A WORKSPACE FOR FINANCIAL INTERMEDIARIES

GoldVea

From the first conversation to a contract and commission.

Clients, products and your team
in one workspace.



Less time searching through documents.
More time with your clients.

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WHY GoldVea

Clients, advisers and the company work on the same case.

The provider prepares the product, the adviser handles it with the client, and the business needs to keep track of contracts and rewards.

When each part of the job has its own table, people repeatedly submit the same data. GoldVea combines products, calculations, clients and contractual documents into one environment. Everyone works in it with a part that belongs to their role and authority.

Provider and brokerage firm

They will prepare products, calculators, documents and cooperation rules. They manage partners, team and commission settings.

Consultant and client

They review the client's needs, compare the prepared variants and work with specific documents. The client can return to the assigned data in his portfolio.

Keep information with the case it belongs to

You can find assigned calculators and contract status at the client. For a product, you work with its version, inputs, and rules. When settling the commission, one can go to the detailed items.

Common procedures for the entire company

The administrator sets up catalogues, templates and access permissions. Advisers then work from the same starting point, and the client receives documents they can return to later.

> Practical result
> When a client calls after a few months, you can find their case and continue from the existing data. You don't have to start by searching your emails for the latest version.

ORGANISATION AND ACCESS

Your team has its own structure and responsibilities.

Branches, units, managers and advisers can be arranged to fit your business operations.



The organization tree will show who belongs where

In the organizational structure, you can see the units and their classification. With people, you can work with details and links to the relevant part of the company. It helps with network management and orientation in a larger team.

Access is allocated by role

Admin, Team Member and Client have different options. In catalogs and cooperation with partners, it is also set which documents are available to whom. You can thus adapt the scope of work to a specific role.

Structure also matters when it comes to rewards

Team breakdown is also used in internal compensation reports. When assessing the result, you can distinguish between the agent's direct remuneration, the manager's remuneration and the company's share.

> ### When the team grows
> Place a new adviser in the appropriate part of the organisation and set up their access permissions. Everyone can refer to the same organisational structure.

CLIENTS AND THEIR CASES

You can find more than a phone number with a client.

The list of clients links basic information with assigned calculators, questionnaires and contractual documents.

When working with a client, it's important to remember what you've been through together. In GoldVea, you open a client detail and see its information and linked cases. According to the selected report, you will get to the calculation, answers or document.

What are you looking for?	Where the client detail will help you
Contact and basic information	Information about a specific client.
Draft in progress	Associated calculators and saved variants.
Contract status	Resolution without contract, unsigned or signed by the client.
Client responses	Summary of the questionnaire for the relevant case.
Payments	A related overview of expected and recorded payments.

You search for the person and continue on their topic

You can filter the list and open the selected client. With the associated calculators, the signature status can be distinguished, so you can more easily find cases that still need the next step.

The documents do not have to stay only with the adviser

The assigned case can also be displayed to the client in their part of the system. The adviser and the client can then talk about the same proposal and the same documents.

> For example, during subsequent service
> The client will ask about the agreed payment. You open his case, view the contract documents and the corresponding payment overview. You solve the question with a specific record.

PRODUCTS AND CATALOGS

You prepare the products once and make them available to the right people.

The catalog organizes the offer by groups, providers and access rules.



A clear offer according to your company

You can classify products into groups and subgroups. The user then selects the relevant area and opens the available product. With it, he finds the ready inputs and outputs of the given calculator.

The version is also important

Calculators have their own versions. When the product setting changes, you can tell which version is being worked with. This makes it easier to talk about the same calculation rules in a specific case.

Not all inputs need to be changed by everyone

The author of the calculator can lock some values and leave others for addition. The prepared product rules will thus remain different from the data that the adviser enters for a specific client.

> ### A practical advantage for the network of advisers
> For a new product, you prepare a common ground and determine availability. The adviser knows where to find it and which data to add to the client.

