The Key Release Version 3.0: Pre-Release Note

Contents

This document covers important information and guidance ahead of the deployment of version 3.0 of The Key, due to go live on the evening of the 6 July 2009, including:

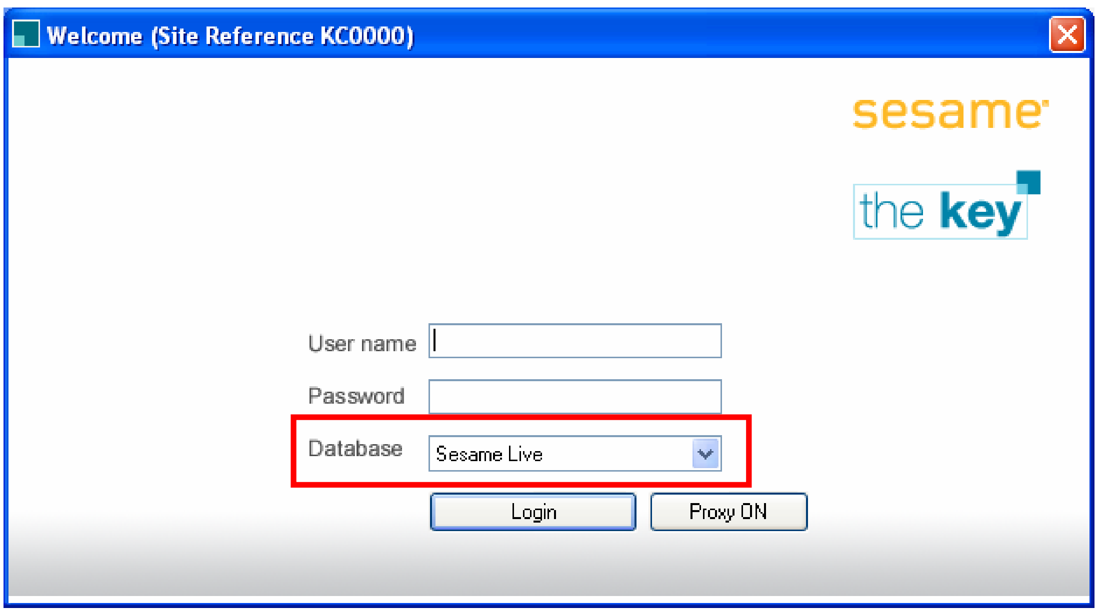
- **Synchronisation -** If you work offline then you must ensure you synchronise your clients before the new release goes live. If you do not use the offline functionality no action is required - more details
- **Sesame Web User ID -** To make use of the eNBS integration, following the release of version 3.0, all advisers are required to enter their Sesame Web User ID into The Key, - more details
- **Provider Names -** We are changing the provider field from an editable list to a drop down menu, and will be replacing provider names used with standardised names - more details

1. Synchronisation

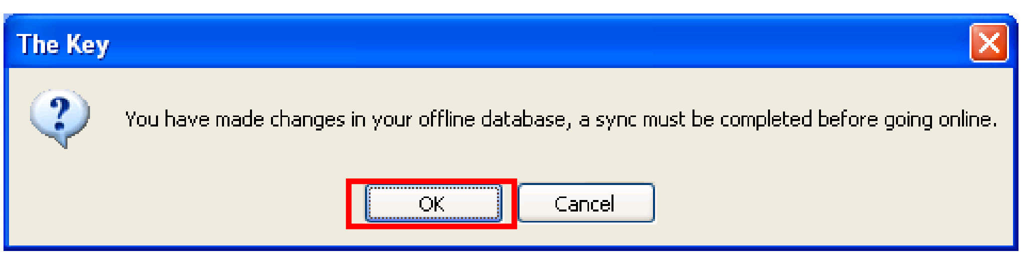
It is important that any users of the Key's offline functionality ensure that they synchronise their clients on line before **17.00** on 6 July 2009. Any client information entered offline before the new release of The Key, which is not synchronised, will likely be lost.

How do I synchronise?

Go to the log in screen. Ensure that the database is set to Sesame Live [as highlighted below] and then log into the system using your user name and password.



Once you have successfully entered your correct user name and password, you will be presented with the following message, to which you need to select "OK".



This will result in a synchronisation of your database, which will update the relevant client records.

