



## Tracker<sup>®</sup>PRO Advantages

Tracker PRO, Ryan's most recent and advanced unclaimed property reporting system, offers a host of differentiators from TRACKER and any competing systems.

### File Mapping

- File mappings are created in a one-step process instead of a two-step process.
- A single file mapping can be used for import and export.
- File mapping allows you to select whether or not to exclude commas and decimals during import.

### Security

- Tracker PRO provides our clients the ability to encrypt data "at rest."
- Users are not assigned permissions directly, but acquire them through roles. Management of individual user rights becomes a matter of simply assigning the appropriate role.
- Password security settings are enhanced to meet strict security guidelines.

### Import Data

- Staging tables hold records that do not pass major validation checks, allowing you to review imported records and fix them before they import into the live database.
- Offers an unlimited number of User Defined fields instead of limiting you to just 16 fields.
- Holder information can be imported.
- Tracker PRO has the ability to import an XML file.
- Import Report shows failures and data validation problems. Problem records show at the top of the report instead of interspersed throughout the report.
- Import Report shows multiple line numbers listed together for a property (so if one owner is on line 5 and one is on line 1050, they are listed together on the report).
- Import accepts punctuation.

### Owner Notification

- Due diligence letters can be run across multiple holders.
- Users have the ability to manually enter barcode numbers, if they are unable to scan the barcode.
- Insert fields are highlighted in yellow on all letter templates.
- Tables can be added to letter templates to make the letters look more professional.

## Property

- Forecast dormancy is automatically calculated. No additional steps are needed to calculate or recalculate property dormancy.
- Tracker PRO allows users the ability to add any number of adjustments (additions/ deductions/deletions) for all property types. Users are not restricted from entering multiple adjustment amounts and codes within the Tracker PRO database.
- Owner information for owners with multiple properties is only listed once instead of for each property. For example, if a single owner has ten properties, the owner information is only listed once, and all properties are tied to the owner.
- Manual purge to history is not required. Property is now designated as “active” or “inactive.”
- Many data fields of an inactive record are uneditable to prevent erroneous changes to previously reported records.
- Punctuation within the owner name and address will be allowed in the database and will appear on due diligence letters. Tracker PRO will remove punctuation on state reports per the National Association of Unclaimed Property Administrators (NAUPA) requirements.

## Reports

- All reports, including Internal Reports, can be easily exported into Excel.

## Usability

- User can run multiple processes at the same time. For example, an import can be started, and the Tracker PRO user can work on anything else within the system while the import is processing.
- Printer settings can be changed whenever needed instead of only at certain times.
- Column order on property and dormancy lists can be adjusted by simply dragging and dropping the column to a new location.
- Additional search and criteria options have been added to better pinpoint specific data.

## Miscellaneous

- Tracker PRO can be hosted without the use of Citrix.
- Tracker PRO has additional validations and data consistency checks.
- Changes can be made by the user to override previously non-customizable settings such as the threshold for detailing owner information on electronic escheat reports.

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