sesame

the key

Release Notes 2.9.28

The purpose of this Release Note is to confirm changes that have been made to the system in version 2.9.286.

Amendments have been made to the following areas:
- Client Import
- Setup Letters

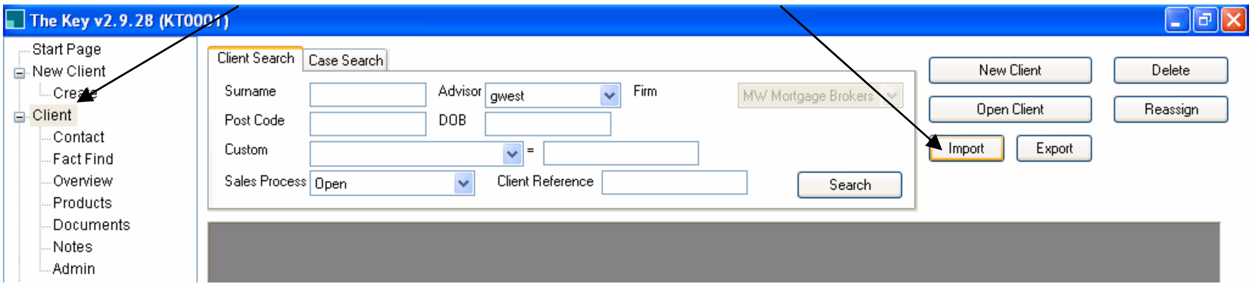
Client Import

The **Import** function can be found within the **Client** module. It enables client data previously input into Trigold and Mortgage Brain "MBL" to be input as client details into the Key. A fix has been made to allow the import to be completed.

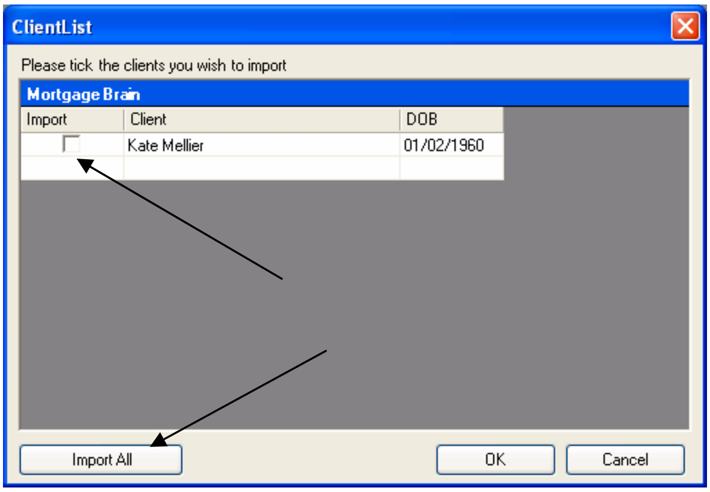
It should be noted that the import function will only transfer basic client data and documentation from the source system into the Key and should not be viewed as a full data transfer. The actual level of data imported will depend on the amount of data previously held within Trigold or MBL.

In order to import client data from Trigold or MBL go to the **Client** area and click on the **Import** button.

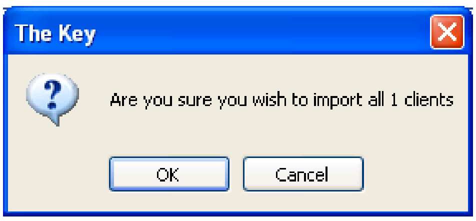
This will list the possible import sources including Trigold and MBL.



Click on the relevant source (in this case we will select MBL) and a list of clients held in the source system will be displayed.

