sesame

How to Create Your Own Worklists

the key

The **Worklist** function can be found in the **Lead Management** and **Product** areas of the Key and allows an Adviser or Administrator to use the Key to assist in the administration of a Lead and Mortgage or Protection/GI application. This guide covers the following areas:

- The Benefits of Using Worklists
- Creating your own Worklist
- Lead Worklists
- Product Worklists
- How to associate an Administrator to an Adviser
- Adding a New Task to an Existing Worklist

The Benefits of Using Worklists

- The **Status** of the lead or product can be automatically updated as each item of the worklist is completed

- Tasks and diary items can be automatically created for each part of the administration process

- Tasks can easily be re-assigned to other advisers or administrators within the firm

- For Products, important dates relative to an application are automatically completed as each item of the worklist is completed, e.g. application, offer, exchange and completion

- For Products, the Pipeline register will hold an accurate picture of the progress of an application should an enquiry be received in relation to a case

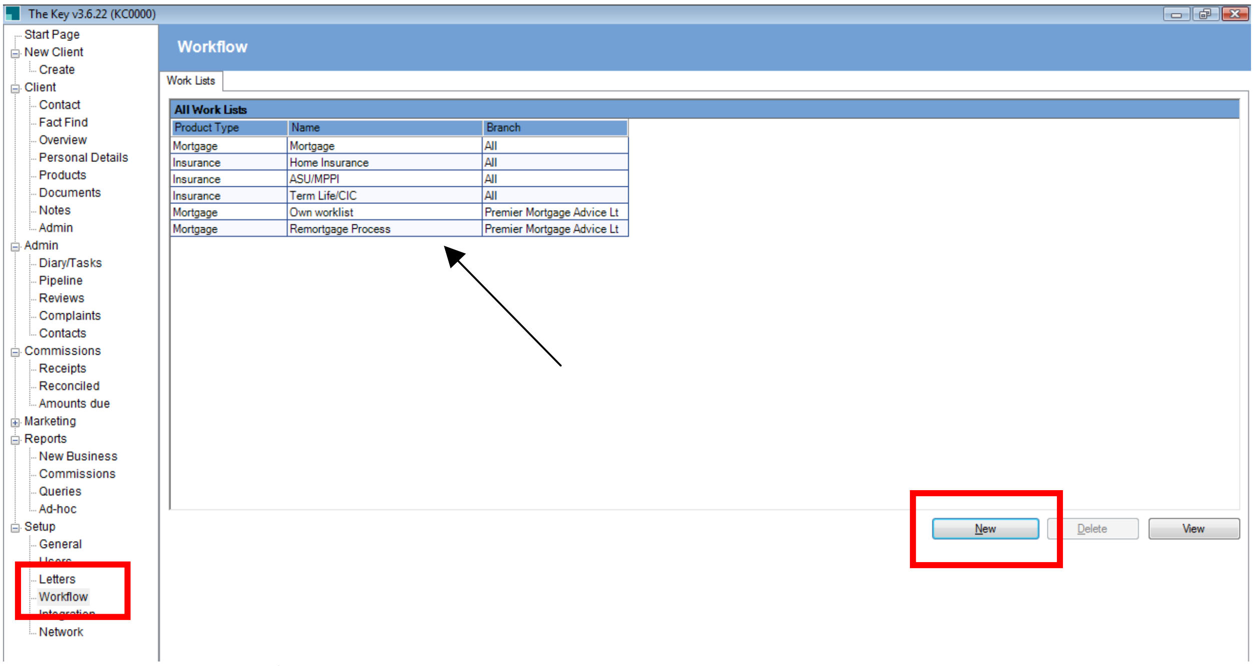
A standard Worklist has not been created for Leads as it is considered that individual firms will have their own specific procedures for administering Leads. However, the following standard Worklists are included in the Product area which are related to the Product Type selected. Additional guidance on the use of Worklists is included in the **Processing Mortgage Business** User Guide:

Product Type	Sub Type	Worklist Description
Mortgage	All	Mortgage
Insurance	Term Assurance, Combined Term / CIC, Critical Illness, Income Protection	Term Life/CIC
Insurance	PPI	ASU/MPPI
Insurance	Building/Contents	Home Insurance

For Leads and where a firm's procedures differ to the standard product worklists it is possible to create tailored Worklists. This User Guide explains this process.

