



TRIGOLDCRYSTAL EQUITY RELEASE: ACCESS VIA PROSPECTOR

EQUITY RELEASE VIA TRIGOLDCRYSTAL PROSPECTOR

The changes to TrigoldCrystal Prospector will allow you to identify those clients that are eligible for Equity Release, provide a launch point to pass client information to the online Equity Release system and pass on your client details to a Provider using the ETC module.

Accessing Equity Release from Prospector

Client List

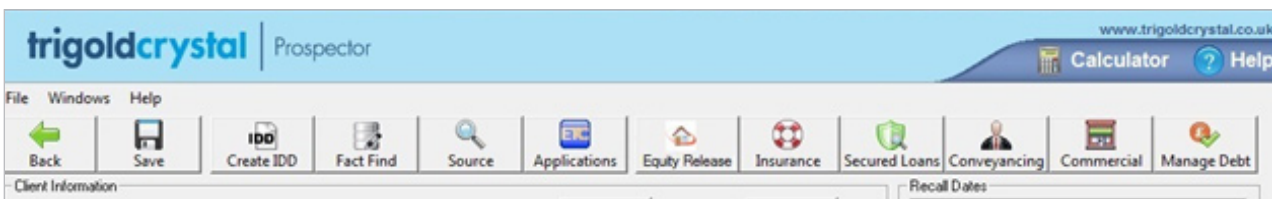
The client list in Prospector will assist you in identifying clients eligible for Equity Release products. We have added three new search filters called Town, Postcode and Minimum age to assist you in identifying those clients that are eligible. To access this feature select 'Open Client' from the main menu.

Status	Reference	Name	Created	Town	Postcode	Client 1 Age	Client 2 Age	Mortgage Recall Date	New Notes

Edit Client

After creating a new client or opening an existing client you should be now be on the Edit Client screen.

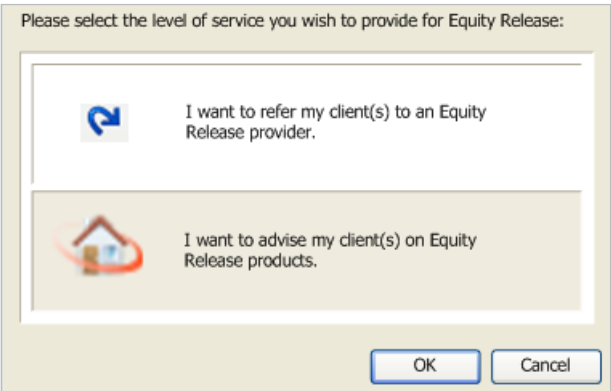
The client toolbar towards the top of the edit client screen displays the Equity Release image, once you have clicked on the image the Equity Release Service Level prompt will launch.





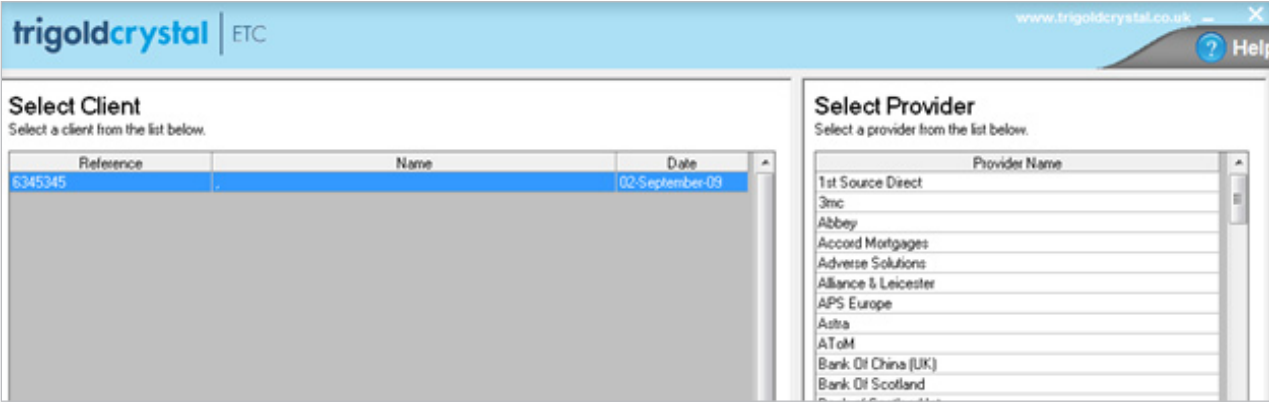
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Equity Release Service Level Prompt
The Equity Release service level prompt contains two options, one to refer the client and one to advise the client.



Clicking on the Refer option will launch the ETC screen; the Advise option will launch the Equity Release module on the TrigoldCrystal CRM platform.

The 'Refer' Option
Once you have selected the Refer option the first screen to appear will be the 'Select Client/Provider screen. Before you select the provider ensure the correct client has been selected.



The list of providers on screen will be those elected to receive Equity Release referrals. Once a provider has been selected and the 'Refer' button clicked the providers referral form will be displayed.

Complete the form and click 'Send Now' when ready to do so.



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The 'Advise' option
Once you have selected the Advise option a waiting screen will appear whilst the client's details of the selected client are being uploaded to the online TrigoldCrystal CRM system. Once this process has finished you will automatically be logged into the online system and taken to the Case Detail screen of Equity Release.