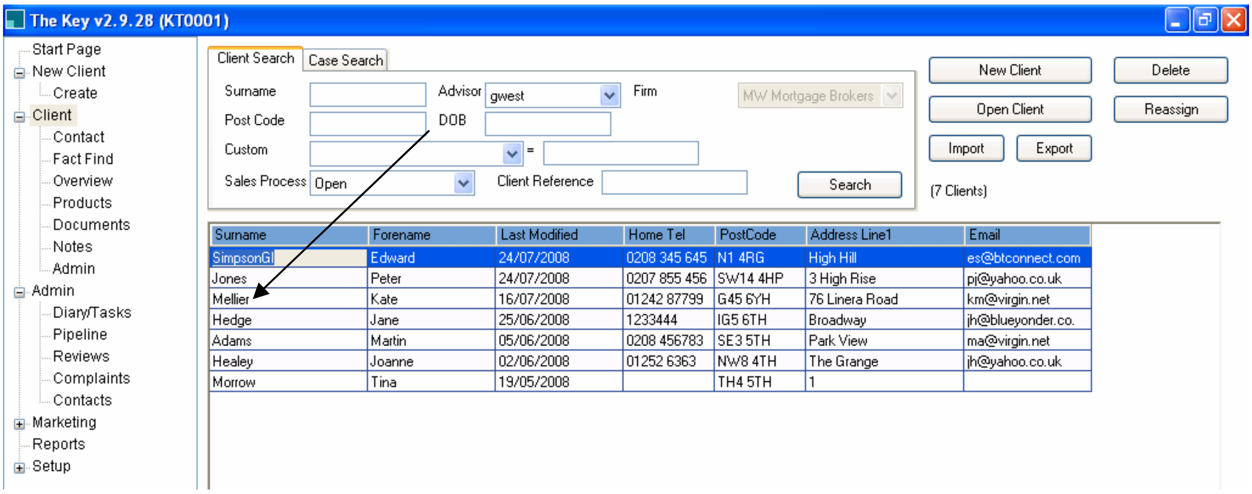


Select the required client(s) by ticking the relevant boxes and **OK** or click on **Import All** to import all clients. If you select to import all clients a warning will be displayed as follows.



Click **OK** to proceed.

The clients that have been imported will now appear in the list of clients held within the Key.



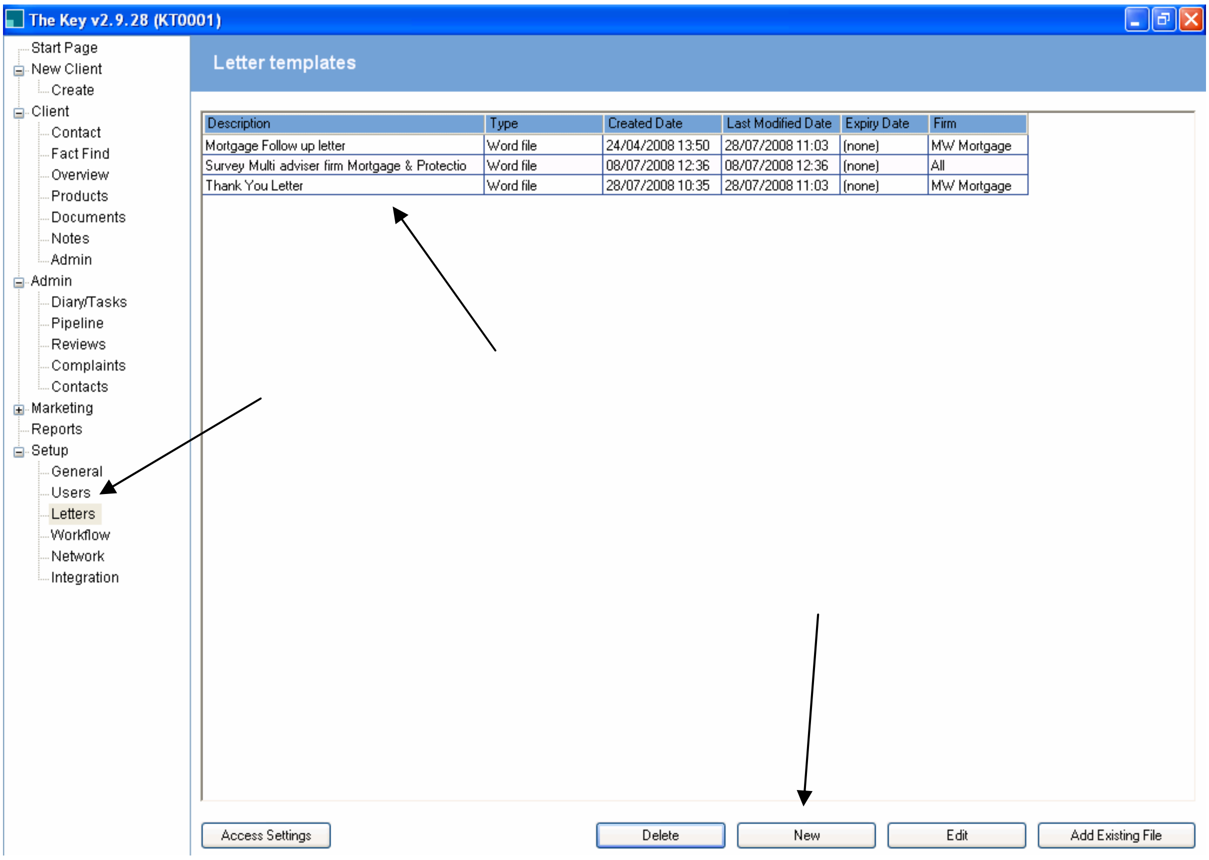
The same procedure will apply for the import of Trigold clients.