CREATION OF CALCULATORS

You prepare the calculation according to your product.

Inputs, formulas and outputs can be assembled in one tool and saved as a usable calculator.



You start with a template or your own design

Templates are available for various areas, such as savings, loans or insurance. With available AI assistance, you can also have a template design prepared. You then modify the inputs and rules and verify the calculation against your own product.

You determine what is entered and what is calculated

An input can be an amount, period, or other parameter. Formulas will generate results from them and you will choose which outputs to display. The calculator also knows the currency in which it works with the corresponding values.

The calculation should be comprehensible to another person

You name the inputs and results so that the adviser can navigate them. The prepared model can then be used repeatedly with different clients, with their own data.

> What will you gain from it?
> Business process will stop depending on one private table. The team can work with a ready-made calculator and its specific version.

SCENARIOS AND QUESTIONNAIRES

You show the client what will change with a different setting.

During the discussion, you can prepare several variants and compare their results on the same basis.

The client may ask what a different monthly amount, a longer period or a different combination of parameters means. Instead of overwriting a single value without a trace, you can work with scenarios and step through them together.

Variants of calculation

You can distinguish individual settings and their graphic or numerical outputs. Can you explain which inputs made the difference.

Answers and summary

You can work with questionnaire data where appropriate. The summary will help you go back to the answers that the discussion was based on.

You assign the scenario to a specific client

The design doesn't have to end when the window closes. The assigned calculators and their settings can be found with the client and in his portfolio according to available authorizations.

You can follow up at the next meeting

You open an existing case, see the answers, and go through the original variants. If the needs have changed, you have a base from which to start when editing.

> The calculation is the basis for the explanation
> Results depend on the assumptions entered and the product rules. The adviser explains their meaning; a chart alone does not establish a future return or make a product suitable for every client.

DOCUMENTS AND CONTRACTS

You can go from the proposal to specific documents.

Contract templates and document packages follow the prepared product and client case.



You will prepare the content and pages of the document

In creating contracts, you work with the pages and content of the document. With available AI assistance, you can also import an existing file and edit the result. You assign the prepared documents to the product for further use.

You see the related documents before confirming

The contract reader allows you to go through the attached parts. Before the signature step, the system may also require filling in the relevant answers. The user confirms a specific package, not just a general choice of product name.

The status and saved form can be found with the case

The application differentiates the confirmation of the client and other participants according to the prepared procedure. For a signed package, it works with stored documents and dates. Print and export options are also available.

> ### Proceed according to your documents
> As we roll out, we'll go over the content, mandatory questions, and confirmation method. The process will be set according to the specific contract and your requirements.

MY PORTFOLIO AND PAYMENTS

The client can access both the proposal and the contract in their account.

In the portfolio, he can see the assigned products and calculators, their status and related documents.

After the meeting, there are often other questions: what did we agree, what document still needs to be confirmed and where does the payment belong? A client portfolio provides a place to refer back to an assigned case.

Part of the portfolio	Which will help the client to find
Associated products	Case name, version, and related settings.
Scenarios and graphs	Outputs from prepared variants.
Questionnaire	Summary of relevant responses.
Contracts	Attached documents and signature status.
Payment instructions	Payment details and reference, if available for the product.
Payment overview	Expected, missing and recorded payments according to available records.

Review due dates and payments by period

For related records, you can find a monthly or yearly view. You can thus distinguish expected payments from recorded payments and find the period to which the question applies.

Some steps depend on the product setup

The portfolio also distinguishes the status of the contract and, in supported cases, allows to request its cancellation according to a prepared rule. The range of options depends on the specific product.

> A payment instruction is information about payment
> The client makes the bank payment in his banking. Viewing instructions does not in itself mean sending or crediting money.

COMMISSION RULES AND SETTLEMENT

The reward has its basis, rate and term.

GoldVea allows you to prepare commission templates and then browse the details of related settlements.