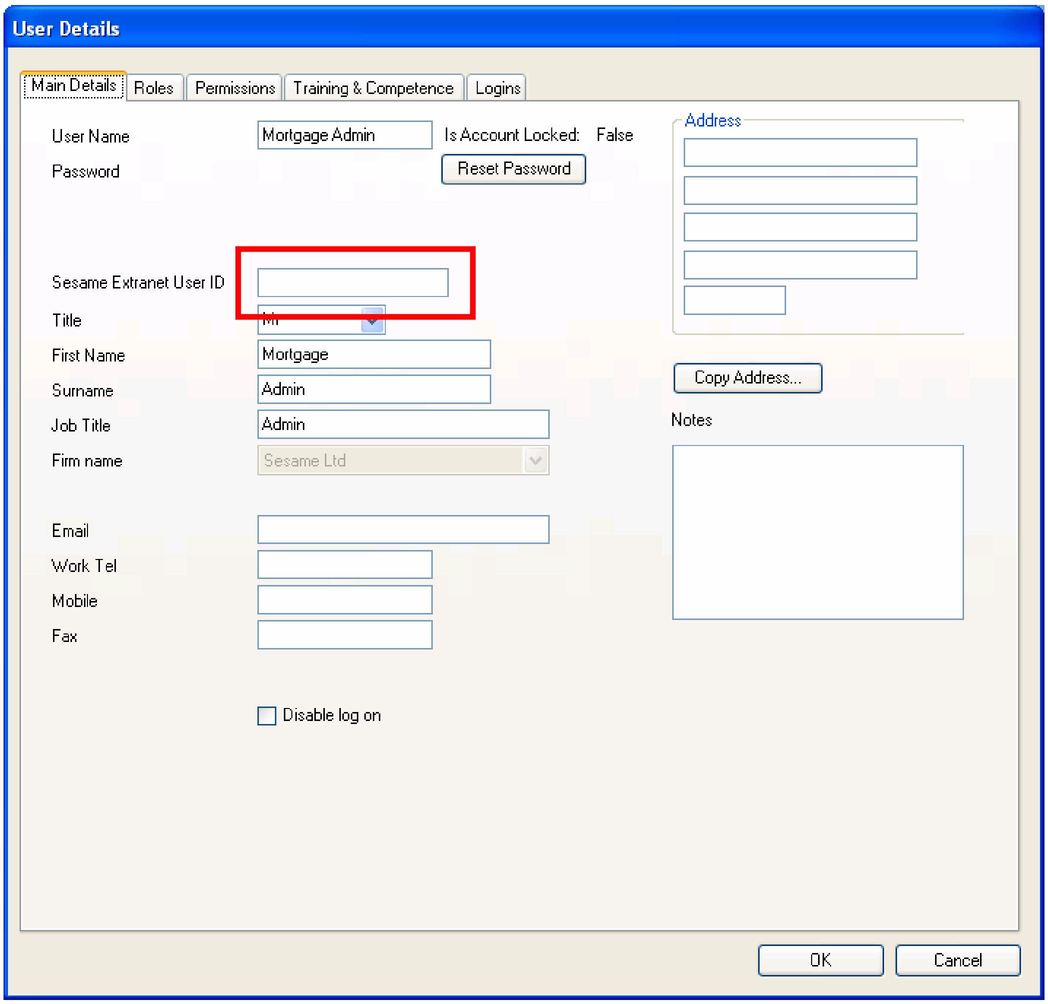
If you are not presented with the warning message to synchronise, then you don't have an offline database and therefore you don't need to undertake any activity.

2. Sesame Web User ID

To enable advisers to submit new business submission sheets from The Key, following the release on 28 July, advisers need to enter their Sesame Web User ID into the User Account details screen on the Key.

If the Web User ID is not stored in The Key then advisers will be unable to submit business via The Key. If the Extranet ID is entered incorrectly the new business submission will fail and will result in advisers having to submit business manually via the Sesame new business website.

If you do not have access to this area of the system contact your in house Systems Administrator who does have access to this area to enter the relevant details.