Setup Letters

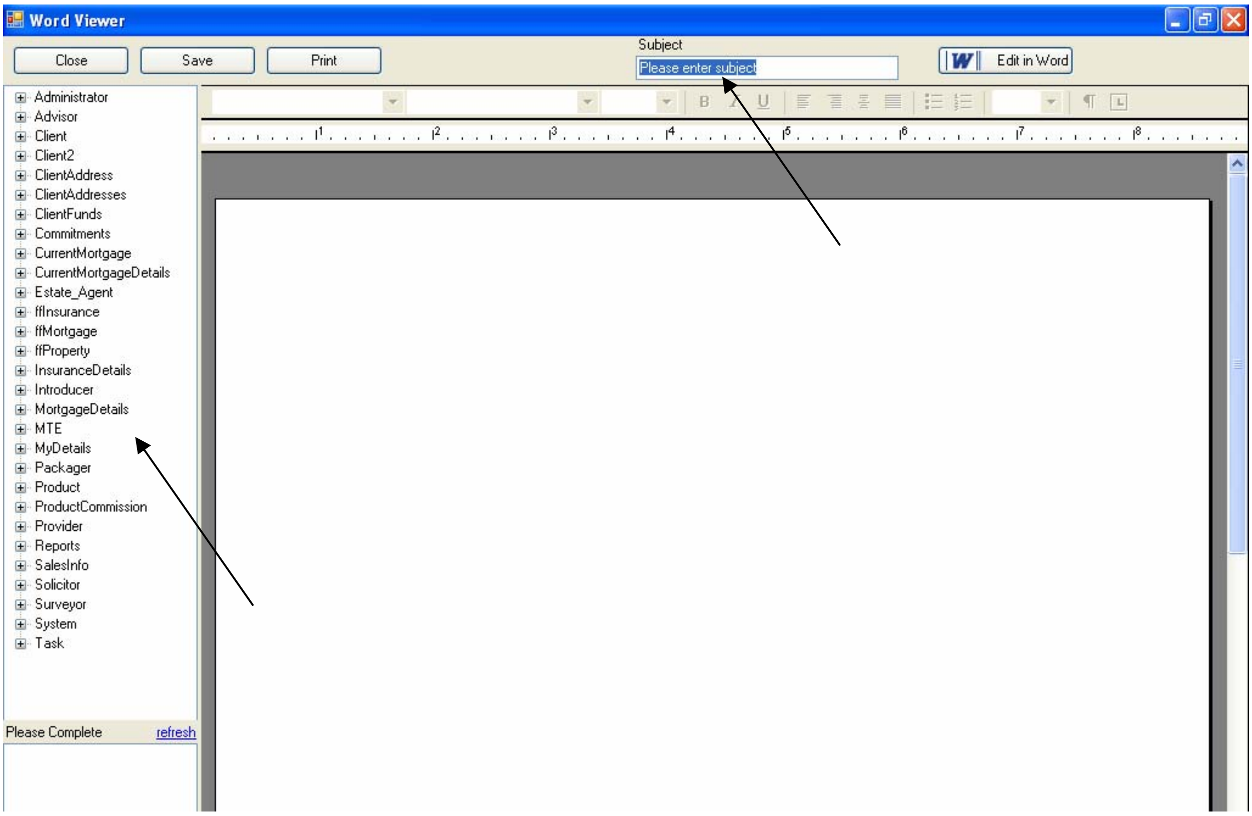
This part of the system is now available to all users who have the relevant permission (View / Edit/ Add letter templates) in their User profile set up by their System Administrator.

