



**CRS**

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# **Commission Register System**

Developed By



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## Introduction

**CRS - Commission Register System**

Is the Ultimate Book Keeping tool for any Broker and Loaning Company. This software is designed for loan companies to keep track of commissions payable to them from the Aggregator.

The Aggregator emails each Member a Commission Register as a .csv file. This register may also available for download off the Aggregators' website to be saved to your computer.

## Testimonials

### *Paul Hutchins Loans Centre*

"In late 2008 I went to Regional IT to request that they write a trail commission software package to check our trail commissions each month to ensure we are getting the correct payments. This would then allow us to do away with the manual processing of this function which could take up to 5 hours to complete.

We worked with them in developing what we wanted to be able to process different trail streams from 2 different aggregators, being PLAN and AFG, as well as suitable reporting mechanisms.

It has now developed even further with other Brokers coming on board and using the software, to a point where the speed, reliability and reporting is accurate, helpful, and easy-to-use.

We have reduced our time to process the trail commission to about 2 minutes, and then it's just a matter of sending off your claim queries to the aggregators to follow up any missing trail as generated by the report.

I truly believe we have saved not only time in processing the trails, but also found commissions we were not being paid for or were missed by manual checking. This has added dollars to our bottom line and saved staff hours of processing time. It also has meant we are able to catch people either refinancing, topping up, or just in arrears on their loan earlier, and also to know exactly where our loan book is at.

This software is a must for any broker, large or small, new or old to the industry, and whether your aggregator has this sort of application or not. It's Quick, Easy, Independent, Standalone, and it will make sure that you are getting ALL of your TRAIL INCOME."

*Paul Hutchins*  
**Owner Paul Hutchins Loans Centre**

### *Riverland Lending services.*

"We have been clients of Regional IT for 2 years and have been impressed with both their product and service. Regional IT designed a product specifically for our needs which has saved us valuable time and money. Their attention to detail and follow up service has exceeded all our expectations. We would highly recommend Regional IT to others!"

## Testimonials cont...

*Kristy.*

“The support that the guys at Regional IT provide is fantastic! The fact that there is such a little need for support as the CSR product is great and easy to use just makes the friendly “touching base” phone calls an added bonus.”

“No problem is too big or too small for them to take the time to discuss, research and present an easy to understand solution.”

“Fast, friendly, informed, courteous professional service is one of their strengths...not to mention their great software!”

## Functions of CRS

- Import the file from the emailed .csv file or the downloaded file from the Aggregator.
- View Loans & Commissions - view the details that have been imported into CRS.
- View Commissions - a more detailed view of commissions received against loans.
- Print Loans & Commissions - print commissions received up to the date specified.
- Commissions Summary - print a list of missing commissions.
- Employees & Security - set up of user access.



Browse Loans

Undo Last Import

Loan Details

Active?	Loan ID	Initiator	Lender	Split Code	Original Loan Amount	Lodged Date	Settlement Date	Borrower
✓	000000004ML01	Fred Bloggs	ABC Bank	PURPLE	\$317,490.00	21/08/07	6/07/07	Smith John
✓	00000520L01	Fred Bloggs	Zula Bank		\$100,225.00	17/09/07	12/10/07	Underwood Gerard
✓	00008579cr		XYZ BANK		\$200,000.00	9/07/09	9/07/09	SWEENEY KAITLAN
✓	0001105121ML01	Fred Bloggs	ABC Bank		\$190,374.00	10/10/07	19/10/07	Spade Jamie
✓	0001111111ML01	Jane Citizen	ABC Bank		\$91,300.00	10/04/07		Holiday Kevin
✓	0001210400RC01	Fred Bloggs	ABC Bank		\$125,000.00	2/01/07	26/01/07	Holiday Kevin
✗	000141414141RC02	Fred Bloggs	Zula Bank		\$177,340.00	8/11/06	9/07/09	Paki Freda
✗	0002322222ML02	John Smith	ABC Bank		\$79,722.00	7/12/07	9/07/09	Holiday Kevin
✗	0002323232L01		Demo Bank		\$0.00		9/07/09	Case Orson
✗	0002424242ML01	Fred Bloggs	Demo Bank		\$12,000.00	18/09/07	28/09/07	Master Lyn
✓	0002828282m01		Demo Bank		\$0.00			White Sven
✓	0003232323RC02	John Smith	Demo Bank		\$275,911.00	5/02/08	21/02/08	Smith Gertrude
✓	0003333333RC01	Fred Bloggs	ABC Bank		\$185,000.00	7/03/08	21/03/08	Star Marg

Loan Count: 90

Lodge a New Loan

Add / Edit Comment

Make Loan Inactive

Commissions:

Last Import Date	Install	LoantAmount	Type	Commission	CommGST	CommTotal
31/05/08	1	\$130,789.25	Trail	\$18.09	\$1.81	\$19.90
9/07/09	1	\$185,283.35	Trail	\$38.41	\$3.84	\$42.25

Searches

Show Only Active Loans?
  Show Only New Loans?

Show Only Loans with Missing Commissions?
  Show Only Loans with Variations

Show Only Newly Lodged with No Commissions?

Search Initiator:   
 Search Borrower:   
 Search Loan ID:   
 Search Lender:

Legend

RED - Missing Commissions for the month  
 GREEN - New Loan  
 ORANGE - Variation by more than 20% in Commission Paid between months  
 BLUE - Normal Loan

Close Help

### RED - Missing Commissions for the month

Loans where no commission has been received in the imported month.

### GREEN - New Loan

A new loan that the first commission is being received for.

### ORANGE - Variation by more than 20% in Commission Paid between months

If the commission amount differs by more than 20% from the previous import.

### BLUE - Normal Loan

A normal commission received on the import for an existing loan.

## Reporting

Run a Commission Summary report to show any missing commissions that need to be received.

Print Loans & Commissions report to show all loans currently within the system

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