



Release Notes

Welcome to the Key Version 3.2

After listening to current users of **the Key**, we have focused on usability and functionality to improve user experience and efficiency. Feedback will continue to play a significant part in future versions, so we can ensure our development remains closely aligned to the needs of our users.

New and Improved Features

To view details on particular updates click on the links below:

1. **Integration with The Exchange Protection Portal 'Exweb'** [Click here](#)
2. **Single new business submission (eNBS) screen** [Click here](#)
3. **Configurable Grids** [Click here](#)
4. **Client Details** [Click here](#)
5. **Commissions enhancements** [Click here](#)
6. **Workflow changes** [Click here](#)
7. **Other changes** [Click here](#)

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 Exweb licences** – If you haven't already got an 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**



1. Integration with 'Exweb'

A two-way integration with Exweb has been delivered enabling users to source protection products via the Insurance Fact find area for the following products:

- Term Assurance
- Critical Illness
- Combine Term and Critical Illness
- Income Protection

There is also the ability to source Whole of Life products via **Client > Products** screens

Launch sourcing from fact find

Protection sourcing will be available once the **Insurance > Cover Required** questions have been answered and Term and Cover Amounts have been captured.

The screenshot shows the 'Cover Required' section of the insurance fact find application. It includes a sidebar with navigation options like 'New Client', 'Client', 'Admin', 'Marketing', and 'Reports'. The main form area contains several questions and input fields:

- Applicant 1:** Mr Test Client, Test Street, Test Town, TE03 5RF, H:00000 000 000, M:11111 111 111, W:22222 222 2
- Applicant 2:** Mrs Demo Client, Test@test.co.uk, H:00000 000 000, M:33333 333 333, W:44444 444 4
- Navigation:** Mortgage, Protection/GI, Client Cont., Employment, Financials, Current Mortgage, Preferences, New Mortgage, Insurance (checked), Existing Plans, Notes.
- Tabbed Interface:** Cover Required (selected), Life Protection/Term, Critical Illness, Income Protection, PPI, Buildings/Contents.
- Questions and Answers:**
 - Who is the protection for? Joint
 - What is the cover required to protect? Mortgage / Loans
 - Protection required for? First Death
 - What level of cover would be required £? 150,000
 - Over what period is cover required? 20 Years
 - Have you smoked in the last 12 months? No
 - Are you in good health? Yes
 - What basis of cover? Decreasing
 - Do you want the certainty of knowing the cost of cover does not change throughout the term? (Guaranteed Premiums) No
 - If NO to certainty of premium do you understand that premiums may increase when they are reviewed? Yes
 - Do you require Waiver of Premium? No
 - Do you require Terminal Illness Benefit? Yes
 - Combine Critical Illness Cover? Yes** (highlighted with a red box)
 - Do you require the contract to be assigned or written under trust? No
 - Are there any material facts that should be disclosed relating to any medical conditions, claims history etc? No
- Buttons:** Print Preview, Next >>, Mortgage Sourcing >>, and a Quote button (highlighted with a red box).

Hints & Tips

- A new question has been included within the Life/Protection Term screen to indicate whether quotes should include Critical Illness, if Yes, the CIC screen must also be completed
- Quotes launched from the CIC screen will be performed as CIC only policies
- To perform standalone Term policies, this question will need to be set to no, or the requote function used



Accessing Exweb

Once the quote button has been selected the user will be presented with a log in screen:

The user must then select one of the product sub types that are available within Exweb.

Hints and Tips

- The log in screen can be bypassed if the user enters their Exweb account details in **Set Up > User > Logins**
- The Free navigation option takes the user into Exweb, but all integration links will be lost

Performing Quotes

Any data that is pre-populated into Exweb will initially be locked/non-editable until the first comparison is produced.

Default settings will also be applied within Exweb to any data not pre-populated. Data locked can only be reactivated upon selection of the Requote function in Exweb.

