sesame®

Release Notes 3.0

the key

The purpose of this Release Note is to confirm changes that have been made to the system in version 3.0

1. **Provider Names –** as confirmed in the pre-release note issued on 2nd July, in preparation for launch of eNBS through the Key**,** we have changed the provider field names throughout the system from an editable list to a drop down menu, and will be replacing provider names used with standardised name.

2. **Sesame Extranet ID** – this is a new field in the User Setup area and is required to enable eNBS to be sent through the Key. You should ensure that each adviser within your firm has now input their Sesame Web-login into the Setup User area of the system. Further guidance on this was included in the pre-release note issued on 2nd July.

A copy of the Pre-Release Note can be found at http://www.thekey.uk.com/sesame_thekey.aspx

The new release also contains a number of significant enhancements including:

3. **Workflow** – the ability for users to create their own worklists for use within the Product area
4. **Offline working** – the ability to select which clients to access offline
5. **Sourcing and Multiple KFIs** – sourcing is now accessible from the Mortgage Fact Find. Where multiple KFIs are produced within a single sourcing session, individual products will now be created enabling better recording of individual products and associated documentation
6. **Other Enhancements** – a number of other changes have been made to the system in the following areas:
   a. **Fact Find**
   b. **New Prospect Functionality**
   c. **Contact History**
   d. **Updating of client address**
   e. **Client Tasks**

3. Workflow

The **Workflow** function within the **Setup** area has been enabled to allow firms to create their own Worklists within the Product area to assist in administration of cases, tracking and diary management.

A new User Guide has been created "How to Create Your Own Worklists" which details the process. The user guide is available at http://www.thekey.uk.com/sesame_thekey.aspx

4. Offline working

The offline synchronisation process has been amended. Following creation of an offline database an option is now given to select the clients to be made available when working offline. The benefits of this process are:

- Any clients taken offline will be locked as read-only within the online database avoiding any conflict of data as two records cannot be updated at the same time
- Only data that has been changed will be synchronised therefore reducing the time to synchronise data
- When working off-line clients that have not been selected will still be available **read-only** for reference.

The **Working Offline** user guide has been updated to reflect the new process which can be found at http://www.thekey.uk.com/sesame_thekey.aspx

5. Sourcing and Multiple KFIs

Sourcing – Mortgage Sourcing is now available from the Mortgage Fact Find as well as the Product area providing greater flexibility when sourcing a product.

It is however recommended that the fact find is completed as far as possible prior to sourcing in order to benefit from pre-population of client data from the Key into the sourcing product.

Multiple KFIs – where multiple KFIs are produced within the same sourcing session, each KFI produced will create a separate mortgage product within the **Products** area.

This will ensure that each product contains only data and documentation relevant to the individual mortgage case.

The **Products and Sourcing** user guides for both Mortgage Brain and Trigold have been updated to reflect the above changes and are available at http://www.thekey.uk.com/sesame_thekey.aspx