You prepare the rule according to the agreement

The commission can use a percentage rate or a fixed amount. You can also choose a plan: one-time, from each payment, monthly or annually. You name the template and edit or copy it as needed.

Provider and broker have their own view

In the settlement overview, you can work from the relevant side of the collaboration and filter records. After selecting a settlement, you open its detailed items.

You can ask about the specific reason for the amount

Instead of a result number sent separately, you have rules and related lines. When checking, you can go through which items the report is based on and which period it belongs to.

> When a trade agreement changes
> You edit the relevant commission template and verify its use on the product. The team then has a named rule to refer back to.

INTERNAL REWARDS

Differentiate between the remuneration of the adviser, the manager and the company.

After the commission from the partner comes the question of how, according to your rules, the result will be distributed inside the organization.

Internal rewards link insight to organizational structure. You can assess a specific period, summary and detail of individual parts of the team. So you don't have to talk about just one common amount when checking.

Overview area	What do you distinguish in it?
Agents	Direct commissions assigned to relevant people.
Leader	Rewards based on the organization tree.
Company share	Part of the result led for the company.
Summary of the period	Total values for the selected time.
Unit detail	Items and distribution in the relevant part of the organization.

From the summary to the specific part of the team

In the organizational view, you select a unit and open its detail. When asking about the result of a department or branch, you can focus on the relevant group.

The rules must correspond to real cooperation

As we roll out, we'll go over onboarding people, compensation, and periods. You can then verify the resulting reports on a known situation from your company.

> ### A practical advantage when checking
> Leaders and administration can go through the same review in the same period. They will more easily agree on which item needs to be explained or checked.

PARTNERS AND ONBOARDING

Collaboration begins with setting up access.

Partners, groups, and engagement requests will help you stay on top of things even as you grow your business.

Partners and groups

You lead collaborative organizations and group members. For the available documents, you determine the scope of disclosure according to the specific cooperation.

New team member

Submit a request with your name, personal email and required company email. An administrator has a request in a shared report.

Keep applications in a structured process, rather than a standalone email

Onboarding means accepting a new person into the corporate environment. In the overview, you can distinguish between pending, completed and rejected applications. For each, associated data and notes remain.

The administrator completes the necessary steps

Processes the request for the company mailbox and indicates its status. The app also supports completion notification. Simply sending the request does not mean that the mailbox has already been created.

You will make the products available according to the partnership

The provider does not have to share all documents equally. Permissions in the catalog and partner groups will allow availability to be prepared for specific relationships.

> ### When a new branch or partner is added
> You will enroll the people and the organization, prepare the necessary requests and verify access to the products. Each of these things has its place in the system.

COMPANY PRESENTATION

You will also introduce the company to people outside the system.

GoldVea also includes tools to manage the company's content, contacts and public presentation.



Content according to your brand

You will prepare company information, contacts and visual materials. The public part can work with your organization's content to get the visitor to the right information and contact options.

Articles, branches and social media links

You manage blog posts and categories, branch data or links to social networks. Branches can also be displayed on the map. With content modules, you distinguish between preparation and publication according to the available settings.

Also space for new job opportunities

In the career section, you will prepare an offer, place of work, conditions and application method. You distinguish between a work-in-progress and a published offer. The development of the team can also be linked to the public presentation of the company.

> A practical advantage for a smaller company
> You have basic work tools and corporate content management in one environment. At launch, you choose which parts you want to use and publish.

LINKS AND DATA

When a calculation needs data from another source.

The GoldVea has tools for selected links over the LinkVea and adjustable transfer points.



You agree on what data is to be transmitted

Endpoint is a specific place through which programs transfer agreed data. In the relevant report, you can distinguish between your own transmission locations and those that are made available to you.

Selected inputs can be based on a link

Input settings from LinkVea are available in the calculator build. The resource and item to load, as well as the refresh interval, are specified. The connection can be tested during preparation.

Match the technical setup to a specific business need

First agree which data is needed and who supplies it. The administrator then prepares access permissions, the source structure and how it will be used. The aim is to bring the agreed input into the calculation without repeated manual entry.