Once all data fields have been completed or changed, the user can generate a Comparison quote by selecting Company Select.



Help Preferred List Support

Comparison My Ref. 481

Companies	Product Name	Variations	Monthly Premi	Sum Assured	Refine Quote	Apply Online
Aviva	TA (paper)		33.20	150000		
Aviva	TA (elect)		33.20	150000		Apply
LEGAL & GENERAL	LTA (E)	View	33.23	150000		Apply
Aviva	Simplified		33.28	150000		Apply
AEGON SE	Term Ass (e)	View	33.45	150000		Apply
AEGON SE	Term Ass.	View	33.45	150000		
ZURICH LIFE	LPP - E		34.02	150000		Apply
ZURICH LIFE	LPP - P		34.02	150000		
FRIENDS	Term.	View	34.15	150000		Apply
FRIENDS	eSelect.	View	34.15	150000		Apply
FRIENDS	Term Menu.	View	34.15	150000		Apply
PruProtect	PruProtect		34.77	150000		Apply

Mr Test Client 19/06/1970, Mrs Demo Client 13/02/1970, Term Assurance. Whole of Market

Click on company name to obtain individual company quote and print

Quote Aids **Set Defaults** **Comparison Print** **Requote**

Once in the Comparison quote screen, users must select **Comparison Print** in order to return it into The Key. And in order to return any single company quotes, users must also select the appropriate product (as highlighted above), which will then display the screen below, and the user must again select **Print**

Help Preferred List Support

Benefits **Notes** Terms **Show Input** My Ref. 481

LEGAL & GENERAL: Level Term Assurance (E)

This is a Regulated Product.

Product Type	Term Assurance
Monthly Premium	£33.23
Type	Guaranteed Premium rates
Cover Period	20 years.
Number of Premiums	240

Life Cover £150000 payable on 1st death.

Critical Illness Cover

Terminal Illness Cover Included

Date Obtained: 09/11/2009

Click on "Apply" to complete and then submit a new business application using the information in this quote.

Apply **Back** **Print** **Requote**



Hints & Tips

- **Apply** – The user can apply for the product
- **Back** – The user can return to comparison table and select another single company quote from the list
- **Requote** – The user can return to data input screens and amend to generate a new comparison quote
- **Close Exweb** – the user will be returned to The Key with all associated product documentation and product information that have been selected for Print

Auto-creation of Products

For each Illustration produced/printed in Exweb a corresponding protection product will be created within The Key and can be viewed in the **Client > Products** area.

FACT-HING
Overview
Personal Details
Products
Documents
Notes
Admin
Admin
Diary/Tasks
Pineline

All Current Products 4 product(s) found. [Click here to customise results.](#)

Type	Provider	Basis	Status	Address	Review Date	New Business	Created	Submission Status
Mortgage	Abbey National	Purchase	Proposed	New House	06/11/2011	<input checked="" type="checkbox"/>	06/11/2009	Ready to Submit
Mortgage	Nationwide BS	Purchase	Proposed	New House	06/11/2011	<input checked="" type="checkbox"/>	06/11/2009	Success
Insurance	AXA Sun Life	Combined Term / CIC	Proposed			<input checked="" type="checkbox"/>	06/11/2009	Submitted Externally
Insurance	Legal & General Assu...	Term Assurance	Proposed			<input checked="" type="checkbox"/>	09/11/2009	Ready to Submit

The relevant Illustration and Comparison quote documents will be returned against each product and any product specific data will also be returned to the product.

Please note: If no prints are performed, then no products or documents will be created and returned. If only Comparison quotes are printed then a 'Skeleton product' will be created i.e. a product with no provider specific information. Users will however still be able to return to this comparison quote in Exweb from this product and subsequently select single company quotes.

Requote – Returning to Comparison Quotes

Within each product that has been created there is a **Review/Refine/Requote** function as highlighted below. By clicking on this button, users will be returned to the Comparison quote screen in ExWeb.