Creating your own Worklist

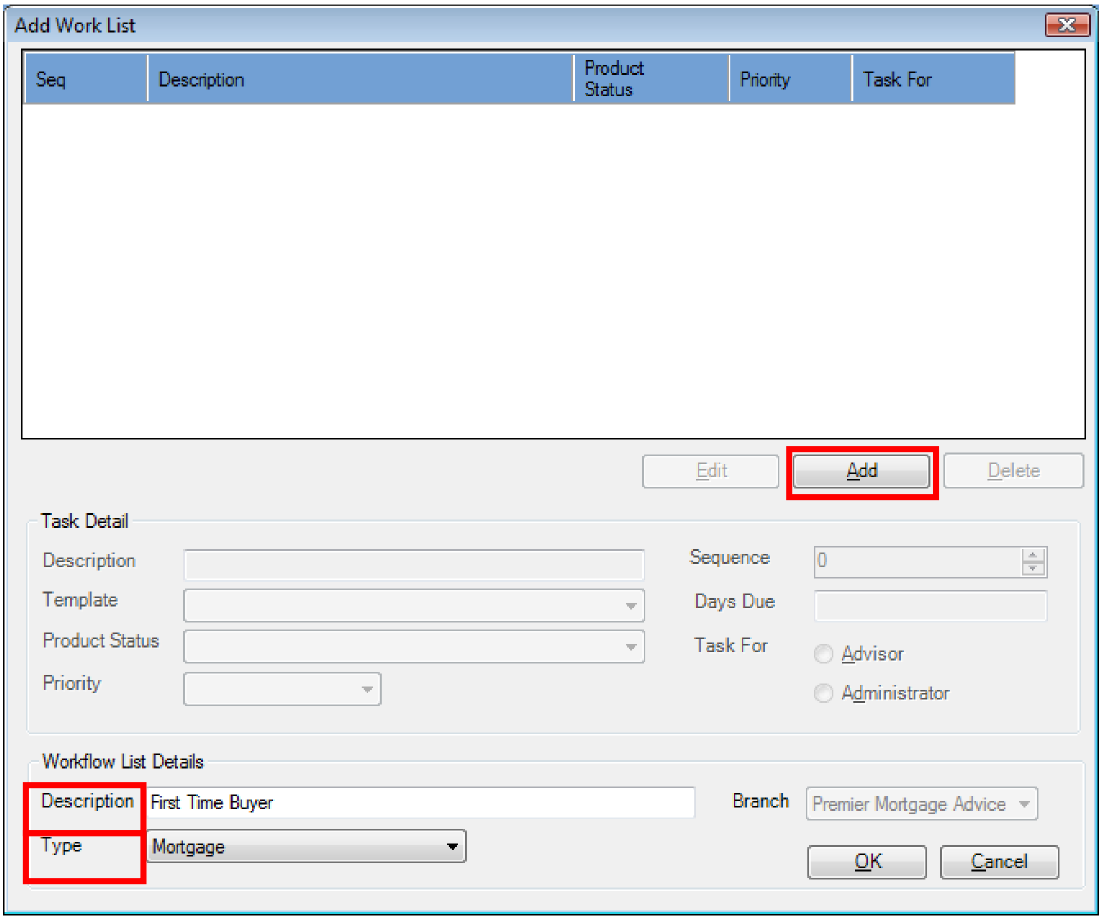
To create your own Worklist click on **Workflow** within the **Setup** area.



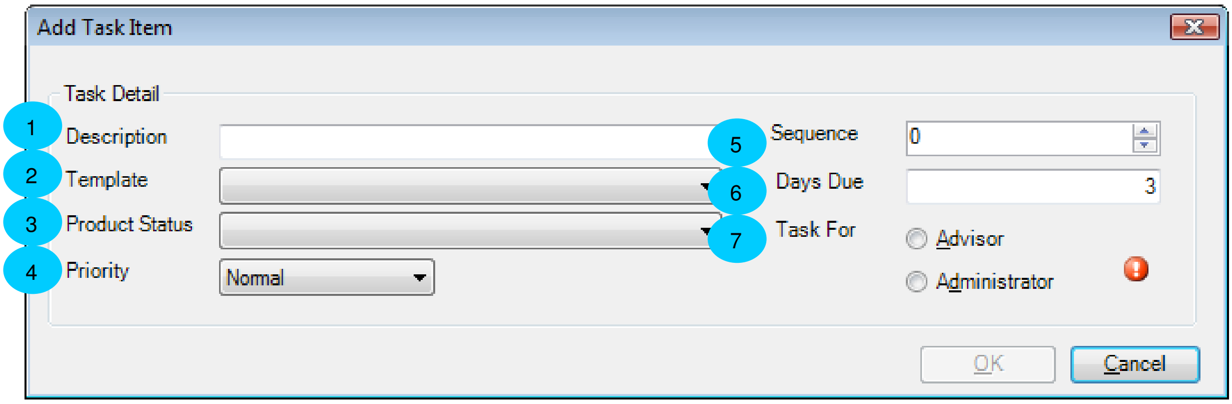
This will display a list of pre-set worklists and any worklists that have previously been created. **NB you are not able to edit or delete worklists unless they have been created by your firm however you are able to View them for reference.**

To create a new worklist click on the **New** button which will display an empty screen.

First enter a **Description** for your worklist and an area in the **Type** box (Mortgage, Insurance, Investment, Other or Lead) and then click on the **Add** button.



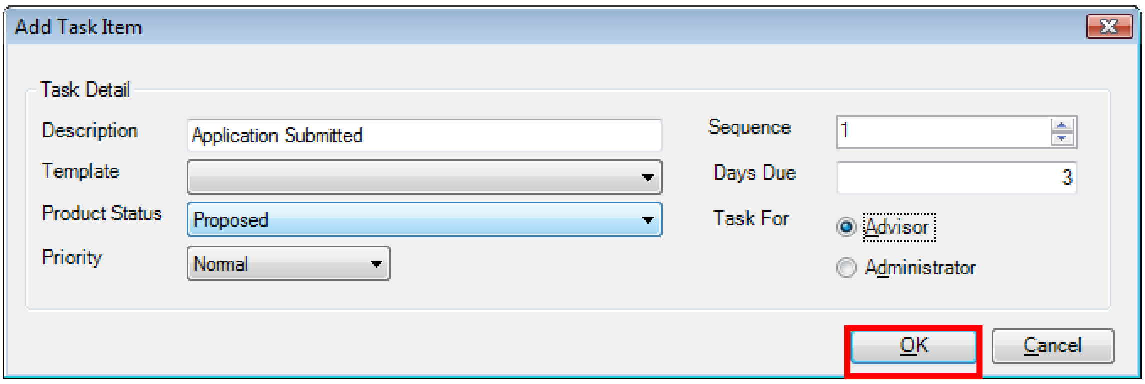
This will display the first task to be completed.