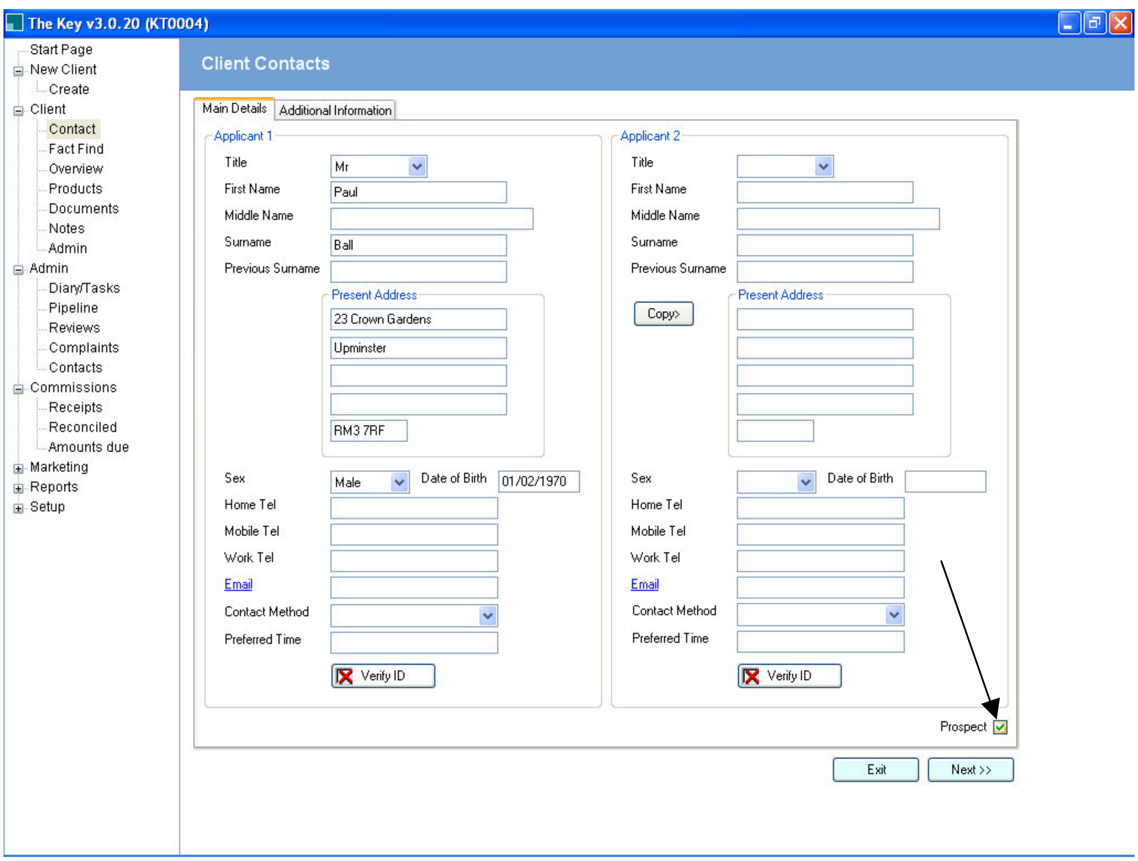
6. Other Enhancements

a. Fact Find

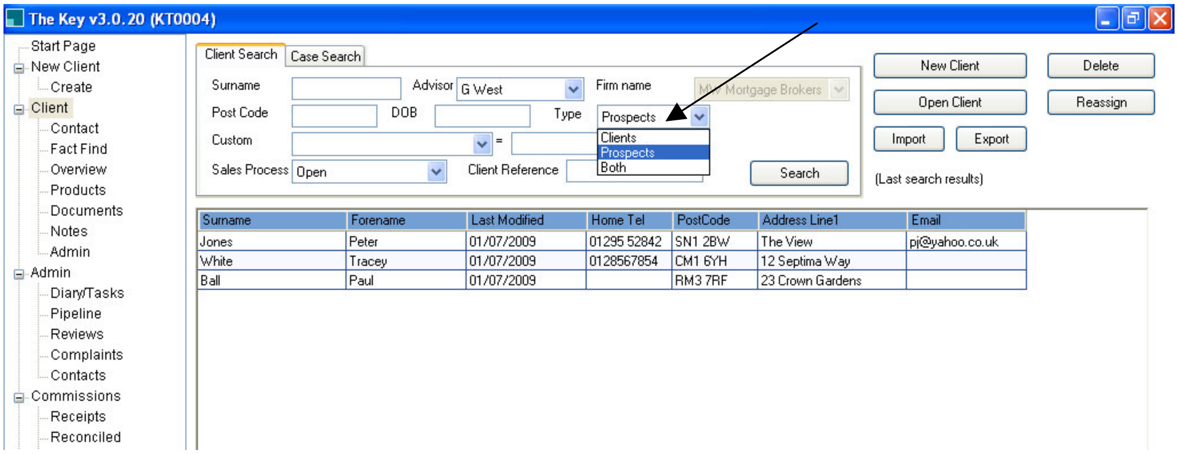
- A **Next** button is now included to enable easy navigation through the Fact Find
- System mandatory questions (which turn the tabs from a red cross to a green tick) are now displayed
- Tabbing sequences have been improved to allow users to logically navigate through each screen
- Buy to Let – a new question has been added to enable recording of Expected Rental Income (Fact Find > New Mortgage > Property)

b. New Prospect Functionality

It is now possible to enter individual details into the Key and to register the individual as a Prospect instead of a Client. This may be useful where a basic enquiry is received and it is unclear whether this will proceed to the next stage of the advice process.