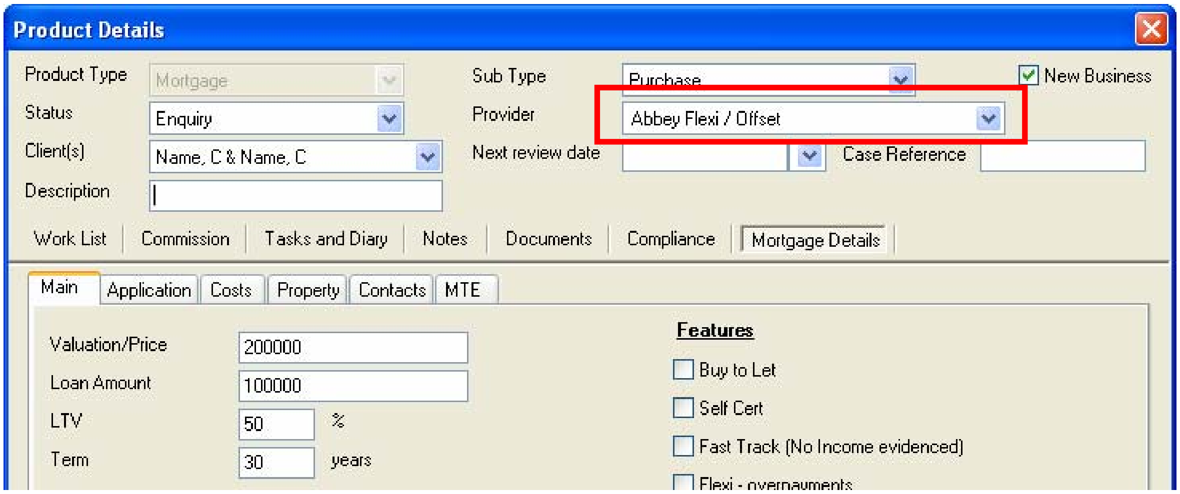
Further guidance on the User area can be found in the **User Setup** guide at http://www.thekey.uk.com/sesame_thekey.aspx

A User Guide detailing the eNBS submission process via the Key will be published prior to launch of this new functionality.

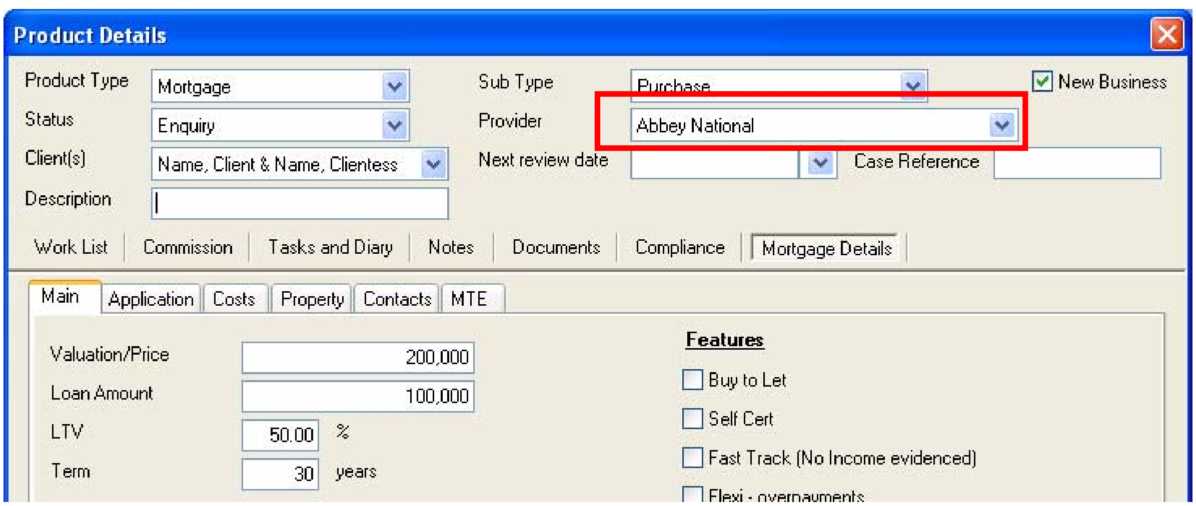
3. Provider Names

In order to support the Electronic New Business Submission (eNBS) integration due to go live later in July, we have carried out an exercise to correct and standardise the current list of Provider names held within the Key. Currently the provider and lenders fields are free text and therefore contain a large number of non-standard provider and lender names.

The Provider name field [as highlighted below] will become a fixed drop down list of providers that are recognised by Sesame systems.

