

## What They Wanted

The current LoanExpress™ System enabled Mortgage Find to accurately and efficiently manage Loan submission and commission payments from lenders to consultants and referral sources.

However, the next version of the system needed to provide more self service facilities for the consultants, to free up administration staff from consultant queries. It also needed to provide a simpler process for creating new loans, managing clients, and updating loan information during the approval process.

Administration staff members were also required a document management solution that integrated with their existing Microsoft SQL Server loan database; to ensure the latest version of critical product information documents were always available.

## Solution Provided

Initially, documents were migrated into a document library within Microsoft Windows SharePoint Services, to provide a logical and easy to use storage platform.

A secure online ASP.Net application was then developed to provide a single point of access for consultants to access specific loan and client data from Mortgage Find's line of business system in Microsoft SQL Server. This made document submission and retrieval much easier.

A simple to use interface, designed to be consistent with the company's corporate image, was created. This interface presents complete client and loan information to the consultant whilst managing background services that enable the correct filing and retrieval of loan documents within Windows SharePoint Services.

## Technologies Used

The following technologies were used to develop and host the Consultant Portal web application:

- Microsoft Windows Server 2003
- Microsoft Windows SharePoint Services
- Microsoft SQL Server 2000
- Internet Explorer

Development Tools and Technologies

- Microsoft Visual Studio .Net 2003
- Microsoft SharePoint Web Services
- ASP.Net
- ADO.Net
- SOAP

## Outcome

The benefits obtained to Mortgage Find are three-fold.

Managers and administration staff now have an easy to use document management system and need to respond to fewer consultant service requests, saving time.

Consultants have direct access to their client and loan information. Loan documents can now be easily retrieved without a need to know how document management systems work – especially great for new consultants.

Setting up new consultants on the system is performed centrally at the server, without the need to configure remote PCs or laptops, removing any compatibility issues.

For more information on this system, please contact Dragonfly Software on +61 8 8410 8889 or email us at [info@dragonflysoftware.com.au](mailto:info@dragonflysoftware.com.au).