> ### Not every connection will arise by itself
> For a specific system, the available interface, authorizations and correctness of data are verified. The scope of the connection will be agreed according to what your company needs.

SETTINGS, SUBSCRIPTIONS AND SUPPORT

The company will prepare its own environment.

Organizational rules, content and access are set according to how you want to use GoldVea.

Users work according to their tasks

The administrator prepares the company and documents, the team member solves the assigned work, and the client uses his own part. Available roles and permissions are respected for individual modules.

Personal settings

The language, appearance and layout of the environment can be customized by the user according to the available options. The interface supports Slovak, Czech, English and German.

Corporate administration

You maintain organization settings and content in the appropriate sections. You can thus distinguish the personal choice of the user from the rule of the entire company.

Subscription and invoice overview

In the invoicing section, you can find the subscription status, the relevant period and available invoices or payments. You can agree on a specific package and scope of service according to the current offer.

You can resolve the issue through support

The system includes support communication with threads and messages. For a problem, you can give a specific case or procedure where you encountered it.

> Easier when submitting work
> The administrator knows which documents he is preparing for the company, the adviser knows what he is working with for the client, and support receives a specific description of the question.

EXAMPLE OF WORK PROCEDURE

What can one client case look like?

In the example, you can see where the product, client and contract are being worked on. You will prepare specific procedures according to your company.

Step	What's happening in GoldVea
1. Preparation	The provider will prepare the product, calculator, documents and rules.
2. Discussion	The adviser opens the client and fills in the necessary data.
3. Variants	He goes through the calculations with the client and compares the prepared scenarios.
4. Assignment	He assigns a specific proposal to the client.
5. Documents	Participants will go through the relevant documents and the prepared signature procedure.
6. Further work	The client returns to the portfolio; the adviser monitors the status and payment documents.
7. Rewards	The firm is going through commission settlements and internal rewards.

The documents will remain for a specific case

The calculation is product and version specific. The assigned case belongs to the client. Both documents and confirmation status can be found for this case. They can be returned to later during service.

The team works with the same names and rules

When the provider, adviser and administration are talking about the same product or case, it is easier to clarify the question and find the necessary detail.

> What we will check in the demonstration
> We'll pick one of your products and go through its journey from preparation to client conversation to documents and rewards.

INTRODUCTION TO THE COMPANY

Start with one product and a small team.

A specific case will best show which modules and rules you need to prepare first.

Area	Let's figure it out together
People	Who makes products, who works with clients and who manages the business.
Products	Which calculators, inputs, versions and outputs do you need.
Documents	What documents belong to the product and how the confirmation should take place.
Rewards	How affiliate commissions and internal splits are set up.
Existing data	What do you want to take over from the existing records and in what quality?
Using	Which accesses, reports, and public parts should be available.

We will verify the calculation and the entire procedure

We will prepare a well-known example and compare the result with how you solve it today. We'll also go over document status, the client view, and the rewards that go with it.

You can expand the range gradually

After you validate your first product, you involve more people, catalogs, and policies. Both the transfer of existing data and new connections will be prepared according to their availability and the needs of the company.

For both new and existing companies

The new company will create a common working basis. The existing one can choose the part of the process where the submission and checking of documents takes up most of her time today.

> To the first meeting
> A product demo, existing calculation, sample documents and a brief description of the commission rules will help. A significant part of the GoldVea options can be explained on them.

LET'S CONNECT

See how GoldVea could fit your company's workflow.

We'll go over one of your products, a client case, and the steps you need to keep in check today.



Are you building a new network or changing the current system?

We will look at the team, catalogs, calculators and documents. We will select the parts that make sense to prepare first so that you can evaluate them on your own example.

Do you need to better connect business and administration?

We will show the client detail, portfolio, contractual procedure and reward overviews. Together we will go through where today's work with documents can be simplified.

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