



Transvas Admin Pro

Advanced Administration Add-On



CASE AUDIT TRAIL

An advanced administration add-on that allows you to create a detailed audit trail of your pension transfer analysis report production. Keep everything in one place including scheme information requests, replies to your queries and case specific documentation.



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KEY ADMIN FEATURES

TIME STAMPED

Log all case related communications displaying the time and date they were conducted. This provides you with a time stamped audit trail of all actions you have taken to progress your report production. For example, when you requested the member's CETV.

IMPORTANT CASE NOTES

Add bespoke notes to each case as and when required. A perfect solution to ensure vital information relating to a case is logged for future reference. For example, these are perfect to store telephone notes and correspondence summaries.

DRAG AND DROP

Ability to add any relevant documentation to Transvas using simple 'drag and drop' functionality, showing the time and date this was received. Therefore, you will be able to drop in case related emails from the scheme and the client, as well as correspondence received.

LARGE STORAGE CAPACITY

Each add-on allows you to add thousands of documents including emails and case correspondence with 5gb of storage available. If more storage is required, additional add-ons can be purchased.