

Allianz Landlord Insurance is now available through the insurance quote module. The module will detect the purpose and investment options to display the appropriate landlord insurance quote

Traffic Lights:



Triangle indicates:

- There is an outstanding item missing in the application layer that needs to be addressed.
- No salesperson has been assigned.

Red indicates:

- There is an outstanding item missing in the application layer that needs to be addressed; however, a salesperson has been assigned to the application.
- The file is currently pending completion by an external party, such as a broker or customer, who must provide the outstanding information requested.

Green indicates:

- The file has no outstanding documents in the application layer and is with you for completion.

Note: The file cannot be approved unless all outstanding documents have been provided. For instance, a file where all sections are accepted in the assessment layer but has a blue indicator for a missing item in the application layer cannot be approved until all items in the application layer have been provided or actioned.

New Toggle Feature for Displaying Salesperson and Assessor Details

In the application and assessment layers, we have added a pop-up toggle to display the name of the salesperson associated with the application, as well as a new Assessor field to show the Assessor assigned to the application.

In the application layer, only the salesperson's name will be visible. When you click the toggle, indicated in green below, a pop-up will appear displaying both the salesperson's and the assessor's names.

In the assessment layer, only the Assessor field will be visible, showing the assessor's name.

The image shows a form with two columns: 'Sales Person' and 'Assessor'. Under 'Sales Person', the name 'Ahmed Nabi' is displayed next to a green square toggle icon. Under 'Assessor', the name 'Rhiannon Lucas' is displayed next to a similar green square toggle icon. Below these fields is a light blue pop-up window containing two rows: 'Sales' with the name 'Ahmed Nabi' and 'Assessor' with the name 'Rhiannon Lucas'.

Reporting:

Some new reports have been added:

Treasury Report - tracks funds used from an allocated funding pool by loan category type.

Interests and fees calculate the total interest and fees charged to all customers within a specified date range.

Product balance calculates funding per product