This area will allow template letters to be created within the Key allowing client data input via the Fact Find screens to be included avoiding the need for re-typing and allowing documents to be retained within the system.

Click on the **User Letters** area on the left hand side of the screen which will display any previously recorded templates.

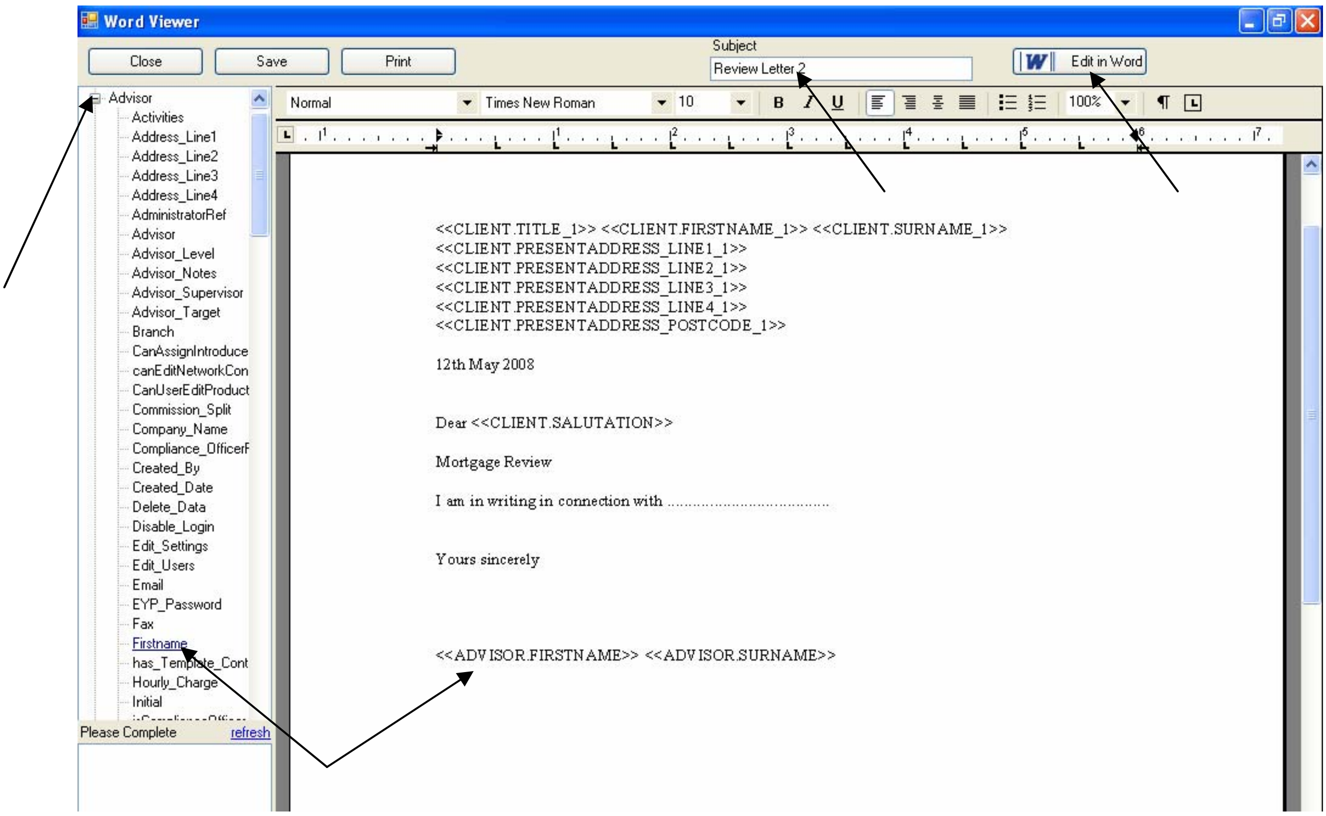


Click on **New** at the bottom of the Letter templates page. This will display a screen in Word Viewer mode with a list of merge fields from the Fact Find on the left hand side.



Click on the **Subject** field and rename to the title of document required. Next click in the document where you wish to start your text.

