



Case Transfer for Mortgage Fundamentals

The easiest and most comprehensive method of sharing information
with other Mortgage Fundamentals users

Need to send or receive a case to / from another Mortgage Fundamentals user?

Why spend time re-entering / modifying cases?

Many companies now use Mortgage Fundamentals, and our new Case Transfer module allows users to transfer cases with the minimum of effort, both internally and externally.

The use of the software couldn't be simpler;

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| Exporting | Select the cases you want to send to another party, enter appropriate text and save the cases to a file. The file can be put on a floppy disk or e-mailed to the recipient. |
| Importing | Select the file created by the exporter and then select the cases required for import with the group you wish to load them into. |

Simplification

Discussing a case with a third party can be very difficult without their having access to the case. Using our Case Transfer module the discussion process is simplified as cases can be quickly loaded and verified by another party.

Examples of use

Complaints process

The Financial Ombudsman Service is one of our customers who has already purchased the Case Transfer module and passing cases to them via Case Transfer will remove the need for information to be re-entered.

Examples of use (continued...)

Outsourcers

Completed cases can be sent to your client via a floppy disk or e-mail allowing them to load these cases onto their system for future reference

Companies

For companies using external outsourcers you can now load the cases processed on your behalf straight into your system, or pass existing cases to an outsourcer. In addition, if you are using external auditors or require assistance on particular cases, these can also be easily transferred.

Confidentiality

All files are encrypted ensuring security of the information whilst removing the ability to gain access to the files by unauthorized personnel.

Audit Trail

Any case that has been exported will have a contact history record generated to indicate this. This also happens with imported cases. Imported cases retain the source company and reference number of the original case. Relevant comments may also be added to each exported case for future reference.

Information Transferred

Most of the information relating to a case is transferred. The information exported is as follows:

- Address information
- Adjustment sets
- Case Information (All calculations and lenders)
- Party Information

Licensing Information

Case Transfer does require an additional licence which is directly linked to the Mortgage Fundamentals licence and costs will be calculated on a pro-rata basis for licenses less than twelve months.

Technical Information

Case Transfer uses the same platform and components as Mortgage Fundamentals.