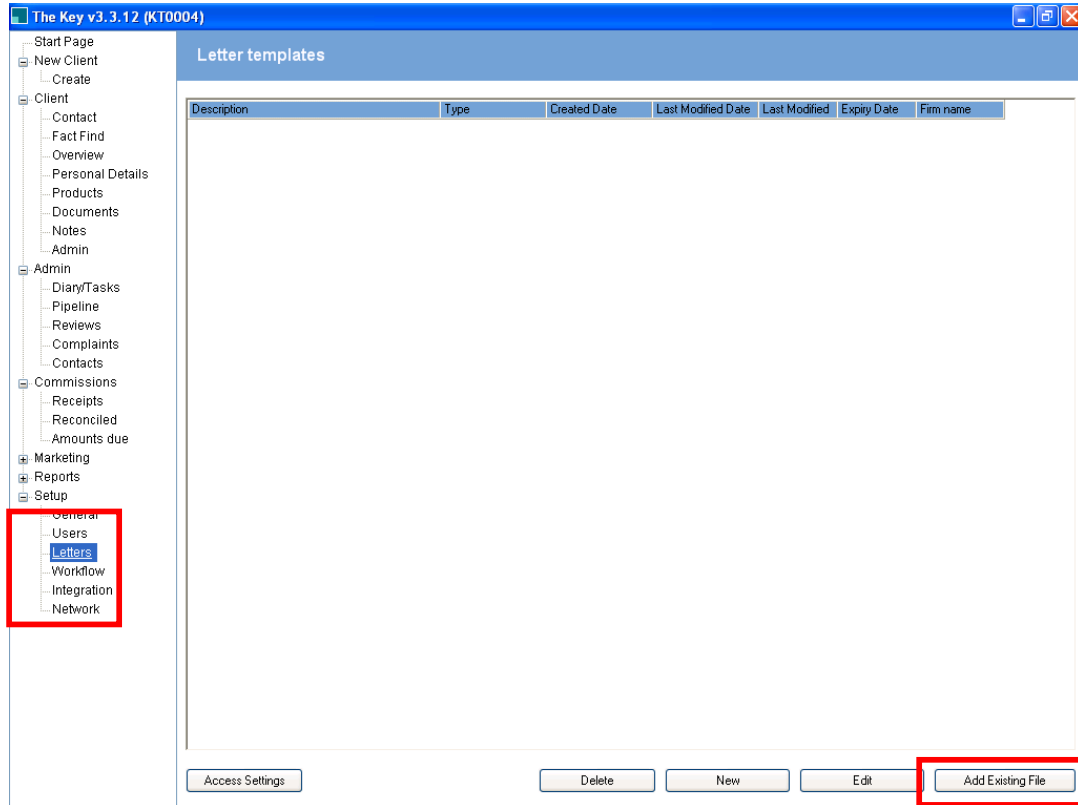


How to Add an IDD Template

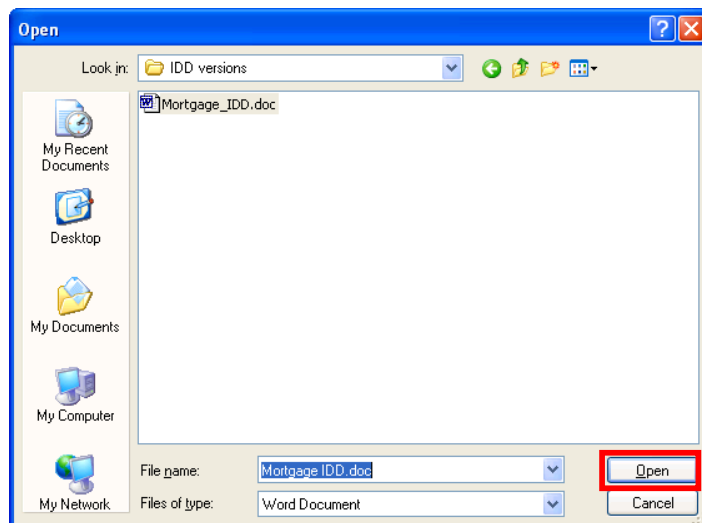
IDD templates are not centrally stored in the Key however can be added by individual firms/users.

Once an IDD template has been added into the Key this will be available to select when creating a sale and can then be easily attached to a client record within the Client > Documents area.

To add an IDD template click on **Setup > Letters**, permission to access this area is controlled through the **Setup > Users** area.

