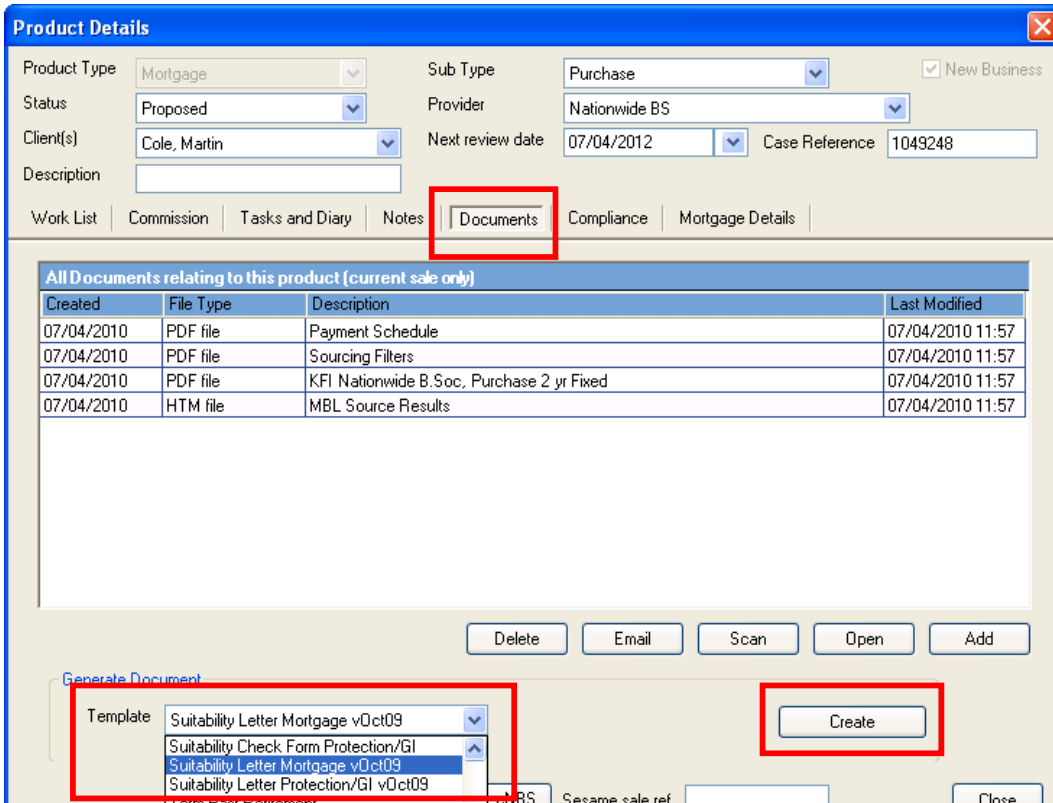


How to produce a Suitability Letter

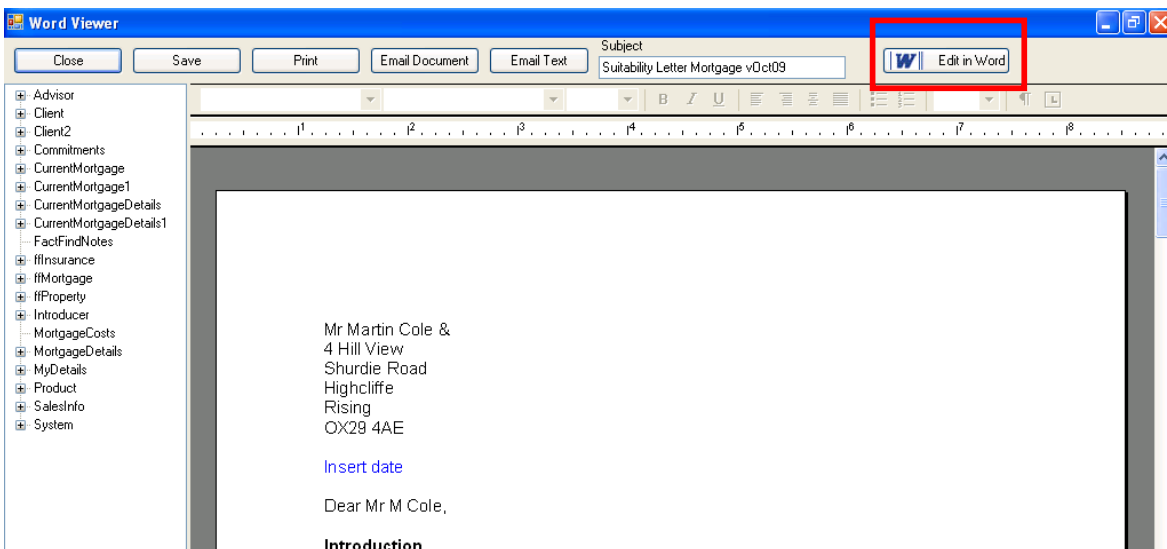


Suitability Letters can be produced as soon as a product has been created. Enter the **Product** area of the selected client and click on the **Documents** tab.



