

Release Notes 2.9.35

The purpose of this Release Note is to confirm changes that have been made to the system in version 2.9.35.

Amendments have been made to the following areas:

- 1) Link to Trigold within Mortgage product screen
- 2) Link to Halifax GI web system within Insurance Fact Find
- 3) Link to eConveyancer within Mortgage Product screen
- 4) Inclusion of Sesame Insure Hyperlink when quoting for GI
- 5) Working Offline – user guide created
- 6) User Guides

1) Trigold

Following the recent announcement in Mortgage News (MN09-006) it is now possible for Trigold users to source from within The Key. Client data entered into The Key is pre-populated into Trigold sourcing and KFI's and research from Trigold are now returned to The Key.

Note: In order for the integration to work, you must ensure that you have upgraded your version of Trigold Prospector to Version 8.1.36, which Trigold recently made available. If you are currently using a previous version, simply click '**Update**' within Trigold to upgrade automatically.

A new User Guide has been created **Products and Mortgage Sourcing using Trigold** which details the process. The user guide can be found at http://www.thekey.uk.com/sesame_thekey.aspx

The existing **Products and Mortgage Sourcing** user guide has been updated and now relates to Mortgage Brain only.

2) Halifax GI

It is now possible to link to the Halifax GI quotation system in order to produce quotations and apply for Buildings and Contents business. Client data entered into The Key is pre-populated into the Halifax GI web system, however at this time documentation will not be automatically returned to the Key and would need to be printed and scanned back into the system. It is intended that this functionality will be developed to facilitate this process.

A new User Guide has been created **Products and Quotes using Halifax** which details the process. The user guide can be found at http://www.thekey.uk.com/sesame_thekey.aspx

3) eConveyancer

Following feedback from a number of users a link has now been included within the Mortgage Product area which allows advisers to produce a conveyancing quote from **eConveyancer** which is then held within the Documents area of the Key.

The system also allows comparison quotes to be completed, additional quotes to be produced and for the relevant solicitor to be instructed from the same area, however at this time, this documentation will not be automatically returned to the Key and would need to be printed and scanned back into the system. It is intended that this functionality will be developed to facilitate this process.

Please note that in order to use this service you must be registered with eConveyancer. Registration can be completed through the eConveyancer website located at:

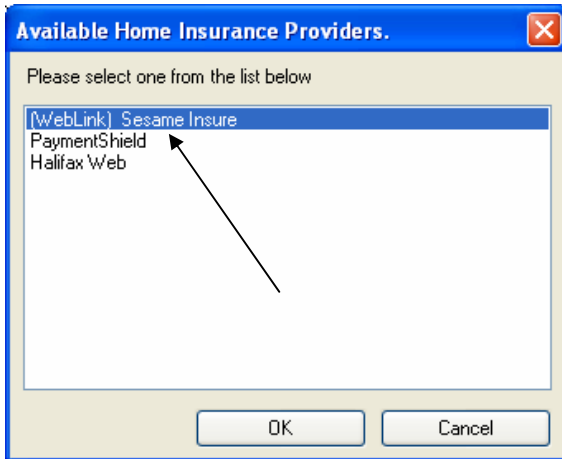
<http://www1.utdgroup.com/legal/mortgagebroker/home.asp>

Further contact details for eConveyancer can be found in the Contact Sheet user guide.

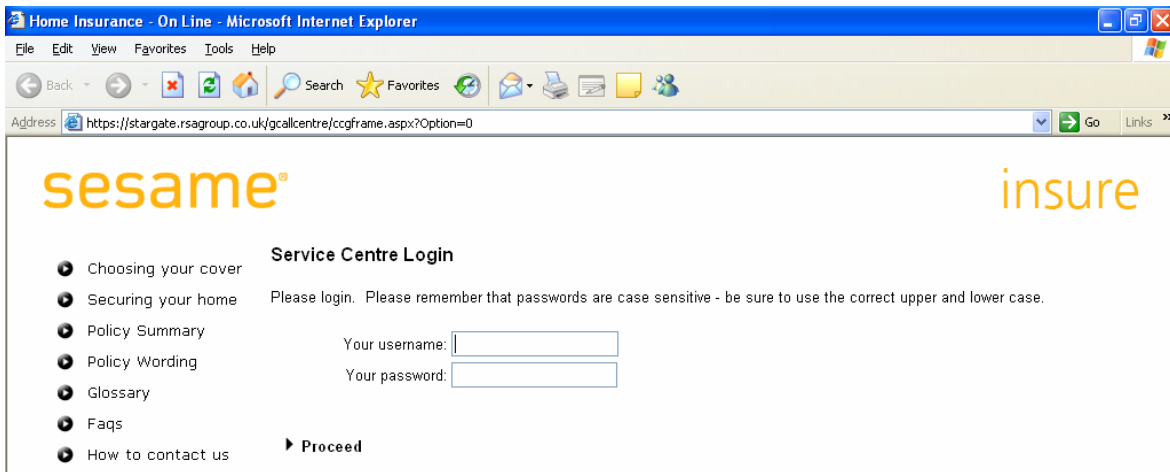
A new User Guide has been created entitled **Using eConveyancer with the Key** which details the process. The user guide can be found at http://www.thekey.uk.com/sesame_thekey.aspx

4) Sesame Insure

A hyperlink to the Sesame Insure website has been included when quoting from the PPI and Buildings and Contents areas of the GI Fact Find. When the Quote button is clicked this will open up a box highlighting the GI integrations available as follows:



Click on the Sesame Insure Hyperlink, click **OK** and this will open up the Sesame Insure website to allow relevant quotations to be produced.



NB there is currently no prep-population into Sesame Insure from the Key or document return into the Key however this information can be manually input via the Product Insurance area.

5) Working Offline

The Key can be used off-line when visiting clients at their home or whenever an Internet connection is not available. Off-line working allows client data to be input and amended which can then be synchronised with the main database when an internet connection is available e.g. when returning to the office.

An off-line database must initially be created while connected to the internet and a new user guide has been developed entitled **Working Offline** which details the process. The user guide can be found at http://www.thekey.uk.com/sesame_thekey.aspx

The off-line process is currently being redeveloped and in a future release will allow individual clients to be selected to work off-line. The user guide will be updated accordingly when these changes take effect.

6) User Guides

A number of user guides have been amended to reflect changes to screens within the latest release which can be found at http://www.thekey.uk.com/sesame_thekey.aspx