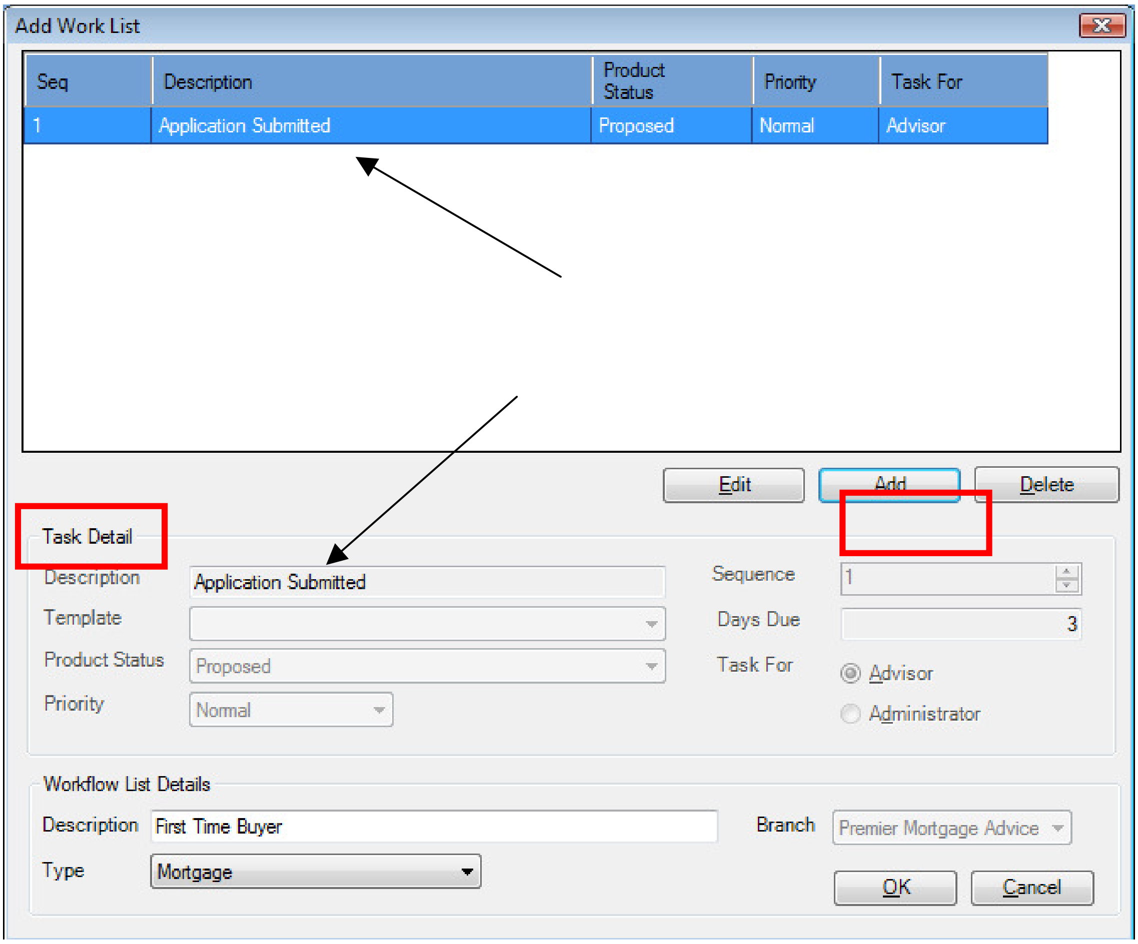
An explanation of each field is given below:

No.	Field name	Purpose
1	**Description**	Amend the description to your own wording
2	**Template**	Allows a document template to be attached to the task. This field can be left blank if no document is required
3	**Product Status**	This links the task to the lead or product status so that when the task is marked as **Completed** in the **Lead Management** or **Product** area the **Status** will be automatically updated. In addition, within the product area, where certain status fields are selected this will automatically populate the date fields within the applications area
4	**Priority**	Can be marked as High, Normal or Low. This will colour code the task within the **Admin > Diary/Tasks** area. If left blank the task will default to Normal
5	**Sequence**	This is the order in which the individual tasks will be displayed within the worklist
6	**Days Due**	This will diary the task for the number of days that are input. This field can be left blank if the task is due immediately
7	**Task For**	The task can be allocated for completion by the Advisor or associated Administrator. If left blank the task will default to the Advisor. **NB to allocate tasks to an administrator the administrator must be allocated to the Advisor within the Client > Admin area. Guidance on this is included at the end of this guide**

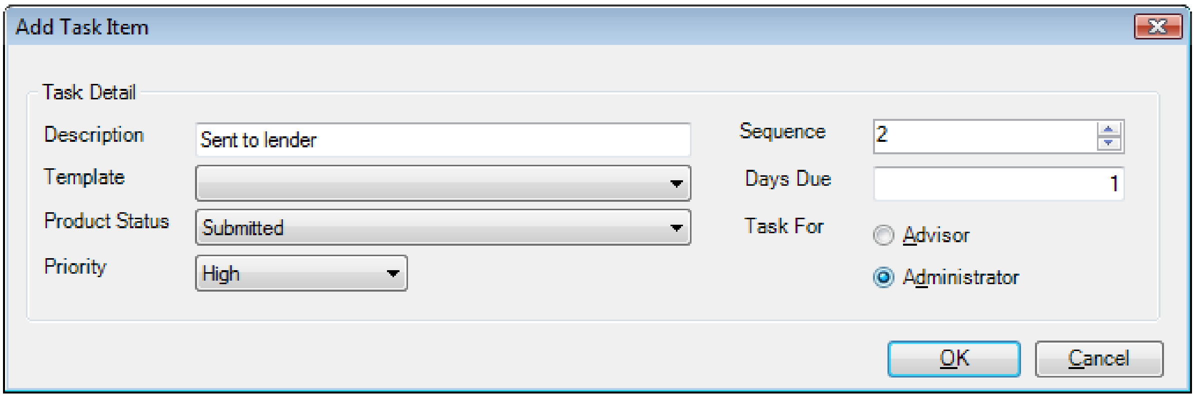
Enter the Task Detail and when finished click on **OK**.