Product Details ✕

Product Type: Sub Type: New Business

Status: Provider:

Client(s): Next review date: Case Reference:

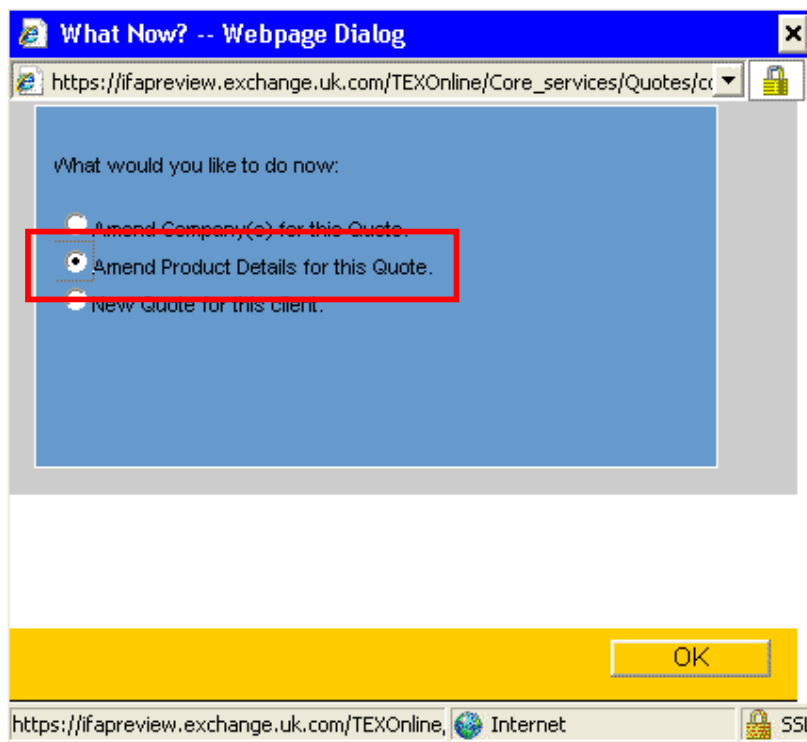
Description:

Review/Requote/Apply

Work List | Commission | Tasks and Diary | Notes | Documents | Compliance | Insurance



Once within Exweb, users can opt to either select an alternative Product from the Comparison table to return into The Key, or to select **Requote**. If Requote is selected the user is presented with the screen below, and by selecting option 2 can perform a new quote.



Apply – Returning to Comparison Quotes

Within each product that has been created there is a **Review/Refine/Requote** function. By clicking on this button, users will be returned to the Comparison quote screen in Exweb.

Once within Exweb, users can opt to select the relevant product and **Apply** for this product. The user will then be taken directly into the Providers website to apply directly.

Hints & Tips

- Ensure that the quotes are still valid, these typically last for 31 days
- When linking off to Providers websites to apply for products, the integration with The Key will cease and no documentation will be returned against the product.
- Where multiple products are returned into The Key, it is important that users manage the product statuses. Products not proceeding should be updated accordingly e.g. "Not proceeded with". Users will be prompted to Close the product and by doing so will result in the product no longer appearing in the Pipeline area



2. Single Screen - Electronic New Business Submission (eNBS)

In Version 3.0 we introduced a facility to enable advisers to submit new business directly to Sesame via The Key, without the need to log into the Sesame website.

We have now delivered enhanced functionality that makes the process even easier and useful to users of The Key, features include:

- Single submission screen
- View previous submissions
- Tracking submissions

Single Submission Screen

The single submission screen makes it even easier for advisers to submit business via The Key, collecting all of the required eNBS data into one screen, enabling users to enter any missing information and validate the accuracy of information prior to submission. This is shown in the screen below:

Once successfully submitted, all data completed within the single screen will be locked down and uneditable. Corresponding data fields in the product area will remain editable, but will have no effect on the submission.