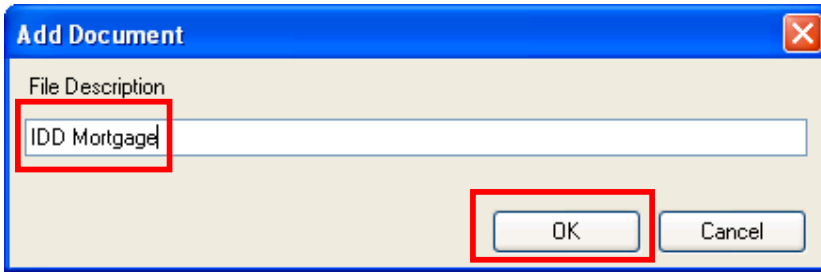


Click on **Add Existing File** which will open a windows browser where your current IDD version can be located. Highlight the required document and click on **Open**.

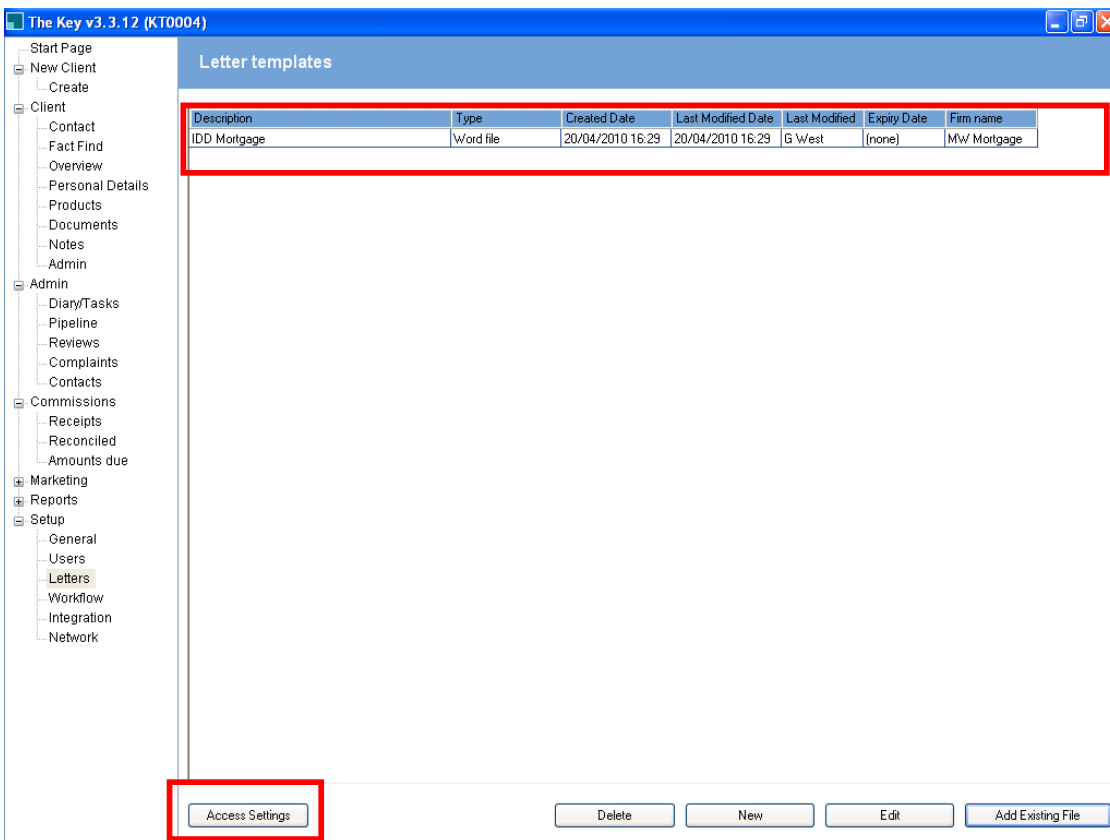


An **Add Document** box will be displayed where the document can be renamed.

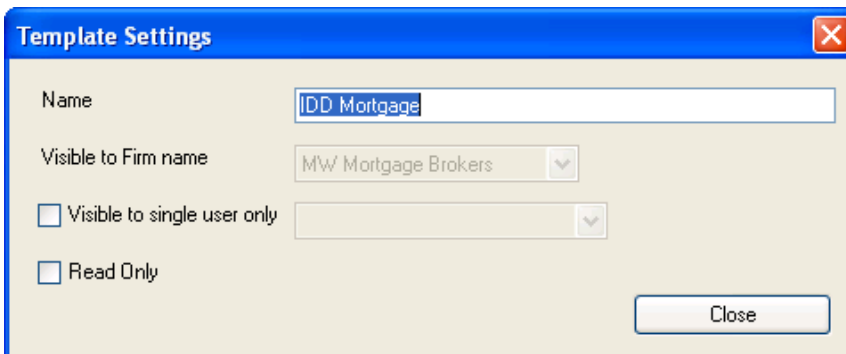
Important: The document must be renamed to begin with the letters “IDD” in order for the document to be correctly displayed within the Create IDD box on the Fact Find Summary Page.



