

ACE 5.1: More Secure than Ever!

Introduction

ACE is a member centric CRM and until now everyone who opened ACE got the same view. With ever tightening privacy regulations and dually employed staff, this is no longer the case.

Two of the most important features of this version of ACE revolve around restricting access. The first involves restricting access to the content of particular contact types, namely those of Financial Planners and Collections Groups. The second is restricting information on credit union staff accounts.

This edition of the ACE Insider will highlight a few of the major changes that were made to ACE as a result of feedback we received from our clients. In addition to the restricted contacts we will look at how users can link associated or related accounts and will also feature the newly customizable fields in the Profile section.



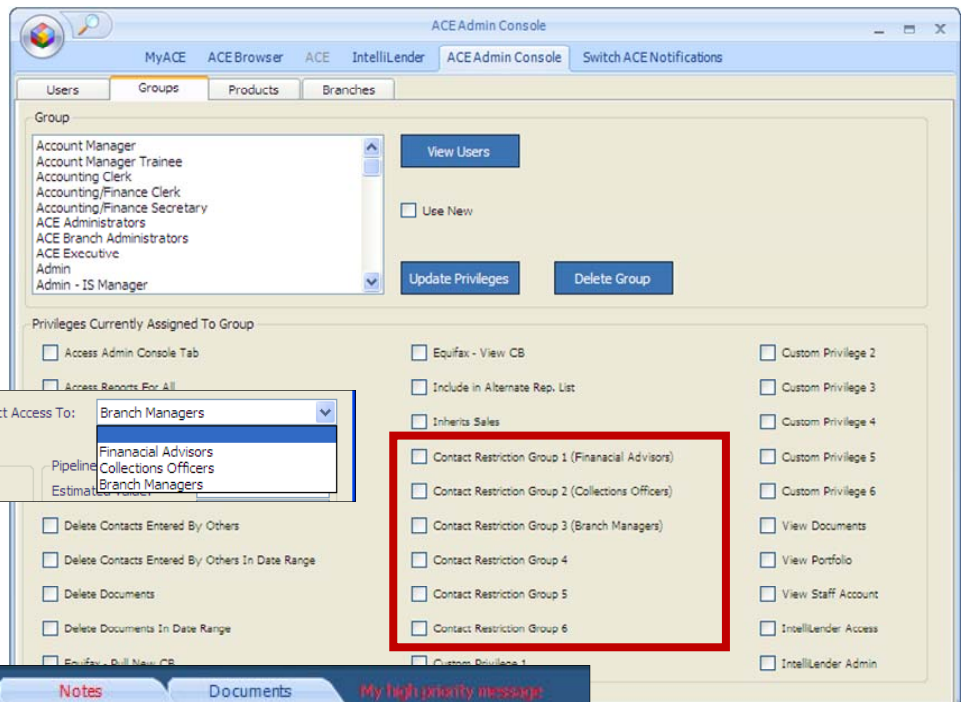
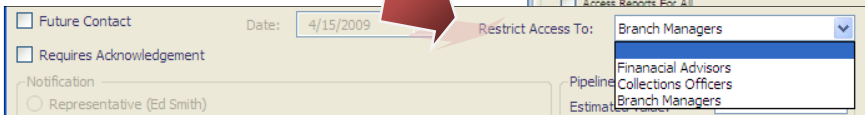
You've received this communication because you're a leader at a credit union that is part of the family of users of Neocog software, especially ACE. Over the past few years, many new features have been added to ACE. We want to tell you about them if you haven't heard, remind you if you've forgotten, and clarify what you may have been left uncertain about. If there are other staff at your credit union who could benefit from this publication as a means of keeping up to date, please send an email addressed to info@neocog.com.

Ability to Restrict Contacts to Specific Groups

A New field has been added to the Add Contact form which allows users to select whether they want the contents of a contact to be restricted to be viewed by a certain group in the organization. This functionality was added because a number of our clients have dually employed mutual fund representatives in their financial planning departments. Credential has specific privacy rules which prohibit their representatives from recording information in an enterprise CRM that is visible to the entire organization. This enhancement gives credit unions the ability to set up to 6 different Contact Restriction groups within their organization so that contacts generated for that group could only be viewed by that group.

A new Groups tab (shown right) has been created in the ACE Admin Console which allows organizations to set up to 6 different Contact restriction groups. This is where access to other functionality including Equifax and viewing staff accounts is managed.

When adding a contact users who belong to these Contact Restriction Groups will have access to restrict access to the contact they are adding as shown below.



