statement Reconciliation
- Debtor Reporting
- Full Integration with Microsoft Office Products
- Web Enabled
- Integrates with popular postcode software

## Sample Screenshots:

The following screenshots constitute the majority of the FTBoss input screens and are good indication as to the comprehensive nature of the application...

### Client Screen

**FTBoss - KFS** Paul Jones Current Period 200209

Branch: Anytown FA: Alan Archer AFSM: Andrews Arthur Div: Amy Atkins Neg: Alice Aston

**Life 1** Surname: ACKERMAN Forename: ALEXANDER Title: MR DoB: 14/08/70 Email: ackers@xyz.co.uk Emp. Status: Employed

**Life 2** (Empty)

**Telephone Numbers** 07957 802 425 mob 0171 428 9246 - HM

**Control** Date Amended: 16/04/02 Amended By: 0 Client ID: 14

**Salutation** Mr Parker Mar. Status: Single

**Current Address** 159 CAMDEN STREET LONDON N1W1 0HX PC

**Property Address** 32B ANSLETT ROAD LONDON SW6 1LJ PC

**Policies** Mortgages Agent Solicitor Notes Future Compliance

New	Accept	On Risk	Not P	Lapsed	Claw B	Paid	Policy	Company
199941	0	0	199944	0	0	0	Home Provider with CI	Winterthur Life Ltd 1
199941	199941	0	199944	0	0	0	ASU	Paymentshield 1
200209	0	0	0	0	0	0	ASU	Legal & General Life Assu 0

Record: 1 of 5389

Records all details relating to the client(s). The tabs along the lower half of the screen ensure rapid access to all aspects of client information. Advanced searches, email, reports and letters are only a click away.

### Policy Screen

**FTBoss - Policy** ID: 47 ClientRef: 14 FSRegion: 5

Branch: Anytown FA: Alan Archer AFSM: Andrews Art Div: Amy Atki Neg: Alice Aston

Date: 14/11/01 Company: Winterthur Life Ltd

SU: 199941 Policy: Home Provider with CI

AC: 0 Policy No: 71235753

EX: 0

NP: 199944 Sum Assured: £300.00 Term: 25

LA: 0 Premium: £3,386.10

CB: 0 Comm. Due: £3,386.10

PD: 0 Comm. Rec: Clawed Back: 0

Applies To:  Joint  Life 1  Life 2

Pipeline:

Split with: Alan Archer

1st Split %: 50 2nd: 0

Posting Ref: User Ref: 11 Date Amended:

**Dropped** Why: Underwriting Amount: £3,386.10

Record: 1 of 3

Tracks the history of the life/general insurance policy from sign-up through on-risk/not proceeding to payment. Commission can be automatically calculated from rates entered in the product/client screens.

## Mortgage Screen

Sales - Mortgages

FTBoss - Mortgage ID 50 ClientRef 14 F9Region 5 M

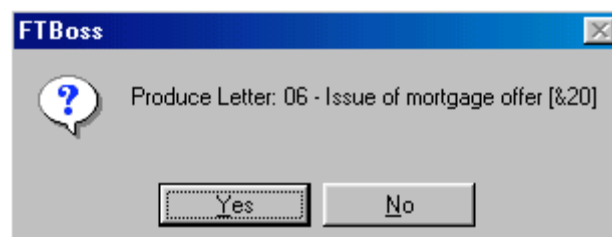
Branch Anytown FA Alan Archer AFSM Andrews Arthur Div. Amy Atkins Neg Alice Aston

Date 30/11/99 Price 167500 Mortgage Type Interest Only Posting Ref  
 SU 199941 Mortgage 145500 Product Fixed User Ref 0  
 AC 199945 Mortgage % 86.87 Company Halifax Date Amended  
 EX 199947 Period Yrs Company Branch EUSTON Pipeline  
 Comp. 199947 Penalty End 12/99 Account No A/11195007-3 Split with  
 NP 0 Interest Rate Proc.Due £480.15 1st Split % 2nd  
 LA 0 Term Proc.Rec £480.15 Mortgage Description  
 CB 0 Clawback Amount  
 PD 199950

Survey Inst. 01/10/99 Done 15/10/99 Back 17/10/99 Mortgage Offer 03/11/99  
 Refs Req. 18/10/99 Back 25/10/99  
 Dropped Why Amount

Tracks the history of the mortgage from sign-up through acceptance and on-risk/not proceeding to payment. Procurement fee can be automatically calculated from rates entered in the product/client screens.