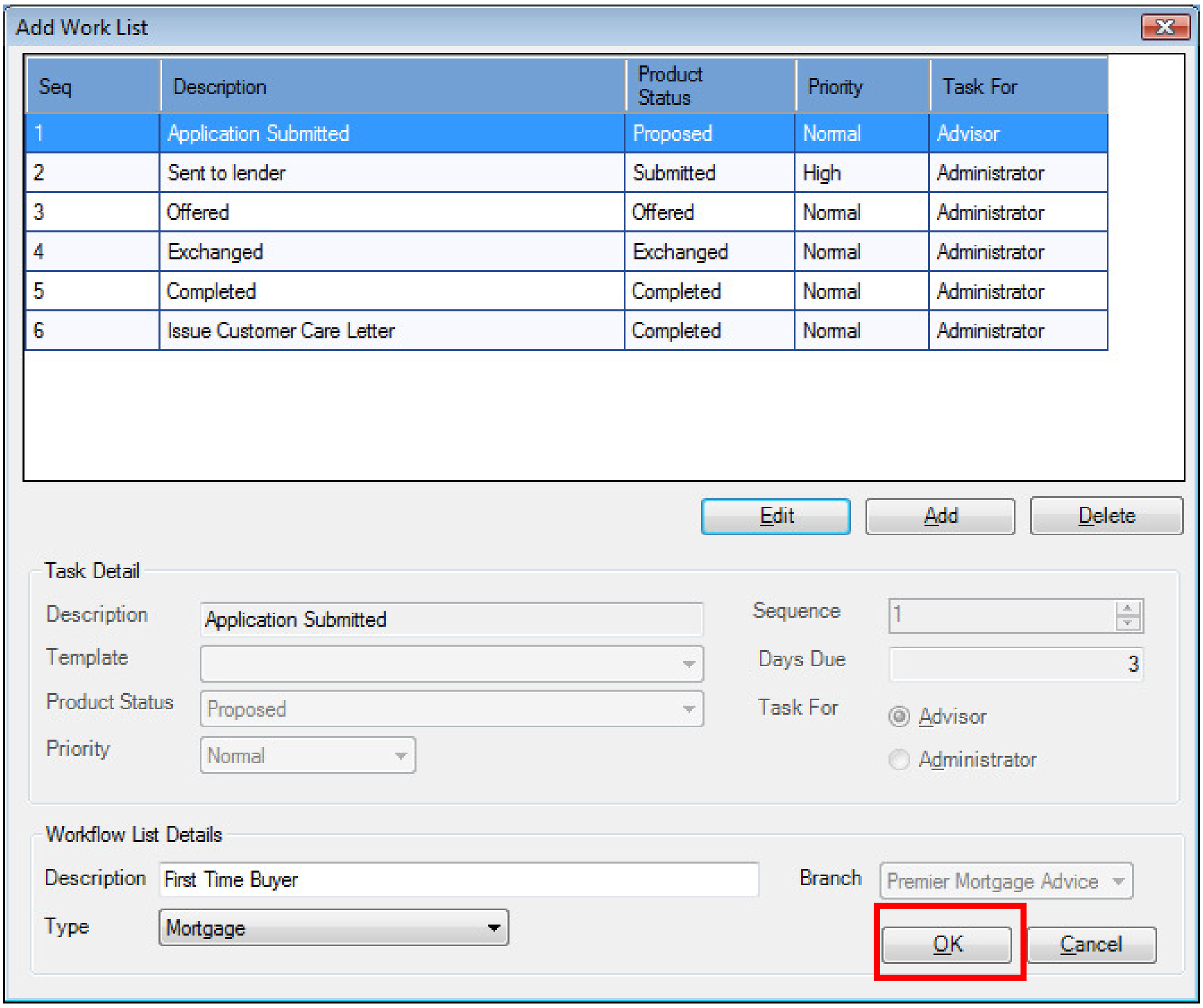
This will move the Task to the top of the Worklist screen. A summary of the task will be detailed in the **Task Detail** area



To enter a second and subsequent tasks click on the **Add** button and follow the same procedure as detailed above.



Repeat the above steps for each task to be included in the worklist and when finished click on the **OK** button.

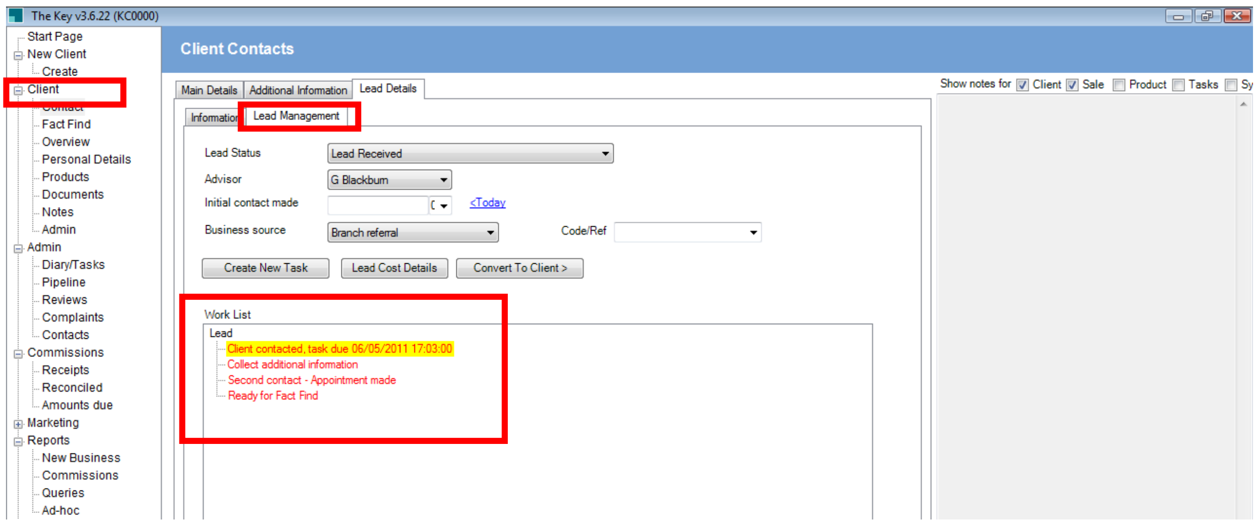


The completed Worklist will now be listed in the **Setup > Workflow** section and will be available as follows:

- **For Leads** – Client > Contact > Lead details > Lead Management
- **For Products** – Products > Worklist tab

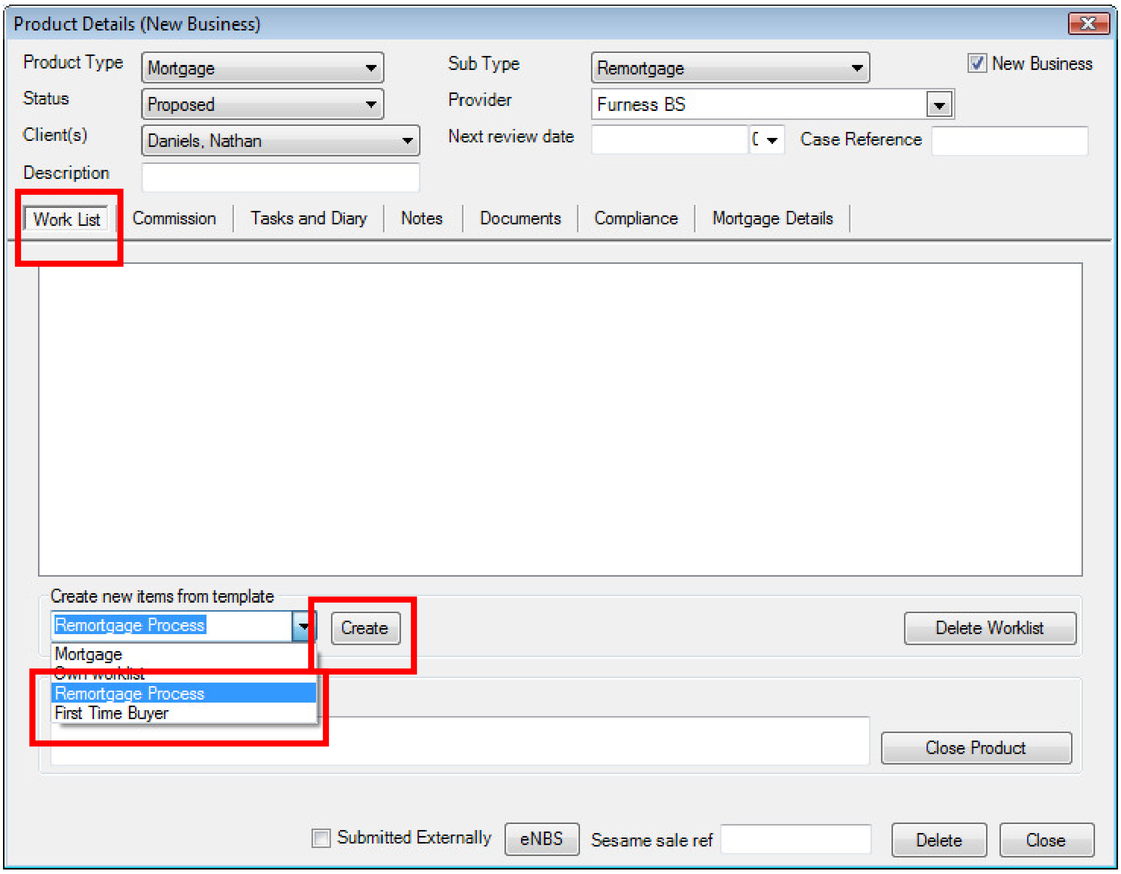
Lead Worklists

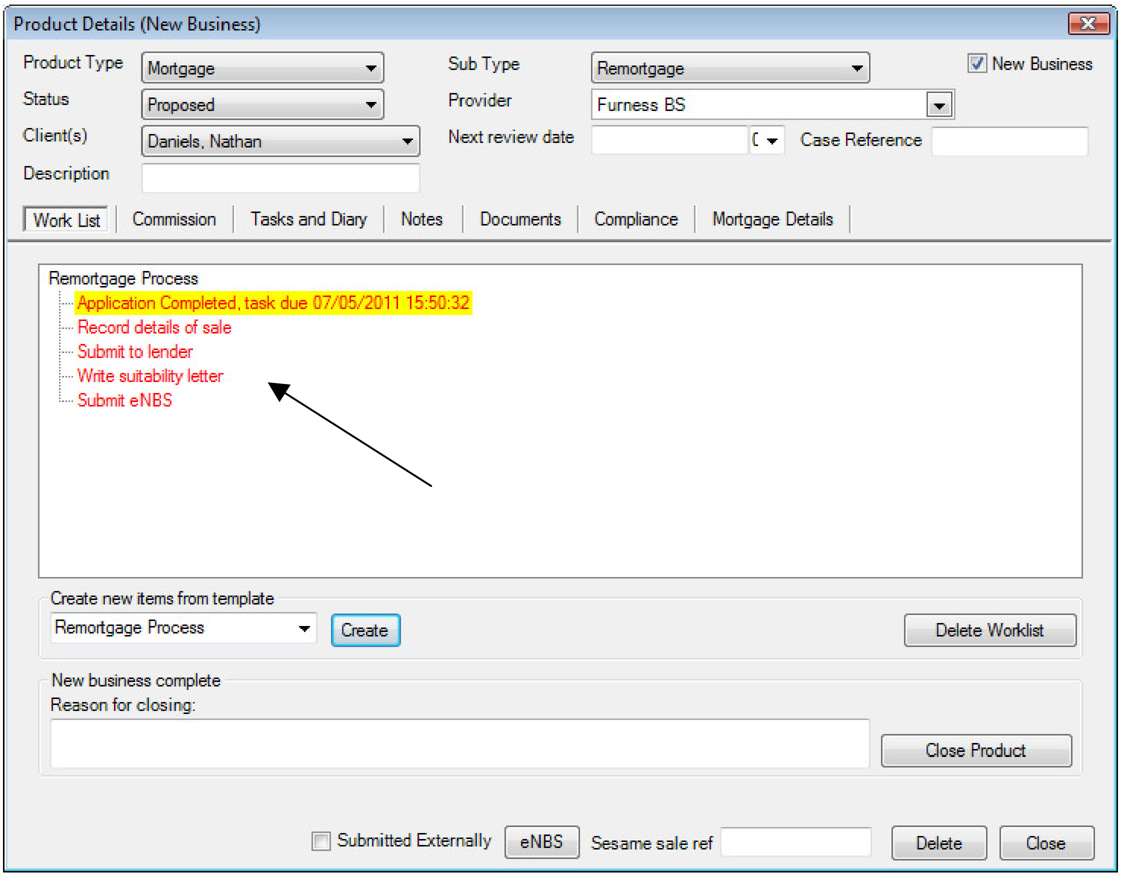
Where a Lead Worklist has been created within the **Setup > Workflow** area the worklist can be viewed within the **Lead Management** area and is created automatically when a Lead is created.