View Previous Submissions

Any new business submissions that are sent via The Key can now be viewed by clicking on the eNBS button.

Users will be taken into the single screen and can view the data previously submitted, but will be unable to change any data or to resubmit the business to Sesame.

Please note: users cannot view Submissions sent prior to this release

Tracking Submissions

A new display field has been added in both the product and pipeline area, which allows the user to see the submission status of all of your new business:

Fact Find	All Current Products	4 product(s) found. Click here to customise results.						
Overview								
Personal Details								
Products	Category	Provider	Basis	Status	New Business	Created	Submission Status	CorporateReference
Documents		Abbey National	Purchase	Proposed	<input checked="" type="checkbox"/>	06/11/2009	Ready to Submit	
Notes		Nationwide BS	Purchase	Proposed	<input checked="" type="checkbox"/>	06/11/2009	Success	401436846
Admin		Term Assurance	AXA Sun Life	Combined Term / CIC	Proposed	<input checked="" type="checkbox"/>	Submitted Externally	
Admin		Term Assurance	Legal & General Assu...	Term Assurance	Proposed	<input checked="" type="checkbox"/>	Ready to Submit	
Diary/Tasks								
Pipeline								

New Business	Created	Submission Status	CorporateReference
<input checked="" type="checkbox"/>	06/11/2009	Ready to Submit	
<input checked="" type="checkbox"/>	06/11/2009	Success	401436846
<input checked="" type="checkbox"/>	06/11/2009	Submitted Externally	
<input checked="" type="checkbox"/>	09/11/2009	Ready to Submit	

There are 5 statuses:

- **Ready to Submit** – eNBS has not been submitted
- **Externally Submitted** – eNBS has been submitted externally outside of The Key
- **Submitted** – eNBS has been submitted via The Key and is pending successful receipt into Sesame's systems
- **Success** – eNBS submitted via The Key has been successfully received into Sesame's systems
- **Error** – eNBS submitted via The Key has failed and you need to contact POS@sesame.co.uk for guidance to correct

Sesame eNBS Reference Number

The Sesame eNBS reference number will be returned into the product area, once the status changes to Success

Insurance Links			Mortgage Software Links		
ASU/PPI	Home	Term/Life/CIC	Mortgage Sourcing	MTE	Conveyancing
<input type="checkbox"/> Submitted Externally		eNBS	Sesame sale ref	<input type="text" value="401436846"/>	Close



3. Configurable Grids

A number of screens now allow the user to customise the columns displayed, where available a link is displayed at the top of the grid, which will open the grid configuration screen with the options to add/delete/move columns within a list.

Client Search | Case Search |

Surname Advisor Firm name

Post Code DOB Type

Custom =

Sales Process Client Reference

Client search results : 1 client(s) found [Click here to customise results.](#)

Surname	Forename	Address Line1	PostCode	Home Tel	Email
Client	Test	Test Street	TE03 5RF	00000 000 000	Test@

(Client search screen customise link highlighted in red)

The following screens now include the column customisation feature:

- Client > Client Search
- Client > Case Search
- Client Products
- Admin Pipeline > Products
- Admin Diary > Tasks
- Admin Contacts
- Commissions > Amounts Due

Please note: Column changes will not be saved when working offline



The Grid Configuration screen shot below allows the individual screens to be adjusted. By using the arrow buttons, columns can be selected and reordered.