Certain fields act as triggers, for example when a mortgage offer date is entered, a prompt to produce the appropriate letter is triggered:



The letter (or email) is then automatically produced

Dear Sir or Madam

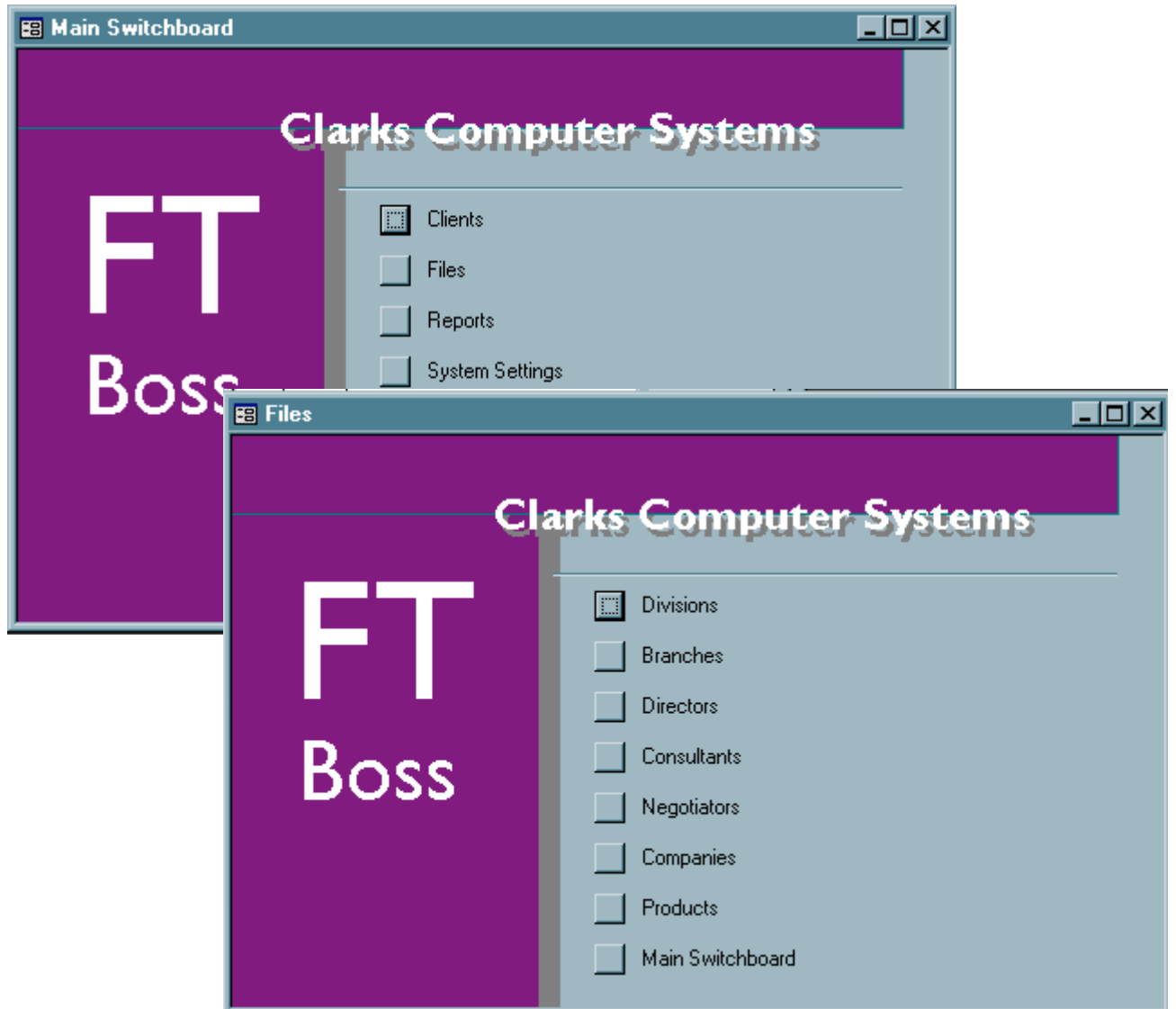
**Property Finance for 32B ANSLETT ROAD FULHAM**

I am pleased to advise you that a mortgage offer in respect of the above property was issued by the Halifax on 3<sup>rd</sup> November 1999.

If you require any further information, please do not hesitate to contact me.

Yours sincerely

## Menu Screens



## Region/Division Screens

The image shows two overlapping data entry screens for 'Divisions'. The left screen shows a simple table with columns 'ID' and 'Name'. The right screen shows a more detailed table with columns 'ID', 'Name', 'Region', 'FS Region', and 'Op'.

