



Client Care Desktop

4.50 Release Notes



SYNAPTIC
CLIENT CARE

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Introduction

The Synaptic Client Care Desktop (CCD) 4.50 release contains a number of improvements to the existing application as well as minor bug fixes and performance enhancements.

The focus has substantially been around the technical side of the product.

This document provides an overview of the significant changes, but does not detail every modification made to the system to improve the overall product where the functionality is the same as previous versions of the software.

If you are upgrading from a previous version of CCD then all of this document may be of interest to you. If you are a new user of the software, you may only be interested in the new features section of this document.

New features

Branding and logos

Updated look to the main screen with the new branding displayed. Your company logo can be viewed on the main screen with a choice of size settings, activated within the user information setup section. Interactive logos display contact details for integration partners.

FileMaker upgrade

The upgrade to a later version of the underlying database, FileMaker, provides performance enhancements as well as support for later operating systems. The minimum specification document contains detail of operating systems supported.

New installer package

Downloadable installer package, enabling quicker and easier deployment of upgrades and installations.

Management Information reports

A new statement report for the Company to create a 48 month projected income report on all or specified income types and frequencies.

Group schemes

The batch wizards have been extended to allow the update and completion of more data across the group members, in the areas of benefits, adjustment of contributions, scheme sections.

Document filing

A new document filing solution enables you to link records within the system to your existing document folder structure.

Retention of Editable Value Lists

The Editable Value Lists in your existing system will be retained as part of the upgrade routine and appended with relevant new items where appropriate. Please refer to the Editable Values Lists document for more detail.

Modifications

Clients

- Restructure of client addresses including quick search functionality
- Free format text on the client invoice
- Servicing reviews have extended notes area
- Verification of Identity form populates additional details to aid completion
- Additional filters added to client review due and completed reports

Holdings

- Total of withdrawals taken to date displayed on overview screen
- Updates around the SIPP and Wrap screens
- Click on the (i) button to view the fund code information on assets selected on a holding
- Fund code information will display when you hover over each asset in the list view on the holding

Workflows

- Work groups have been updated to workflows and include the ability to add a new work item within a task and view current workflows by Adviser

Document Management

- Ability to scan within provider records for INVU and Virtual Cabinet users
- User configurable option to use long or short client name format for INVU and Virtual Cabinet users

Client reports

- Reports will now default to the printable view
- Updated buttons. Extracts and PDF options are standard on all client reports, which will be displayed on screen to enable the user to save in the appropriate directory

System reporting

- The table of holding records within the admin reporting area contains additional mortgage related data
- Updated marketing wizard for unused ISA allowance
- Regulatory reporting will run at a location (branch) level in addition to firm level
- Extracts to spreadsheets will default to xlsx file type
- Extract available on each of the electronic remuneration transaction reports
- Reconciled date within a settled receipt can be amended by users with administration level access

Contract Enquiry updates

- Fund code information will be displayed during the matching and selection process
- Improvements around fund import routine with updated import template

Generic system updates

- To prevent closing the system in error, a warning message will be displayed when clicking on the cross at the top right of the window
- A simple process has been introduced to migrate all records associated with one product provider to another product provider
- Additional fields have been included on the software updater tool, which sends updates to your system for easy download
- A company ID has been introduced to the licence process which will require a new key at point of upgrade



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