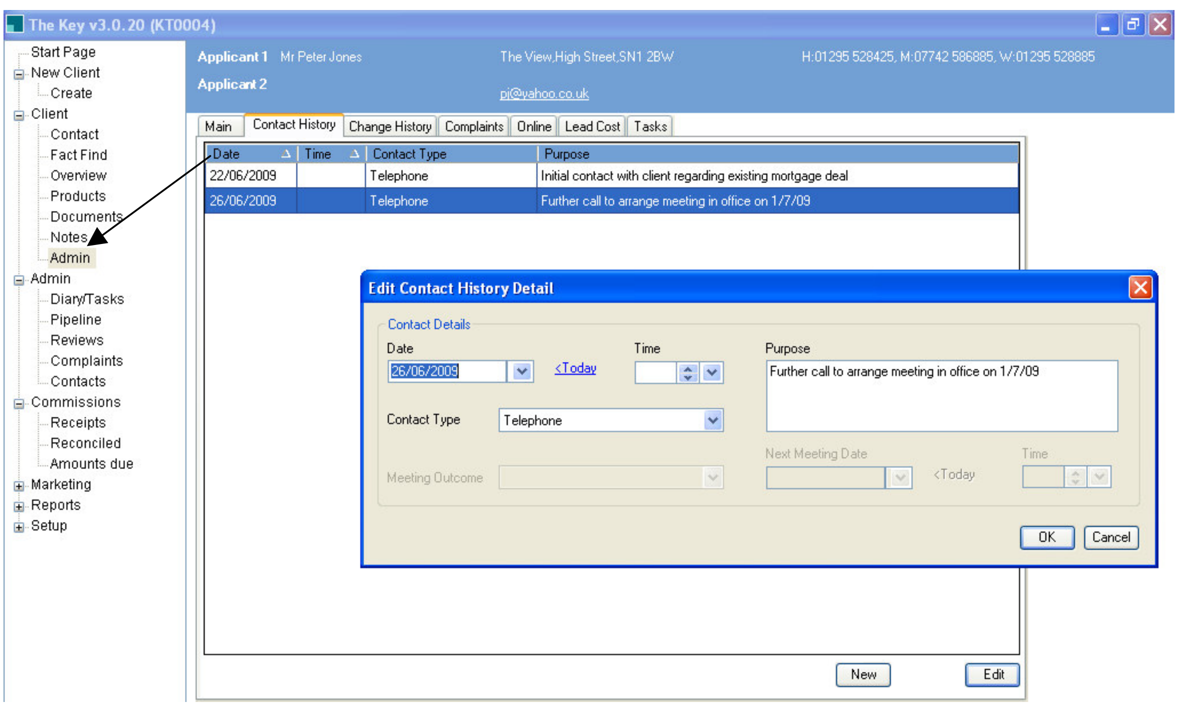


- A check box for **Prospect** is displayed in the **Client Contact** screen as shown above which can be checked when the individual is created on the key
- If a client has one or more products entered then the ability to make the client a prospect is disabled.
- The prospect can be converted to a client by unticking the **Prospect** box
- The Fact Find and Product screens will not be available to prospects
- On the **Client Search** screen, a new question is included in the **Client Search** tab called **Type** and a drop down list included with the options of Clients (default setting), Prospects or Both (see screen shot below)