You can then proceed to add any text or required merge fields. To insert a merge field ensure the cursor is in the correct position and then click on the “plus” sign next to each subject heading e.g. “**Advisor**”, then select the required field e.g. Firstname.

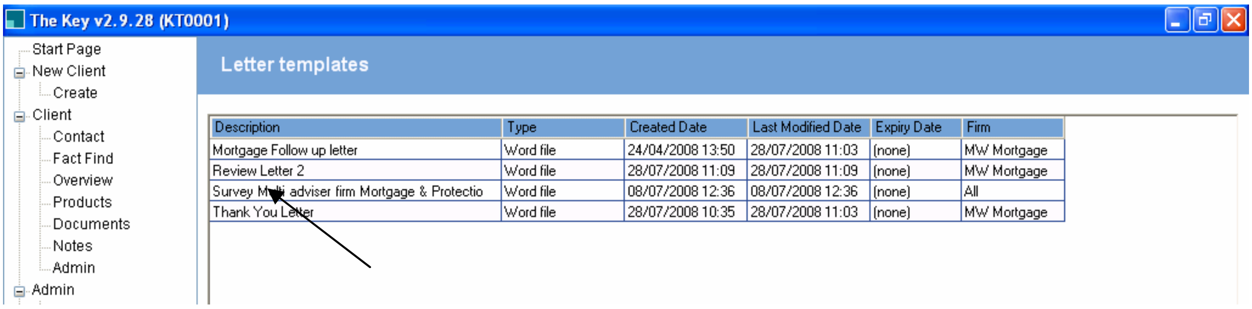


Noted below are a number of the common merge fields you may require:

Client Information	Heading	Field Name
Client Title	Client	Title_1
Client First Name	Client	Firstname_1
Client Surname	Client	Surname_1
Salutation e.g. Mr P Jones	Client	Salutation
Address	Client	Presentaddress_Line1_1 Presentaddress_Line2_1 Presentaddress_Line3_1 Presentaddress_Line4_1 Presentaddress_Postcode_1
Adviser name	Advisor	Firstname Surname

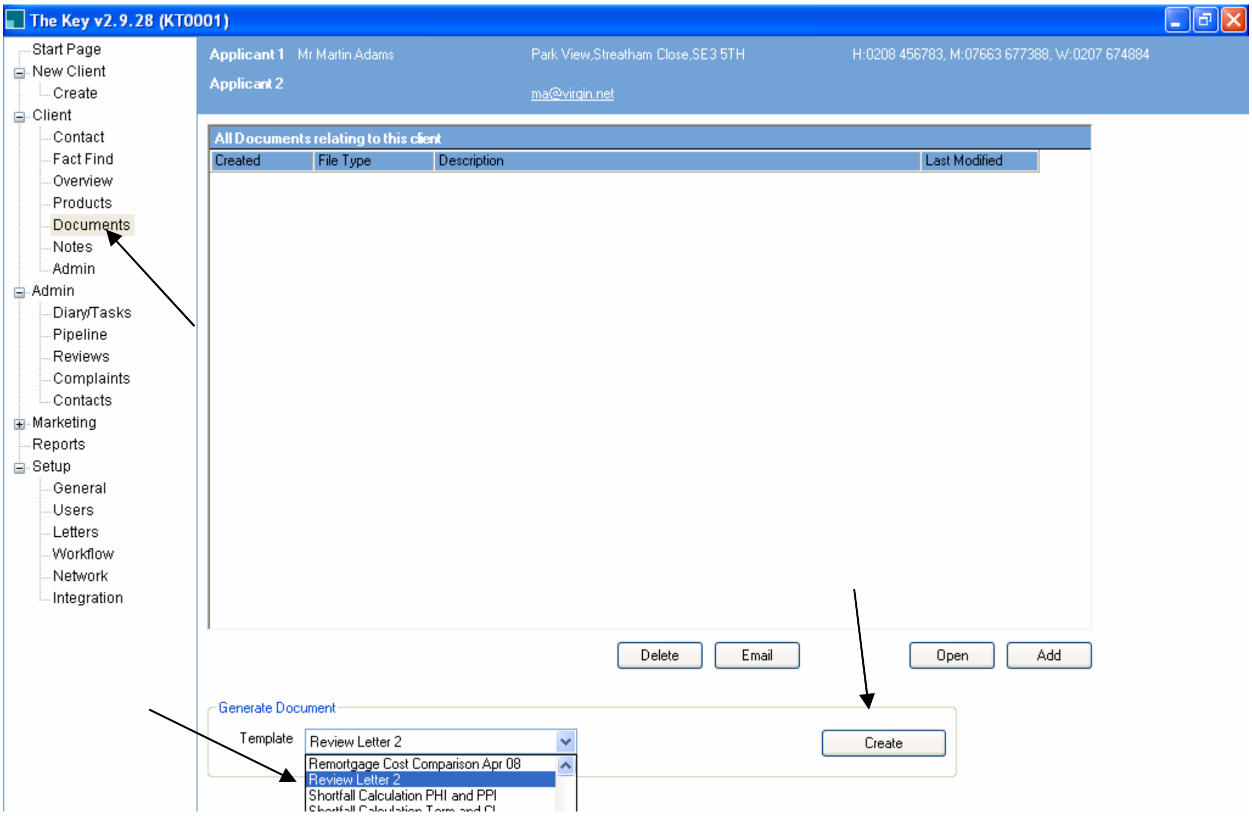
Once all the relevant merge fields have been inserted the document can be converted into Word for full editing by clicking on the **Edit in Word** button.