Product Worklists

Product Worklists are located within the **Client > Product > Worklist** area. Highlight the Worklist (in this example **"Remortgage Process",** click on **Create** and the Worklist will be displayed and will be ready for use.





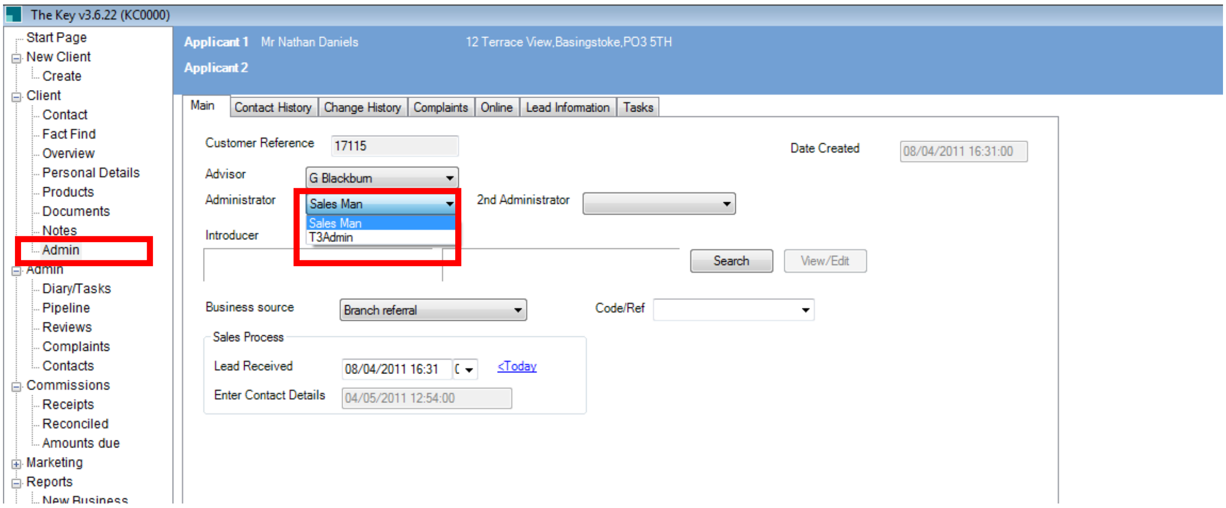
Further guidance on the use of Worklists in the Product area can be found in the User Guide "**Processing Mortgage Business**".

NB: this User Guide has concentrated on creating a Mortgage Worklist however the same procedure can be followed to create a bespoke Worklist for other areas including Leads and Insurance business.

How to associate an Administrator to an Adviser

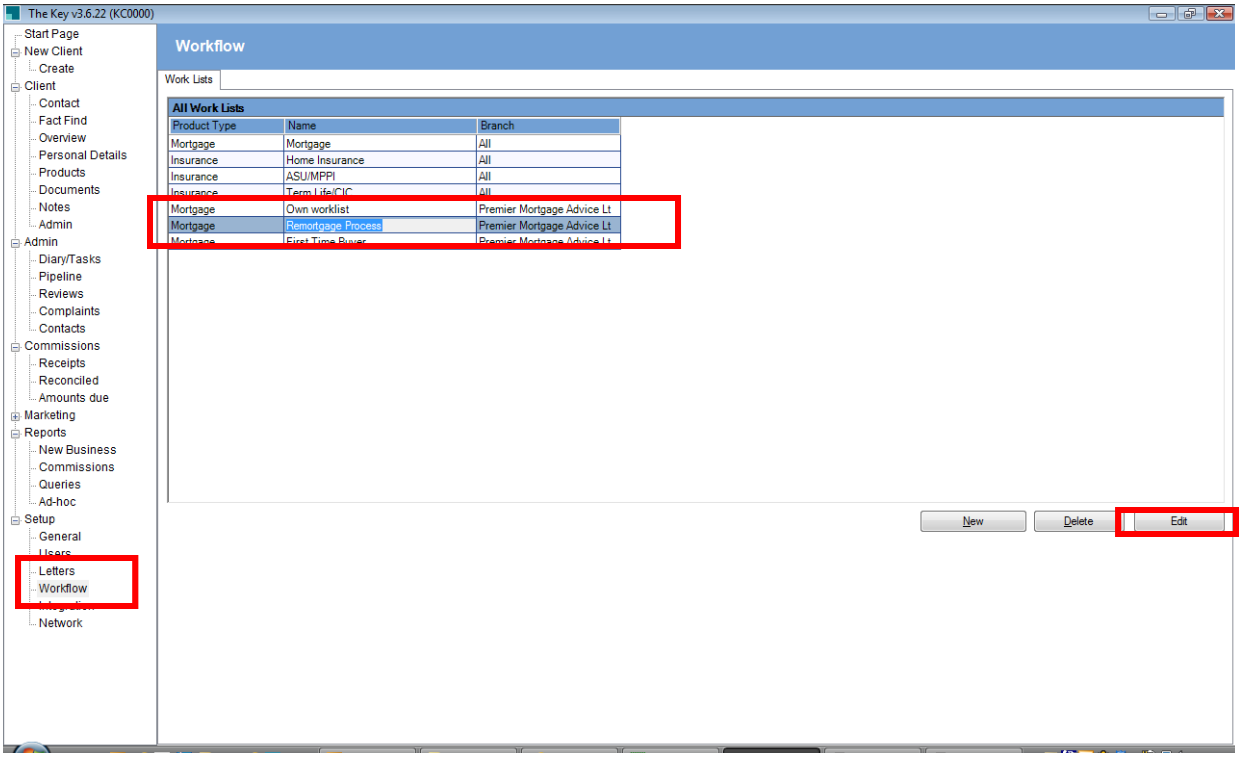
Where a task is assigned to an administrator within a Worklist it is important that the Adviser has an Administrator associated to them in order for the reassignment of tasks to be completed automatically. Where an Administrator is not associated the task will default to the Adviser.

