



Client and Task Tracking System (CATTS)

A CRM and Task Tracking System

A WEB-BASED ORGANIZATIONAL TOOL BUILT FOR THE RETIREMENT PLAN PROFESSIONAL

ASC offers two complementary CRM/Tracking Systems: CATTS (Client and Task Management System) and PensionPal. Both track your clients, contacts, associated Brokers, Sales Agents, Accountants, have employee level security restrictions and can provide plan information with the click of a mouse. In addition to implementation assistance and ongoing support from ASC's terrific and experienced support staff, both systems offer customizable workflow and task management fields, on-demand or scheduled reports, and letter or e-mail merge capabilities. Contact ASC Sales at sales@asc-net.com or (800) 950-2082 x1 to discuss and find the perfect solution for your business needs.

We designed our web-based Client and Task Tracking System (CATTS) under the same premise as our industry acclaimed web-based Document Generation & Management (DGEM) System with a heavy focus on the integration of plan document and 5500 data stored in the DGEM system. This "real-time" data flow allows you and your staff the ability to see an up-to-date and comprehensive picture of your clients, contacts and plan information.

ACCESSIBLE AND VISIBLE:

All in one place – clients, cases & contacts plus the option to individualize with unlimited custom fields

At a glance views of your filing deadlines, events, tasks and staff schedules

Create and generate a variety of reports on demand or create reports to generate and deliver to users on a regular schedule

Track annual or daily workflow with Case or Company projects and staff role assigned tasks

Manage case workflow by converting internal checklists to customized project templates or utilize generic project templates

Prepare customized letters, emails & forms using plan document, 5500, ASC Compliance and custom data fields.

Home Companies Cases Contacts Reports Projects Forms

Welcome: CATTS Manager

CALENDAR FOR CATTS Manager

Name	Associated With	Action
Monday 07/16/2018		
8:00AM- 9:00AM		
TASK DUE	File Final Form 5500	ASC Val to CATTS Compliance Edit Del Complete Skip
Tuesday 07/17/2018		

Showing 2 Days | See 1 Week | See 2 Weeks

EVENTS FOR CATTS Manager

Scheduled	Name	Associated With	Action
7/16/2018 08:00 AM	Weekly Staff Meeting		Edit Del

View More Events

TASKS FOR CATTS Manager

Due Date	Name	Project	Associated With	Action
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Manage Reports

NON SCHEDULED REPORTS

Report Name	Report Type	Action
2017 5500 Tracking	Case	Run Now Schedule Edit Del

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Manage Projects

NON SCHEDULED PROJECTS

Project Name	Related to	Action
403(b) Retirement Project	Case	Schedule Edit Del
Fund Company Files	Case	Schedule Edit Del
QDRO - Plan Participant	User	Schedule Edit Del

SCHEDULED PROJECTS

Project Name	# Active	Selection Criteria	Scheduling Date	Expiration Date	Action
Annual Client Meeting	6	Demo Companies	8/31/2016	8/31/2020	Edit Stop Project
John Doe QDRO - ABC Widget	1		6/13/2018	6/13/2018	Edit Stop Project
New Business On-Boarding	1	Selected Cases	6/12/2018	6/12/2019	Edit Stop Project
Plan Termination	3	Selected Cases	6/13/2018	6/13/2037	Edit Stop Project
Project Compliance	10	2016	Annually on April 3	4/3/2020	Edit Stop Project

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Forms

Document Link	Company Name
ABC Manufacturing 401(k) Plan	ABC Manufacturing
ABC Widget Company 401(k)	ABC Widget Company
Actuarial Systems Corporation	ASC Val to CATTS Compliance
ASC Val to CATTS Compliance	ASC Val to CATTS Compliance
Brown Inc 401K	BROWN POWER INC.
Burgers and Brats Grill & Bar 401(k)	Burgers and Brats Grill & Bar
Emergency Care Clinic 401(k)	Emergency Care Clinic
Employee Retirement, Inc. 401(k)	Employee Retirement
Employee Retirement, Inc. 401(k)	Hometown Laboratories, Inc.
Family Dentistry 401(k)	Family Dentistry
Fun Times Daycare 401(k)	Fun Times Daycare
Global Software Corporation 401(k)	Global Software Corporation
Great Plains Videos 401(k)	Great Plains Videos
Hometown Laboratories, Inc. 401(k)	Employee Retirement
Joe's Auto Mechanical 401(k) - ASC VAL	Joe's Auto Repair
Joe's Autobody 401(k) Plan	CATT Testing Case