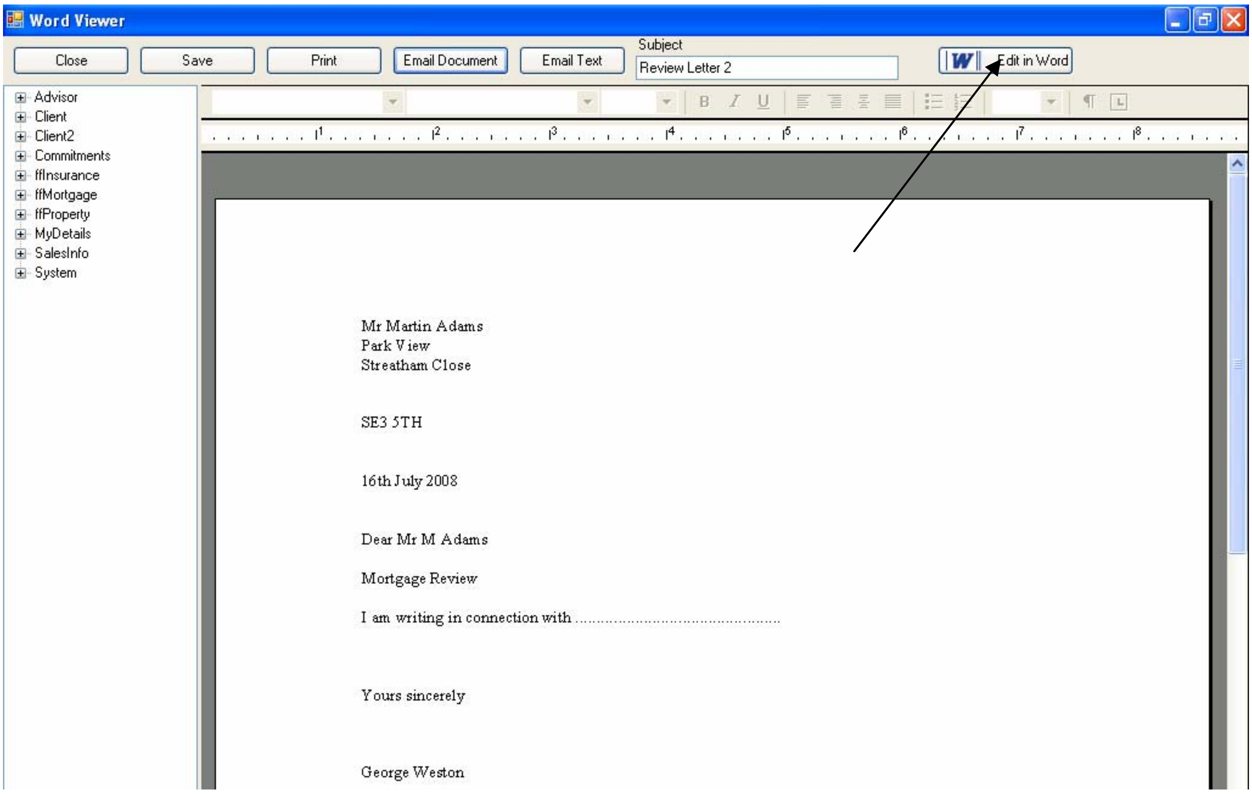
When finished close the document ensuring that it is saved and you will be returned to the **Letter template** screen where the document will now be listed as noted below.