At anytime, the default columns can be restored by selecting the button at the bottom of the screen:

Grid Configuration

Configuration id: 1 Configuration name: ClientSearchResults

Available columns (Heading <column name>):

- Admin1 Branch <Admin1Branch>
- Admin1 Name <Admin1Name>
- Admin1 Username <Admin1UserName>
- Admin2 Branch <Admin2Branch>
- Admin2 Name <Admin2Name>
- Admin2 Username <Admin2UserName>
- Advisor Branch <AdvisorBranch>
- Advisor Name <AdvisorName>
- Advisor Username <AdvisorUserName>
- App2 Address Line1 <PresentAddress_Line1_2>
- App2 DOB <dob_2>
- App2 Email <Email_2>
- App2 Forename <FirstName_2>
- App2 Home Tel <Home_Tel_No_2>
- App2 Mobile Tel <Mobile_Tel_No_2>

Selected columns (Heading <column name>):

- Surname <Surname_1>
- Forename <FirstName_1>
- Address Line1 <PresentAddress_Line1_1>
- PostCode <PresentAddress_PostCode_1>
- Home Tel <Home_Tel_No_1>
- Email <Email_1>
- DOB <dob_1>
- Last Modified <Last_Modified_Date>

Available columns (Heading <column name>):

Heading	Type	Format	Alignment	Width	Sorting
Surname	String	None	Left	125	None
Forename	String	None	Left	81	None
Address Line1	String	None	Left	178	None
PostCode	String	None	Left	80	None
Home Tel	String	None	Left	112	None
Email	String	None	Left	188	None
DOB	DateTime	Date Only	Left	93	None
Last Modified	DateTime	Date Only	Left	99	Descending

Restore default configuration Save Cancel



4. Personal Details (Clients)

A new section added under Client allows the user to capture additional client related information within each tab detailed in the screenshot below:

The following tabs now include:

- **Personal Details** – Includes marital status
- **Employment Details** – Includes Years and Months calculation in Current employment
- **Health** - Includes Doctors details and National Insurance Number
- **Notes** – Notes added in this screen will be displayed within the Fact Find notes area
- **Custom** – 15 free text fields to include additional client information which are available as merge fields for letters

The screenshot displays the 'The Key v3.2.14 (KT0004)' application interface. On the left is a navigation tree with categories like 'Client', 'Admin', 'Marketing', and 'Reports'. The main area shows a 'Personal (Cont)' tab selected, with sub-tabs for 'Employment', 'Health', 'Notes', and 'Custom'. Two applicant forms are visible side-by-side. Applicant 1 is 'Mr Test Client' with address 'Test Street, Test Town, TE03 5RF'. Applicant 2 is 'Mrs Demo Client' with email 'Test@test.co.uk'. Both forms have fields for 'Smoker' (No/Yes), 'NI no.', 'Doctor Address', and 'Tel'. A 'Copy Address>>' button is between the doctor address fields. A 'Next >>' button is at the bottom right.

Hints & Tips

- These fields have been introduced to provide users with the ability to collect additional client information in a structured format that can be used to pre-populate letter templates.
- Data entered in Personal details will not be pulled through into the Print Preview document with the exception of **Notes**
- Those fields that appear under personal details as well as in the fact find are bi-directional, which means by changing or entering data in either area, will update in the corresponding fields



5. Commissions Changes

The new Commissions/Earnings Schedule, which has new fields and controls to allow for network splits and the facility to allow for corrections to the net amount. This is shown in the screen below.

Commission/Earnings Schedule

Basis: Indemnity | Commission Reason: New Business | Amount Paid £: 0

Date Due: 09/11/2009 | [<Today](#) | Date Paid:

Gross Amount £: 500.00 | Paid Method:

Deductions

Network £ 100.00 + % of (%100.00)

£ + % of (%0.00)

Net Amount £: 400.00

Renewal/Regular

Frequency: | Earnings Period: | Last Due Date:

Apply Splits

Allocate Payment | OK | Delete

Net Amount £: 400.00 (Original Amount £524.53, Correction -£124.53)

Renewal/Regular

Frequency: | Earnings Period:

The following changes have been made to the screen shown above:

- Inclusion of a new field titled 'Gross Amount £' – recording gross commissions returned from sourcing
- Deductions– enabling users to record deductions that need to be applied to the Gross Amount e.g. Network Retention. These can be applied either as % or £.
- 'Net Amount £' based on Gross Commission less any deductions.
- Upon Allocation of Payment, if the amount received is different from that of the Net Amount, then it displays and calculates the 'Original Net Amount' and 'Correction' based on the previous value held (as detailed in the screen shot above), this is further described below.