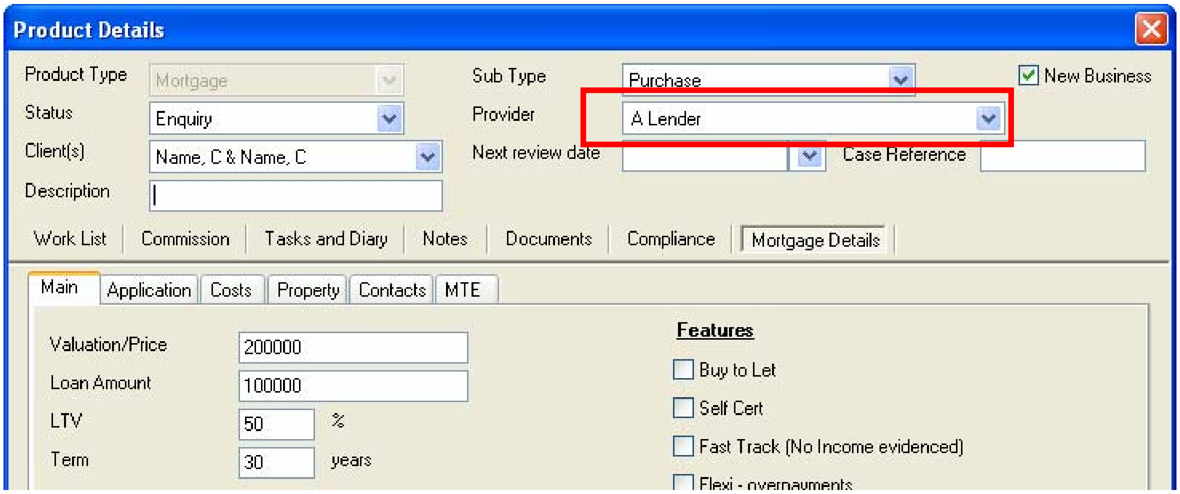


We have taken the opportunity to replace the non-standard provider names with appropriate standard descriptions. In the example above, the provider is clearly Abbey National and consequently post live, you will see the provider name corrected as detailed below:

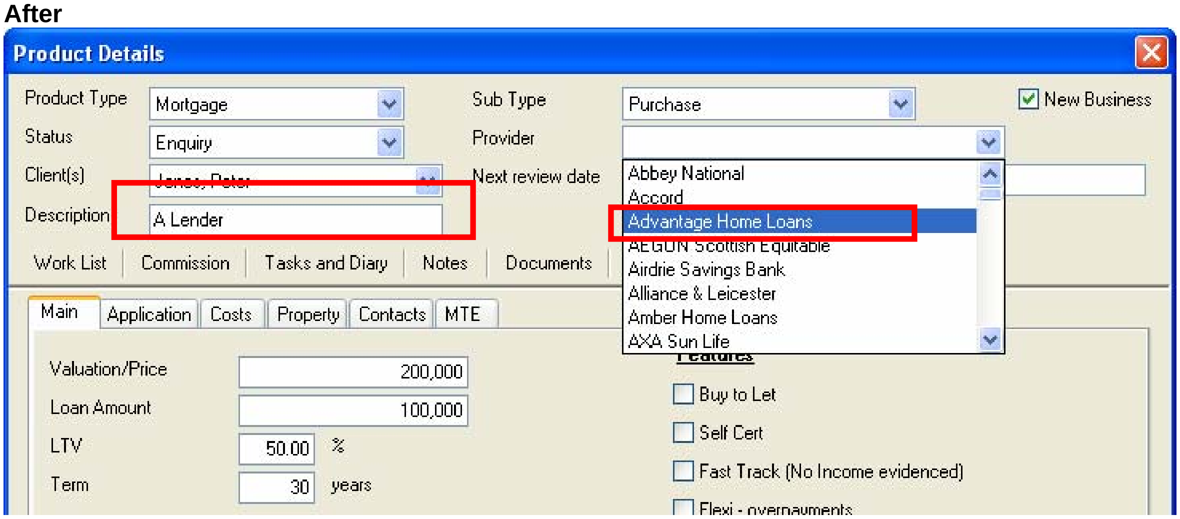


In instances where it is not possible to determine who the applicable provider is [as illustrated in the screen shot below] the provider name will be copied into the description field. The user will then have to select an appropriate lender from the drop down menu in the provider field.

Before



After



The following provider/lender fields will also be affected by these changes:

- Mortgage Fact Find > Current Mortgage > Lender
- Insurance Fact Find > Existing Plans > Provider