For users not part of that Contact Restriction Group, the contact will be shown as follows:



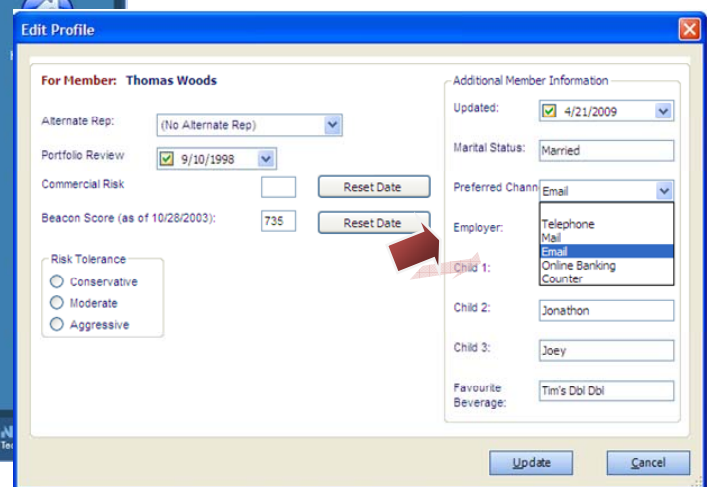
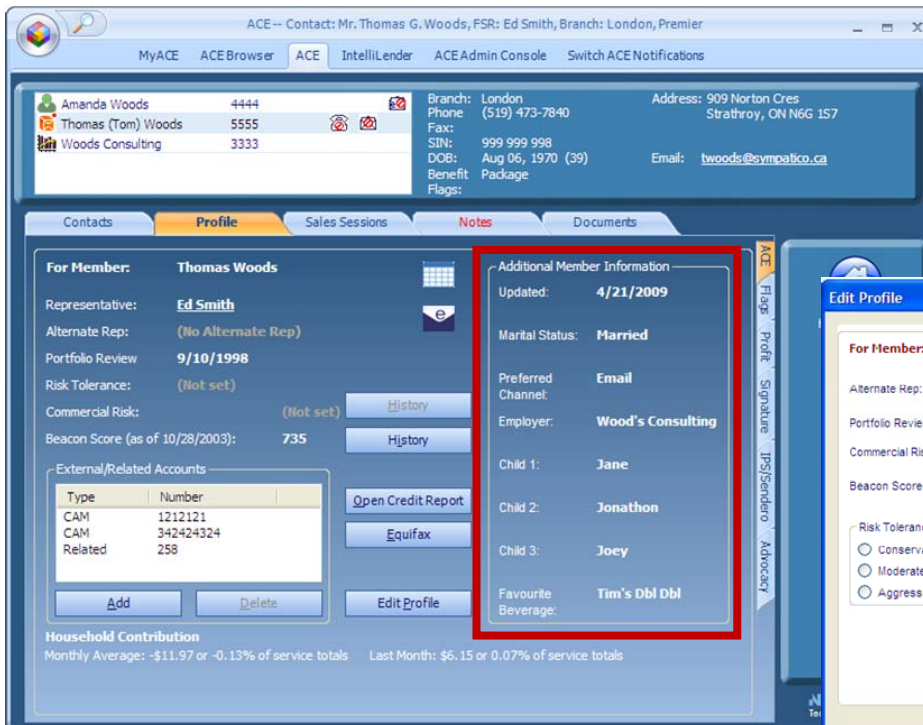
Customizable “Financial Planning” Fields

In speaking with our clients we discovered that the majority of credit unions were not utilizing the “Financial Planning” Area in the Profile Tab. After consultations with existing clients and potential clients Neocog felt that this area could be better utilized if it were made completely customizable. Through simple ACE.xml settings, this area can be become customized with drop down lists, date pickers, hyperlinks and free form fields, so that organizations can use the field to capture any information they wish. Now organizations can capture names and ages of children, marital status, employer and even their favourite beverage if you like. There are 8 custom fields to capture information your users feel is important.

Adding a Contact for Someone Else

In ACE 5.0 we added the ability to add a sale for someone else in the organization. This was significantly valuable when a staff member is on vacation and a sale closes in their absence. A colleague could then enter the sale on their behalf so they could get recognized.

After this functionality was added it was recognized that this functionality would be valuable for all contact types. Thus, as of ACE 5.1 users may now add any type of contact in ACE for another user.



Adding Associated & Related Accounts to the Portfolio View

In ACE members can only belong to one household or economic unit and previously only the accounts specifically belonging to a household were viewable in the Portfolio Summary screen. This was an issue because for instance, there might be a business account held by a partnership of 3 different credit union members. There was no way in ACE to see this important relationship. ACE has new functionality which allows associated and related accounts to be viewable in the Portfolio Summary screen as seen below. A separate field with the heading “Related Accounts” has been created and displayed at the bottom of the Portfolio Summary screen as shown below. Users are now able to enter the associated account number in the “Add External” area of the Profile tab.