You will see at the bottom of the screen an area called **Generate Document**. By clicking on the drop down arrow next to **Template** this will display a list of documents held within the system. From here you can select a **Suitability Letter** template for either Mortgage or Protection/GI.

Click on **Create** and this will create a template letter based on the Sesame Suitability Letter templates held on the Sesame website.

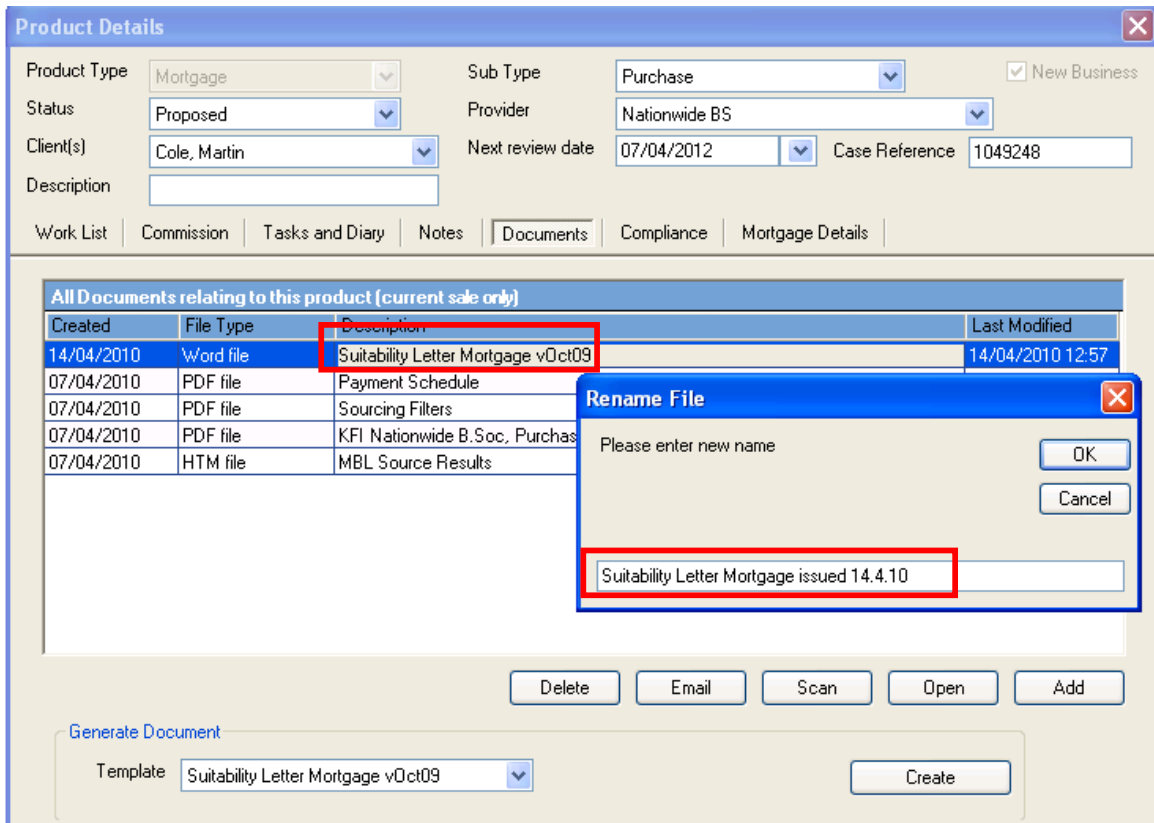


This letter will be populated with certain information populated from the **Fact Find** and **Products** area and can be amended to your own requirements and the client's specific circumstances by adding additional wordings as appropriate.

By clicking on the **Edit in Word** button this will open the document in Word and allow detailed formatting to be undertaken including copying of text from other documents that may already have been created.

When finished the letter can be saved and closed which will return a copy to the **Documents** area of the Product.

The name of the document can be amended by highlighting the document, "right clicking" in the **Description** column and selecting **Rename**



Creating your own Suitability Letter Template

It is possible to create your own Suitability Letter template and add this into the Key using the following procedures:

- Draft a Suitability Letter and save this onto your own computer e.g. Desktop or My Documents
- Copy and paste relevant merge fields from the Key into your own letter using the Suitability Letter template held on http://www.thekey.uk.com/sesame_thekey.aspx
- Add the combined document (including merge fields) into the Key via the **Setup > Letters** area, **Add Existing File**

Further guidance on creating your own templates can be found in the **Document Management** User Guide.