

How to Create Your Own Worklists

The **Worklist** function can be found in the **Product** area of the Key and allows an Adviser or Administrator to use the Key to assist in the administration of a mortgage or protection/GI application.

The Benefits of Using Worklists

- The **Status** of the product is automatically updated as each item of the worklist is complete
- 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
- Important dates relative to the application are automatically completed as each item of the worklist is completed, e.g. application, offer, exchange and completion
- The Pipeline register will hold an accurate picture of the progress of an application should an enquiry be received in relation to a case

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	Level / Decreasing Term Assurance, Income Protection, Critical Illness, Family Income Benefit	Term Life/CIC
Insurance	PPI	ASU/MPPI
Insurance	Building/Contents	Home Insurance

However, it is possible to create your own Worklists within the Key where your own application process does not match the tasks included within the standard workflow. This User Guide explains this process.

Creating your own Worklist

To create your own Worklist to be used in the Product area 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 a **Product** in the **Type** box 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

No.	Field name	Purpose
3	Product Status	This links the task to the product status so that when the task is marked as Completed in the Product area the Status will be automatically updated. In addition 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**.

Add Task Item

Task Detail

Description: Application Submitted

Template: [Dropdown]

Product Status: Proposed

Priority: Normal

Sequence: 1

Days Due: 3

Task For: Advisor Administrator

OK Cancel

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

Add Work List

Seq	Description	Product Status	Priority	Task For
1	Application Submitted	Proposed	Normal	Advisor

Edit Add Delete

Task Detail

Description: Application Submitted

Template: [Dropdown]

Product Status: Proposed

Priority: Normal

Sequence: 1

Days Due: 3

Task For: Advisor Administrator

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

Add Task Item

Task Detail

Description: Sequence:

Template: Days Due:

Product Status: Task For: Advisor

Priority: Administrator

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

Add Work List

Seq	Description	Product Status	Priority	Task For
1	Application Submitted	Proposed	Normal	Advisor
2	Sent to lender	Submitted	High	Administrator
3	Offered	Offered	Normal	Administrator
4	Exchanged	Exchanged	Normal	Administrator
5	Completed	Completed	Normal	Administrator
6	Issue Customer Care Letter	Completed	Normal	Administrator

Task Detail

Description: Sequence:

Template: Days Due:

Product Status: Task For: Advisor

Priority: Administrator

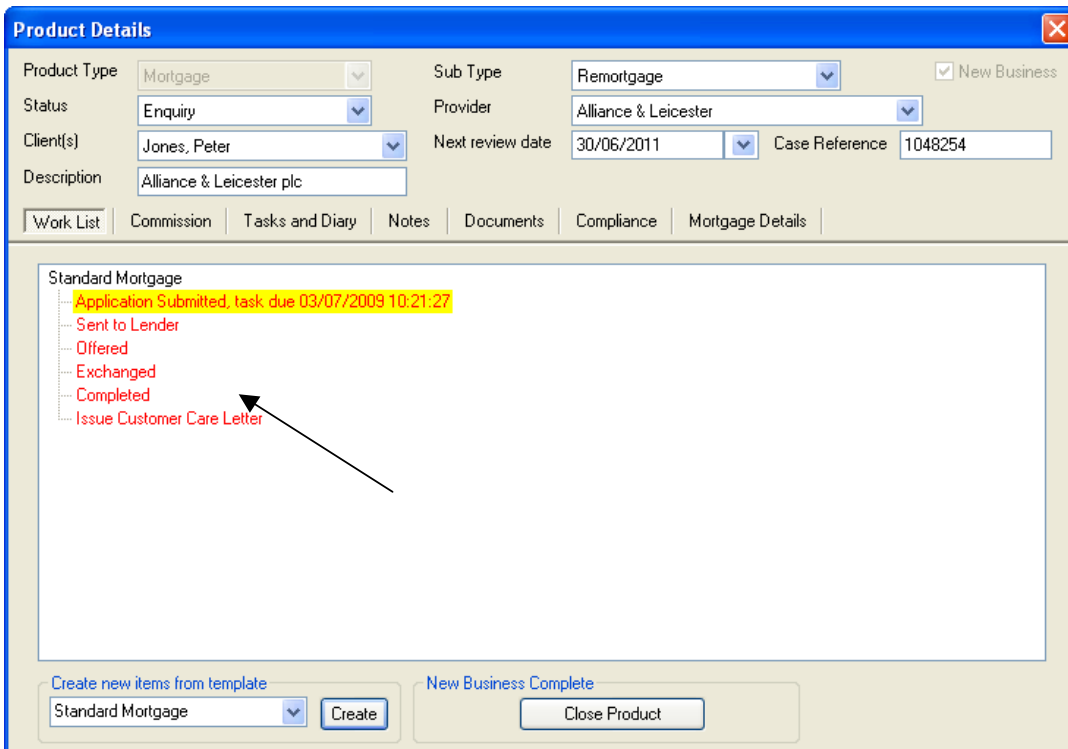
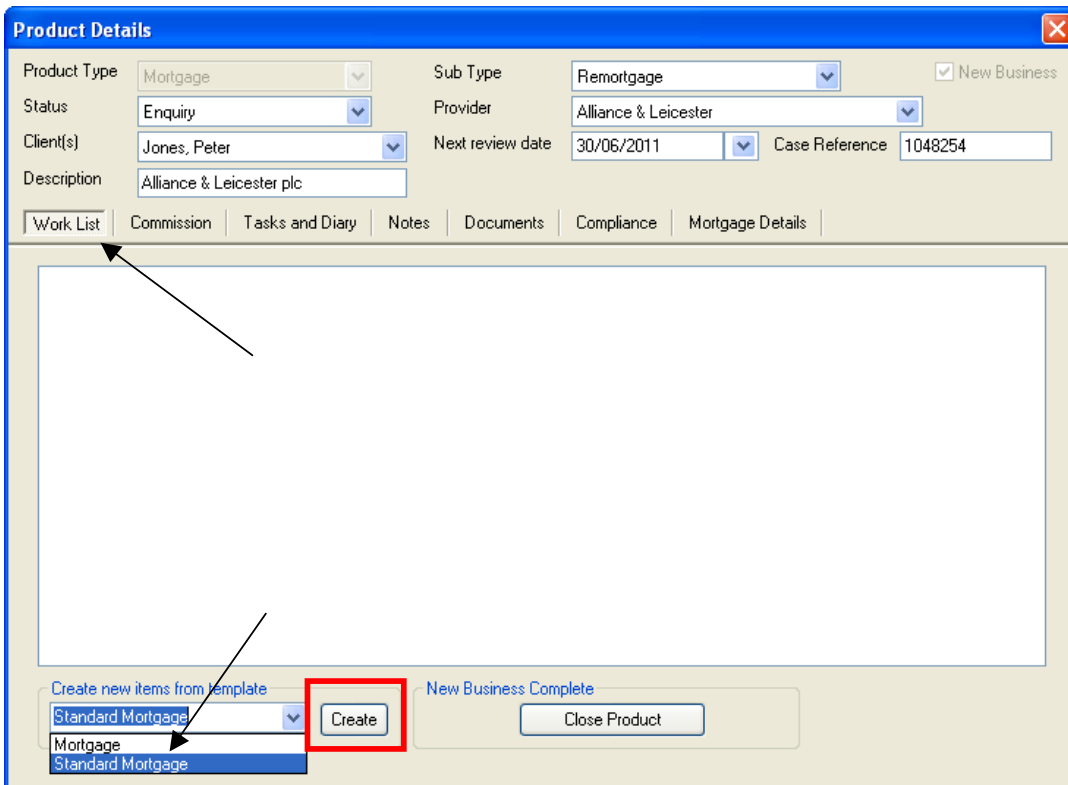
Workflow List Details