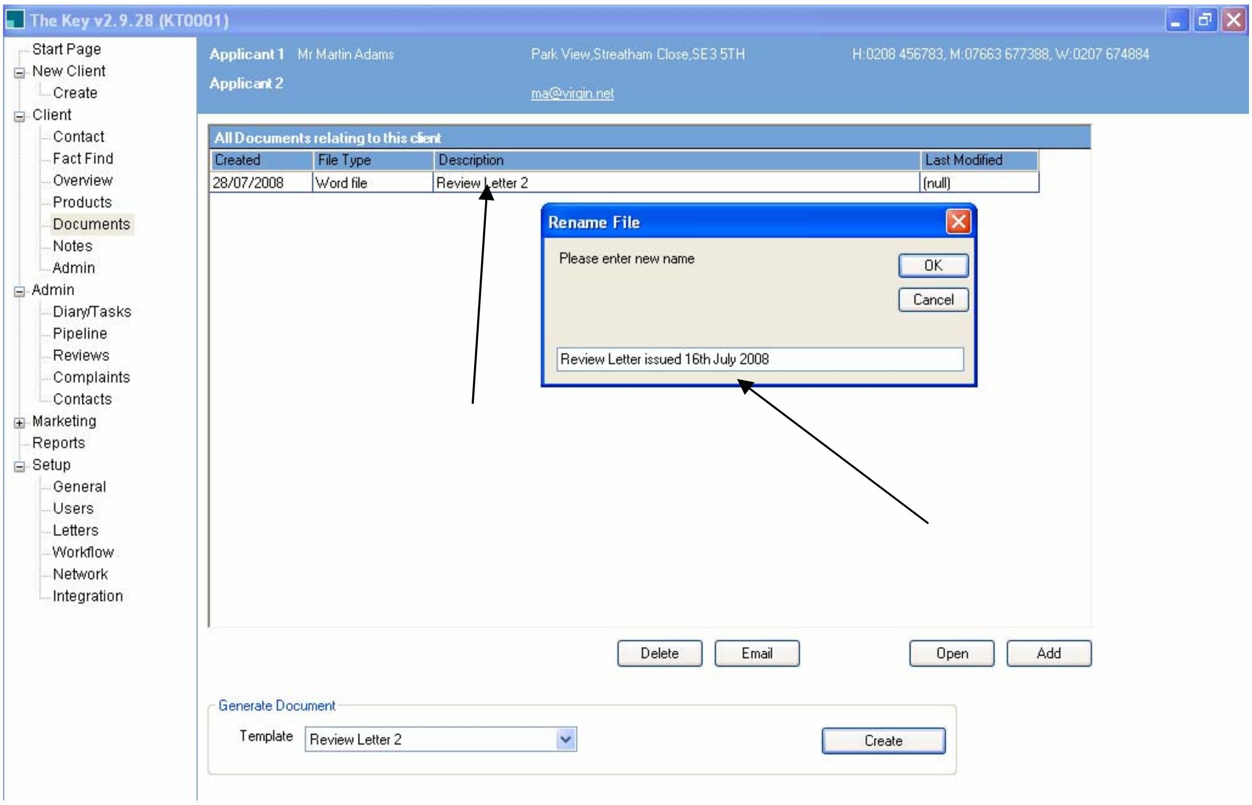
In order to access the document for a particular client click on the **Client Documents** area.

Click on the drop down box next to **Templates** in the Generate Document area which will display a list of documents held within the system including the newly created template. Click on **Create** to open up the template which will now be populated within any relevant client data.