ID	Name
1	North
2	South
3	East
4	West
5	Scotland
*	(AutoNumber)

ID	Name	Region	FS Region	Op
24	Mika Norman	5	KFH	1
25	Eddie Hill	5	KFH	1
26	Clive Sinclair	5	KFH	1
27	Greer Garrity	5	KFH	1
*	(umber)			0

# Branch/Consultant/Negotiator Screens

**Branches**

**FTBoss - Branches**

Code  Ref  Op

Name

Division

FA

**Targets**

Submitted

Opened

**Consultants**

**FTBoss - Consultants**

Ref  Type  OP

Name

AFSM

**Targets**

Submitted  On Risk

Code

Joined

**Negotiators**

**FTBoss 97 - Negotiators**

Ref  Type (N/S)  Op

Name

Branch

Manager

**Targets**

Written  Business

Code

Joined  Left

## Companies Screen

ID	OldRef	Name	Rate	Threshold	Percent	Panel
10	ABN	Abbey National			0.25	<input checked="" type="checkbox"/>
12	ALL	Alliance & Leicester Less than £100,000	100	0	0	<input checked="" type="checkbox"/>
228	A&L+	Alliance & Leicester More than £100,000	0	0	0.2	<input type="checkbox"/>
202	BOI	Bank of Ireland	0	0	0.25	<input checked="" type="checkbox"/>
26	BOS	Bank Of Scotland	0	0	0.25	<input type="checkbox"/>
28	BAC	Barclays	0	0	0.25	<input checked="" type="checkbox"/>

Record: 1 of 60

## Products Screen

**FTBoss - Products**

ID: 230 OldRef: APPP

Name: Appropriate Personal Pension

Group: 12 Pension

Company: Legal & General Bank

Rate25: 0

Rate24: 0

Rate20: 0

Rate15: 0

Rate10: 0

Rate05: 0

Record: 1 of 175

## Diary/Letters Screen

**FTBoss - Diary Note**

MR LUKA / MR LUKA

Date Entered: 17-Jul-00 User Name: Olivia Watson Done

Schedule for days or weeks ahead of today

Action Date: 19-Jul-00

Note: Call Bof Ireland for an

**FTBOSS Letters** Mortgage Using address: Current

01 - Receipt of Application	c:\boss97\ftkfs\KFSAM01.doc	1	0
02 - Change of lender	c:\boss97\ftkfs\KFSAM02.doc	1	0
03 - New, additional or change of product	c:\boss97\ftkfs\KFSAM03.doc	1	0
04 - Purchase fallthrough	c:\boss97\ftkfs\KFSAM04.doc	1	0
05 - Change of purchase	c:\boss97\ftkfs\KFSAM05.doc	1	0
06 - Issue of mortgage offer	c:\boss97\ftkfs\KFSAM06.doc	1	0
07 - Advice to agent	c:\boss97\ftkfs\KFSAM07.doc	1	0
08 - Acceptance of other product [&22]	c:\boss97\ftkfs\KFSAM08.doc	1	0

Signed by: Paul Jones

Send By:  Letter  Email

Produce Document

Display:  All  General  Mailing  To Do

Add Note

## Sample Reports:

Flexible reporting is made easy by the FTBoss Report Parameters Screen

The screenshot shows a software window titled "frmReportDetailed : Form" with a purple header bar that reads "FTBoss Report Selection - Detailed". The form is organized into several sections:

- Report:** A dropdown menu currently set to "Consultant\_Detailed\_Master".
- Heading:** An empty text input field.
- Period:** Two text boxes labeled "From" and "To", both containing the year "20029".
- Include:** A pink box containing several checked checkboxes: "Life", "General", "Mortgage", "Gen. ASU", and "Gen. B&C". There are also two small numeric input fields with values "1" and "19".
- Pipeline:** A purple box with three radio buttons labeled "A", "B", and "Both", and a small numeric input field with the value "8".
- Page Breaks:** A blue box with two unchecked checkboxes: "After Branch/Consultant" and "After Division/AFSM".
- View Report By:** A blue box with two radio buttons, "Detail" (selected) and "Summary".
- Email Test Mode:** A pink box with an unchecked checkbox labeled "On" and a button labeled "Edit Email Settings".
- Consultants (39):** An orange box with a dropdown menu showing "Alan Archer" and an unchecked "All" checkbox.
- AFSM:** An orange box with a dropdown menu and an unchecked "All" checkbox.
- FSD - Sales Managers:** An orange box with a dropdown menu and a checked "All" checkbox.
- Branch:** A green box with a dropdown menu and an unchecked "All" checkbox.
- Division:** A green box with a dropdown menu and an unchecked "All" checkbox.

At the bottom of the form, there are three buttons: "Email" (with a lightning bolt icon), "Print" (with a printer icon), and "Exit" (with a power icon).

Any combination of data can be entered and reported on.

Reports shown by Consultant are also generally available by branch and negotiator.

Reports can be automatically emailed to consultant, branch or manager.

Reports can be exported to Microsoft Excel for further analysis.

## Report Examples:

Here a just some examples of FTBoss's comprehensive range of reports...