

Service Definitions Document

The Fast Online Referral Tracking (FORT) system allows agencies to refer clients to each other through a cloud-based portal. The system also offers a multi-partner CRM function for the secure exchange of non-referral information.

Definitions

An instance of FORT. – FORT is A CRM platform that has an optional integrated referral system. A FORT Instance includes one or more CRM and the option of the integrated referral system.

CRM- A walled dataset on FORT that can be accessed by one or more agencies (and their users) on the FORT system.

Referral System. – A system on FORT that allows for the secure electronic referral of a client between two agencies using the FORT system.

FORT User – A person with a unique username authorised by the buyer or a buyer delegated agency to have access to the FORT system.

Referral System Agency – A service / agency with a unique agency id on the FORT system

Texter Install. – A system for allowing Texts to be sent from and received by a CRM client record.

Standard Letter Template – A system for producing client letters from a CRM client records.

Hub Design - A hub is bespoke tool for interrogating and filtering live client data on a FORT CRM.

Money Advice Module Install. The money advice module is a tool for generating Financial Statements and budgeting information on a FORT CRM.