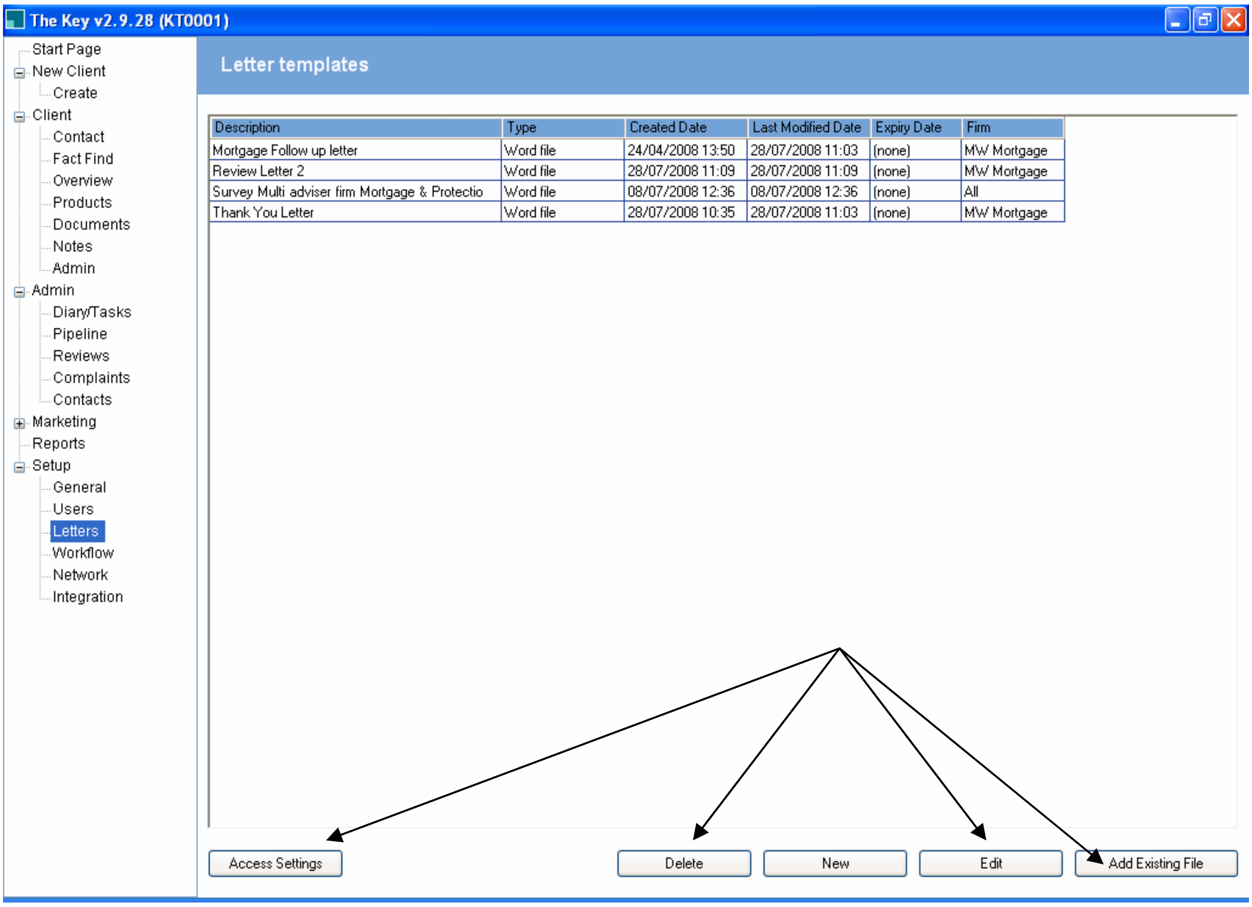


This document can be converted into Word for full editing by clicking on the **Edit in Word** button and when finished it should be **Saved** and **Closed** to return the document to the **Document** area of the relevant client.



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

There are a number of other options available at the bottom of the **Letter template** screen as follows:



Access Settings

- **Name**: Displays the current name of the document and allows the document to be renamed
- **Visible to Firm**: This should always list your own firm's name
- **Visible to single user only**: If ticked permits use of the document to a single user within the firm
- **Read Only**: If ticked the template cannot be edited within the Client Documents area

Delete: If clicked permits letter templates to be deleted if no longer required. A warning will be displayed to confirm that the document will be permanently deleted. This option is only allowed if the User has the relevant permission.

Edit: Allows existing letter templates to be amended as required

Add Existing File: Allows an existing Word document held outside of The Key to be copied into the system to avoid the need to retype information. Merge fields can be added to existing documents as detailed above.