Click **OK** to save the document. There will be a short delay between clicking **OK** and the document appearing in the **Letter Template** list.



The **Access Settings** button can be used to rename the document or to amend who is able to view the document.



Adding an IDD Template to a Sale

Click on the **Client > Fact Find** option and the Fact Find Summary screen will be displayed. Click on the **Create IDD for Sale** button.

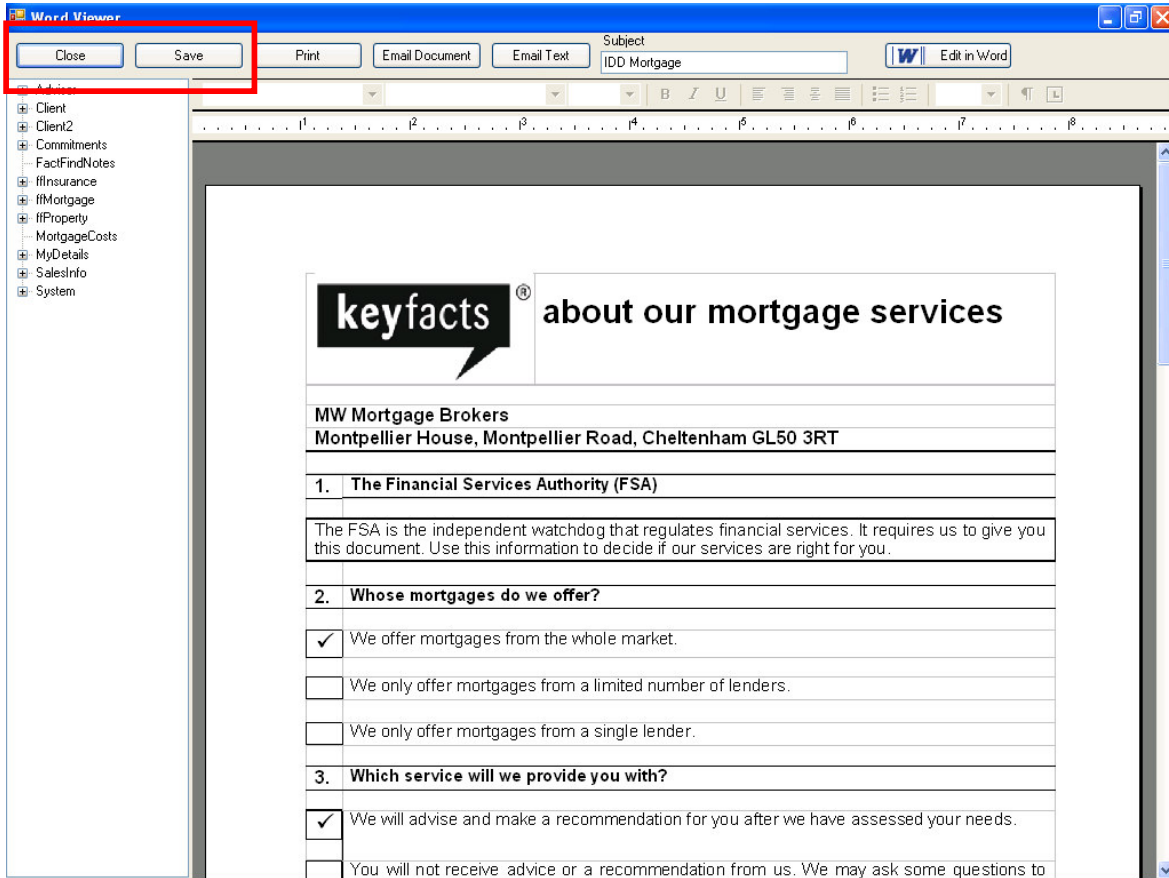
The screenshot shows the 'The Key v3.3.12 (KT0004)' application window. The left-hand navigation pane has 'Client' expanded, with 'Fact Find' highlighted. The main area displays 'Applicant 1' and 'Applicant 2' information. Below this is a table titled 'Please select the required sale record' with columns for Date Created, Description, Type, and Status. A single record is shown: 19/11/2009 16:36, First Time Buyer, Flat 2, Mortgage + General Insurance, Open. Below the table are several buttons: Delete Sale, Re-Open Sale, Close Sale, Copy Sale, New Sale, and Open Sale. A form section contains dropdown menus for Initial Contact Made, Produce IDD, Fact Find, Source & Select, Produce KFI, and RWL, each with a '<Today' button. A red box highlights the 'Create IDD for Sale' button. At the bottom, there is a 'Next >>' button and a 'Show notes for' section with checkboxes for Client, Sale, Product, Tasks, and System. A notes area shows two entries with dates and times, and an 'Add Note' section with a text box, a 'Private' checkbox, a 'to' dropdown set to 'Sale', and an 'Add Note' button.

