

Key News December 09

New and Updated User Guides

A number of changes have been made to the User Guides on the Key website http://www.thekey.uk.com/sesame_thekey.aspx. These can also be found on the Sesame Website in the Technology area:

- **Products and Quotes Exchange** – This is a new guide which explains in detail how to produce comparison quotes and illustrations and apply for business through the Exchange via the Key. This functionality was released in version 3.2.
- **How to Submit an eNBS with the Key** – This has been updated to include guidance on attaching your Suitability Letter to the New Business area of the Sesame website following submission of the eNBS through the Key.
- **Closing a Product** – this is a new guide which details the process for closing products at the end of a sales process or where a product has been created for research purposes only. The process of closing a product is important to ensure that the Product area retains an accurate picture of a client's current circumstances and will streamline the process where future business is written with a client.
- **Completing the ProtectionGI Fact Find** – this has been updated to reflect changes made to the Insurance Fact Find in the latest release 3.2, in particular the ability to quote through the Exchange.
- **Contact Sheet** – this has been updated to include Exchange contact details.

Fact Find Updates

A number of cosmetic changes have been made to the Mortgage and Insurance Fact Find documents held within the Key. The changes are as follows

- **Issue Date of IDD on front page of Fact Find** – This date is captured on the Client > Contact > Additional Information screen and can be completed when first creating the client
- **Issue Date of Data Protection Statement** – this date is not captured in the Key but can be free-typed
- **Nationality field included in Applicant Details** – this field is now included in the Client > Fact Find > Client Cont. Screen. A single option of British is included within the drop-down list however alternative nationalities can be freetyped.
- **Current Mortgage Address** – this is now included with other details of the client's Current Mortgage. This is recorded in the Client > Fact Find > Current Mortgage screen
- **Additional Mortgages** – where a client has more than one Current Mortgage these can be now be printed using the Fact Find Additional Mortgages document. The first mortgage will be printed on the main fact find and an additional 5 mortgages can be printed on the new document. The Fact Find Additional Mortgages document can be found in the Client > Documents area within the Generate Document > Template list

Useful Contacts

- **User Guides** – Visit www.sesame.co.uk and select The Key under the 'Technology Solution' pages, or visit http://www.thekey.uk.com/sesame_thekey.aspx
- **Requesting Exchange/Exweb licences** – If you haven't already got an Exchange/Exweb account, email your firm and individual details to POS@sesame.co.uk
- **Requesting training on The Key** – If you want to request online training support, email POS@sesame.co.uk or call the Sesame Contact Centre on **0845 122 1515**
- **Requesting access to The Key** – If you don't already have access to The Key, email POS@sesame.co.uk or call the Sesame Contact Centre on **0845 122 1515**
- **Technical queries on The Key** – for technical queries regarding how to use The Key, call The Key helpline on **0871 384 0194**