To associate an Administrator to an Adviser enter the **Client** > **Admin** area and select an appropriate user in the **Administrator** box

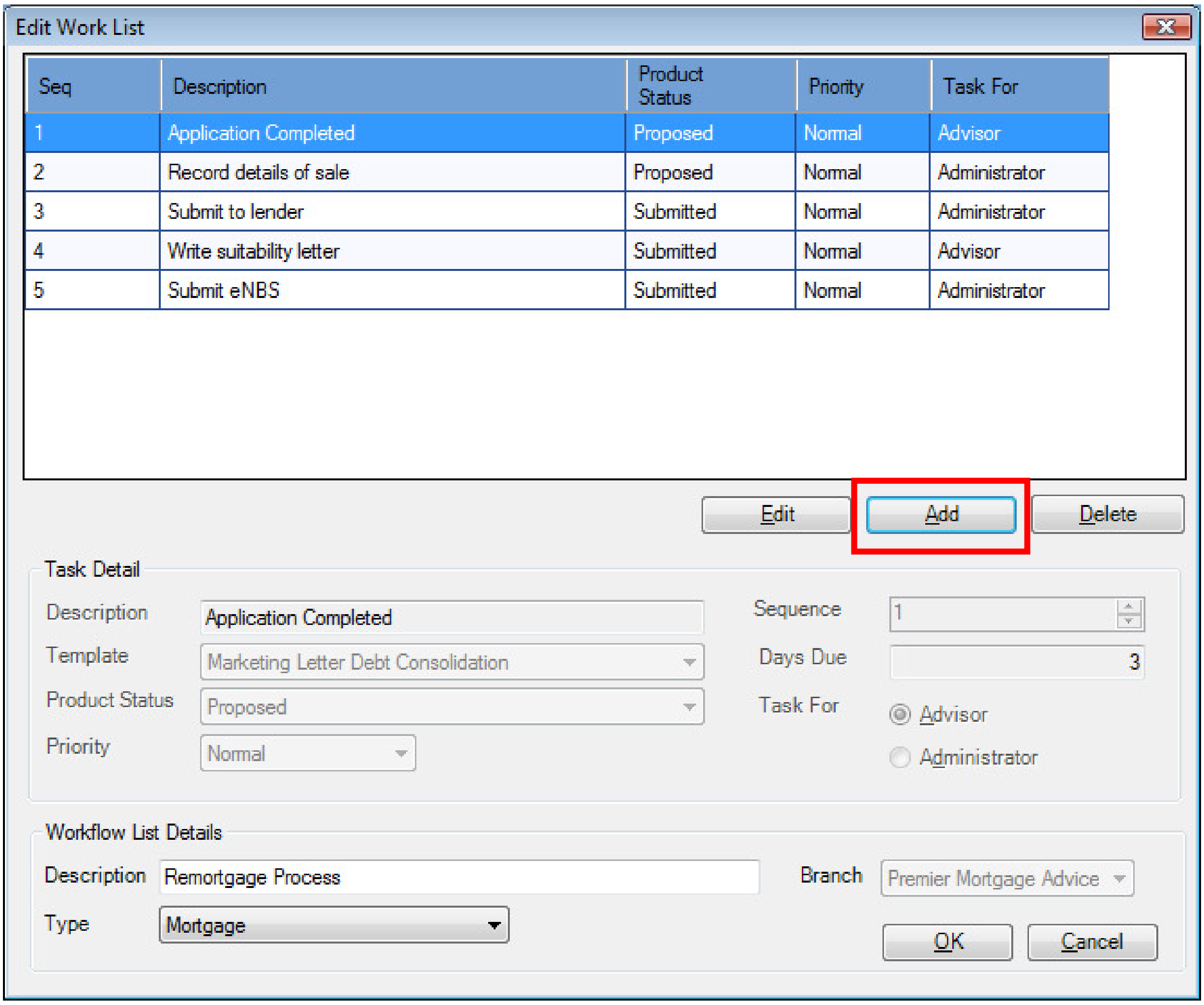


Adding a New Task to an Existing Worklist

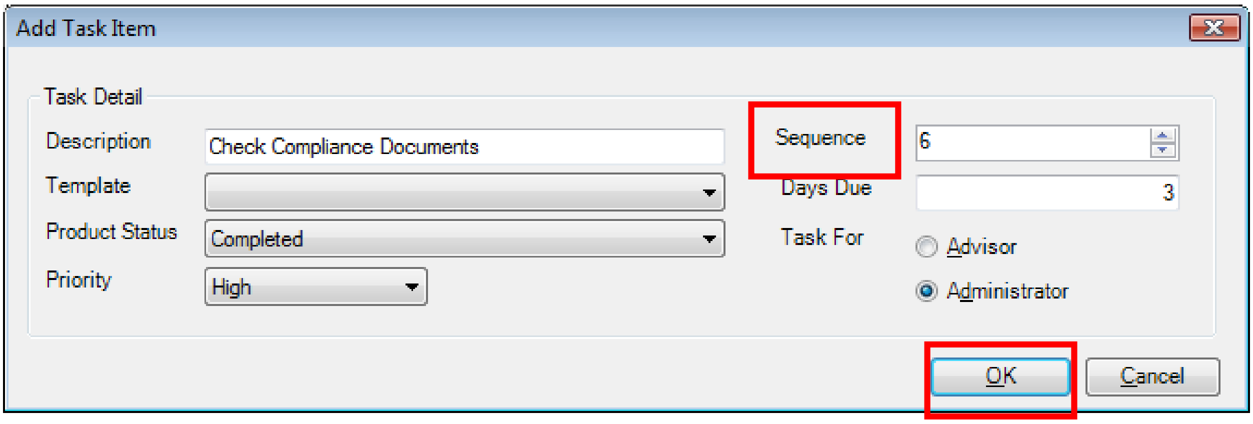
Highlight the Worklist in the **Setup** > **Workflow** area and click on **Edit**.



This will display the worklist that has been previously entered.

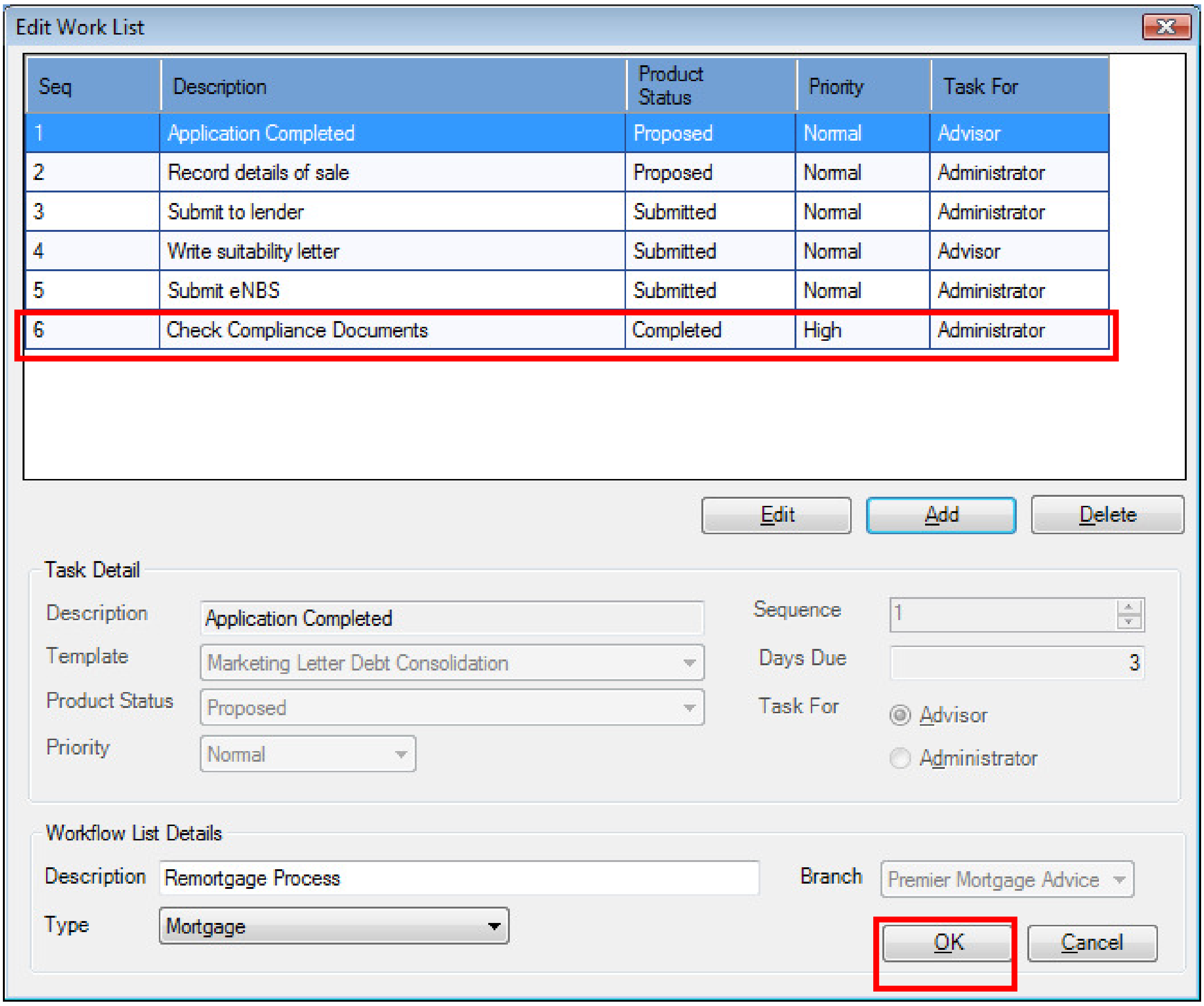


Click on **Add** and an **Add Task Item** box will be displayed where details of the new task can be entered.



The selection of the sequence number will determine when the task is to be completed. Any existing task sequence numbers will automatically be re-numbered.

Click **OK** to save the task which will return you to the full task list where the new task will be displayed as shown below.



Click **OK** to save the worklist.