Description: Branch:

Type:

The completed Worklist will now be listed in the **Setup > Workflow** section and will be available when selecting a Worklist in the **Client > Product** area as shown below.

Within the **Client > Product** area highlight the Worklist (in this example “**Standard Mortgage**”, 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 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

The Key v3.2.12 (KT0004)

Applicant 1 Mr Peter Jones The Viewcc,High Street,SN1 2BW H:01295 528425, M:07742 586885, W:01295 528885

Applicant 2 pi@yahoo.co.uk

Main Contact History Change History Complaints Online Lead Cost Tasks

Customer Reference 16703 Date Created 25/06/2009 15:56:00

Advisor G West

Administrator Shirley Bean

Introducer G West

ABC Introductions Brian Wellby abc.co.uk Search View/Edit

Business source Existing client Code/Ref

Sales Process

Lead Received <Today

Enter Contact Details 25/06/2009 16:34:00

Initial Contact Made 27/05/2009 10:33 <Today

Adding a New Task to an Existing Worklist

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

The Key v3.2.12 (KT0004)

Workflow

Work Lists

Product Type	Name	Branch
Mortgage	Mortgage	All
Insurance	Home Insurance	All
Insurance	ASU/MPPPI	All
Insurance	Term Life/CIC	All
Mortgage	Standard Mortgage	MW Mortgage Brokers

New Delete Edit

This will display the worklist that has been previously entered.

Add Work List

Seq	Description	Product Status	Priority	Task For
1	Application Submitted	Proposed	Normal	Advisor
2	Sent to lender	Submitted	High	Administrator
3	Offered	Offered	Normal	Administrator
4	Exchanged	Exchanged	Normal	Administrator
5	Completed	Completed	Normal	Administrator
6	Issue Customer Care Letter	Completed	Normal	Administrator

Task Detail

Description:
 Sequence:

Template:
 Days Due:

Product Status:
 Task For: Advisor Administrator

Priority:

Workflow List Details

Description:
 Branch:

Type:

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

Add Task Item

Task Detail

Description:
 Sequence:

Template:
 Days Due:

Product Status:
 Task For: Advisor Administrator

Priority:

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.

Edit Work List ✖

Seq	Description	Product Status	Priority	Task For
1	Application Submitted	Proposed	Normal	Advisor
2	Sent to lender	Submitted	High	Administrator
3	Offered	Offered	Normal	Administrator
4	Exchanged	Exchanged	Normal	Administrator
5	Completed	Completed	Normal	Administrator
6	Check Compliance Documents	Completed	High	Administrator
7	Issue Customer Care Letter	Completed	Normal	Administrator

Task Detail

Description:
 Sequence:

Template:
 Days Due:

Product Status:
 Task For: Advisor Administrator

Priority:

Workflow List Details

Description:
 Branch:

Type:

Click **OK** to save the worklist.