



Mortgage Fundamentals Advanced Reports

Allowing detailed analysis of case information

Analyse compensation payouts based on any number of factors | Look for trends in data | Check for missing information

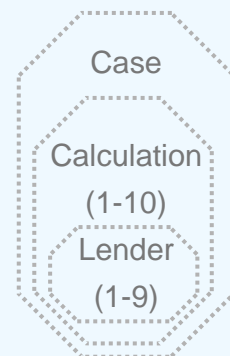
Existing Reports

The existing reports module does allow management reports to be produced showing case volumes and compensation payments. This functionality is still present in the new reports with the addition of a new user definable advanced reports option.

Information

Within Mortgage Fundamentals is the case information relating to cases entered from the time you first starting using Mortgage Fundamentals. Until now getting to that information for analysis purposes has been somewhat restrictive.

Advance reports allows access to various levels of information based on the distinctive levels of information available from Mortgage Fundamentals.



Setting up reports

The advance reports has a wizard based interface allowing the type of information required in the report and criteria of the report to be selected / entered with ease. Standard averaging, maximum, minimum, totaling and count functions are all included, along with the ability to enter in formulas.

Analysis

Verifying your information is very important, ensuring the quality of your cases and that cases all perform within set criteria. Some examples of reports that you may create are as follows:

1. Verify duration of case versus the level of compensation, factoring in the amount of the policy.
2. Check correct number of endowment premiums and surrender values entered versus the number of calculations (policies) in the case.
3. Ensure DTA premiums have been added in.

Multiple levels of information

The information available has been structured to allow easy access, being grouped into distinctive areas.

Case summary (High level information on whole case)

Case specific
Lenders used
Interest rates used

Calculation summary (Information on each part of calculation)

Case specific
Lenders used
Interest rates used

Individual items (Lowest level of information)

Retaining your reports

Once you have created reports they are stored for later use and you can reopen the reports specifying new criteria.

Future developments

As with all our systems we are constantly updating them and future developments of the reports will include improved accessibility to the information.