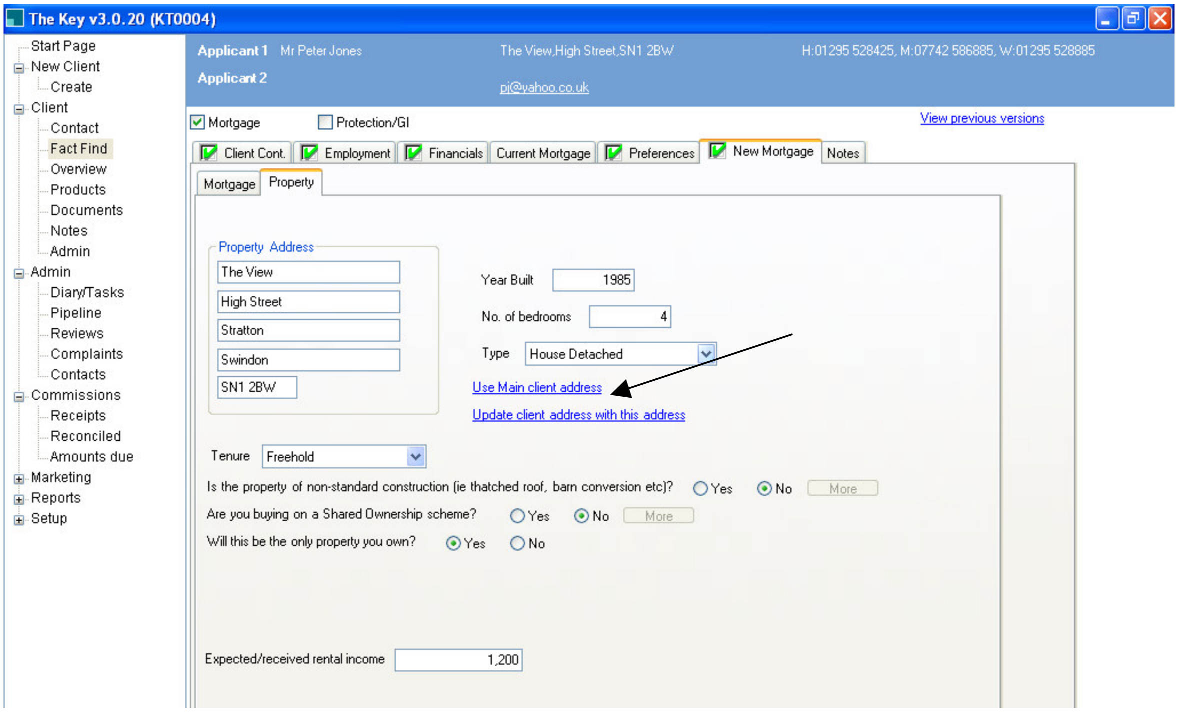
c. Contact History

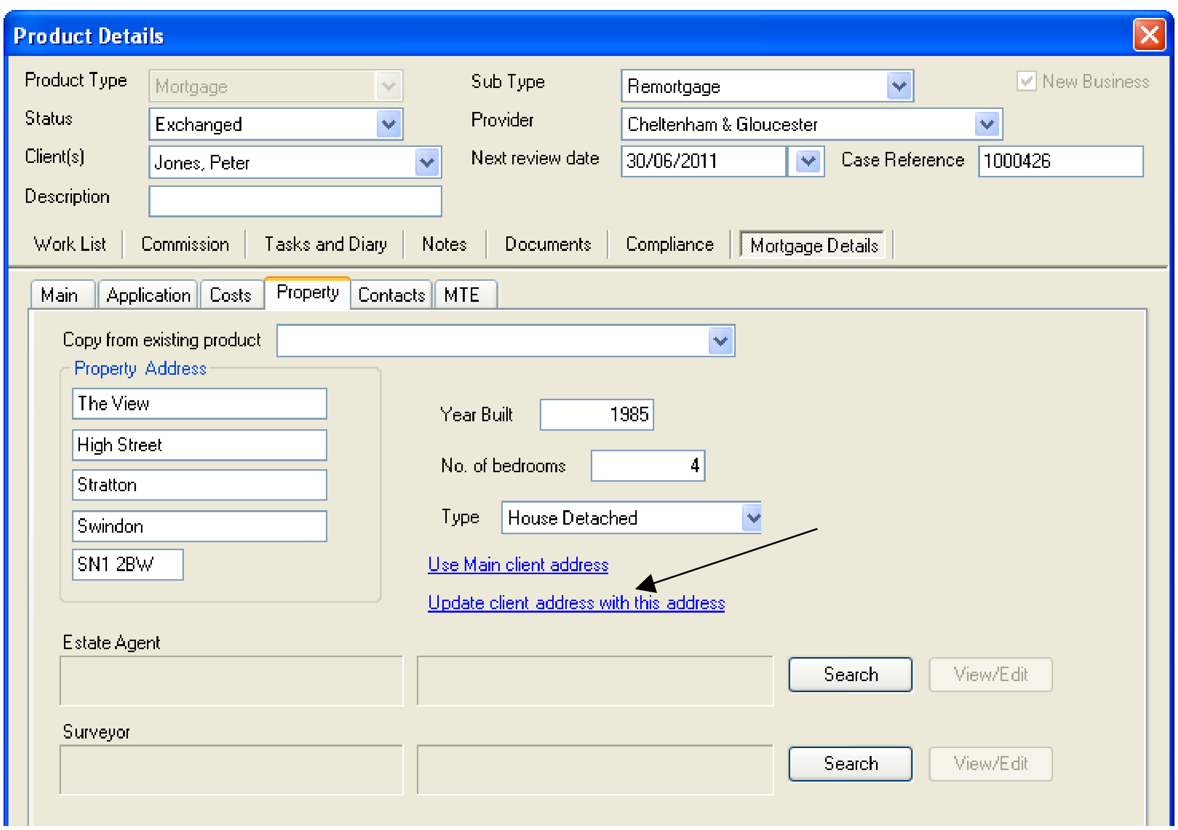
A new **Contact History** area has been added to the **Client Admin** screen. This provides a central place to record contact with a client for events such as meetings or telephone conversations and to record the outcome.



d. Updating of client address

The **Fact Find > New Mortgage** and **Product > Property** tabs now include a link to update the client's new address to their current address in the **Client > Contact** screen and to move the current address to the previous address held on the **Client > Fact Find > Client Cont.** screen. The field is labelled **"Update client address with this address"** and is shown below.





e. Client Tasks

Tasks can now be created for a client without being associated with a product. These tasks can be added via the **Client** > **Admin** > **Tasks** area which will also list any existing tasks added via the **Product** area.