This will display a list of templates that have been created in the Setup > Letters area which have been prefixed with the letters "IDD".

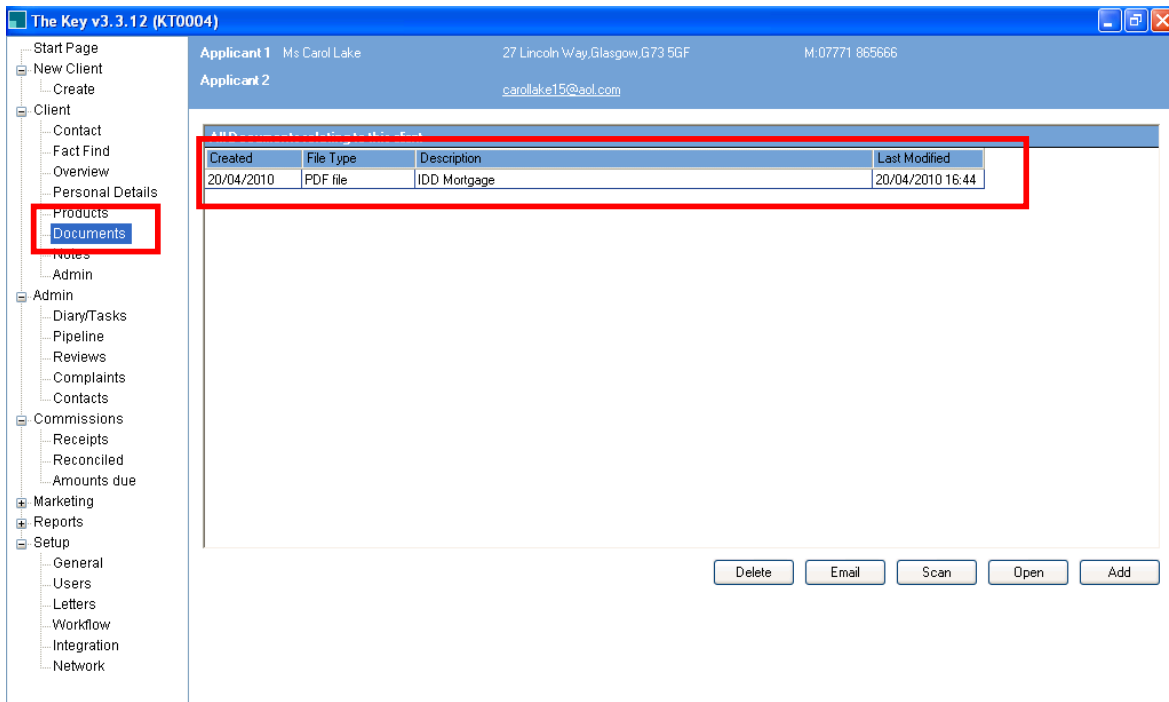
The screenshot shows a dialog box titled 'Please select IDD template'. It has a list box containing one item, 'IDD Mortgage', which is highlighted with a red box. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'. The 'OK' button is also highlighted with a red box.

Select the required IDD template and click **OK**.

This will open the IDD template which can be amended as appropriate to reflect the specific advice being provided to the client.



Once amended click on **Save** and **Close** which will save the document into the **Client > Documents** area of the relevant sale.



The Fact Find Summary Screen will be automatically updated to show the date the IDD was produced however this can be manually amended if the IDD document has previously been issued to the client e.g. during a previous client meeting. The **Create IDD for sale** button will also be updated to show a green tick.

The Key v3.3.12 (KT0004)

Applicant 1 Ms Carol Lake 27 Lincoln Way, Glasgow, G73 5GF M:07771 885666

Applicant 2 carollake15@aol.com

Please select the required sale record

Date Created	Description	Type	Status
19/11/2009 16:36	First Time Buyer, Flat 2	Mortgage + General Insurance	Open

Initial Contact made 19/11/2009 17:08 <Today>
 Produce IDD 20/04/2010 16:44 <Today> Create IDD for Sale
 Fact Find <Today>
 Source & Select <Today>
 Produce KFI <Today>
 RWL <Today>
 Completed Application

The same process as detailed above can be followed to create additional IDD templates and to add IDD's to additional sales.