Commissions & Earnings Schedule > Allocation Detail Screen

There are many different scenarios that may apply when an advisor is ready to allocate a payment. The screen shot below shows the changes made to this section.

Allocate Payment

Reference

Date Received <Today

Amount Received £

Paid Method

Full payment received, update commission net amount

OK Cancel

Scenario 1:

If the option – ‘full payment received, update commission net amount’ is unticked, then the amount the broker allocates will be recorded in the ‘Amount Paid’ of the Commission / Earning Schedule window only. This will have no effect on the ‘Net Amount’ in commission / earning schedule, regardless of how many times the allocate payments with this option is unticked.

Scenario 2:

If the option - ‘full payment received, update commission net amount’ is ticked and if the amount being allocated is less than or greater than the initial Net Amount then the net amount correction will now appear on the Commission / Earning Schedule window. The amount allocated will also be recorded in the Amount Paid.

Scenario 3:

If the full payment received matches the original net amount, then the ‘Net Amount’ and ‘Amount Paid’ will balance and no Net Amount correction will be appear.

Note: Even though the payment may now balance, the advisor can still allocate further payments to this commission transaction. However if they choose to again use the ‘full payment received, update commission amount’ then the amount they have now allocated will be added to the existing Amount Paid figure and the Net Amount will re-adjust, thus displaying the net amount correction.

Adjustments will also be made to the Gross Amount figures accordingly.



Commission earnings – product

The enhancement made to this area means the commission will be handled at the individual fee level. The screen below shows the enhancements made to this area:

- **Gross & Net** – both Gross and Net Commission is now displayed
- **Splits** – a fix has been introduced and all split information will be pulled through to the relevant area automatically if Splits are applied

Product Details

Product Type: Insurance Sub Type: Combined Term / CIC New Business
Status: Proposed Provider: AXA Sun Life
Client(s): Client, Test & Client, Demo Next review date: Case Reference: 1048868
Description:

Work List: **Commission** | Tasks and Diary | Notes | Documents | Compliance | Insurance

Payment Schedules					
Description	Gross Amount	Net Amount	Date Due	Renewal/Regular	Use Splits
Indemnity	£500.00	£475.00	06/11/2009	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Splits

Introducer	£	50	0	% (£50.00)
Advisor: Jake Hunter	£		80	% (£380.00)
2nd Advisor	£		0	% (£0.00)
Remaining to firm				% (£45.00)

Introduction Grade

Introducer: JBE Introduces Mortgages
John Bond Evan

Submitted Externally Sesame sale ref:

Commission earnings – allocated

The changes to this area follow the same principle as that for the Commissions earning schedule. There is now the facility to reconcile actual received amounts for each allocation detailed against the total expected for the case.



Commission earnings – Setup

The set up area now includes the ability to set advisers default network splits so they are configurable at individual level. The screen shot below shows the enhancements made to this area.

User Details

Main Details Roles Permissions Training & Competence Logins

Primary Role Secondary Role Compliance Officer/Supervisor System Administrator

User is an Advisor

Default commission Split % or £

Administrator

Supervisors risk weighting (0=Low Risk, 50=High)

Compliance Officer

File Check all cases% Check the next

Last Audit [<Today](#)

Restrictions

<input type="checkbox"/> User can edit system settings	<input checked="" type="checkbox"/> Can edit introducer records
<input checked="" type="checkbox"/> User can view / edit / add users	<input checked="" type="checkbox"/> User can edit product details after application date is entered.
<input checked="" type="checkbox"/> User can view / edit / add letter templates	<input checked="" type="checkbox"/> User can edit case accounts
<input type="checkbox"/> User can view / edit / add network control templates	<input type="checkbox"/> User can attach documents when client data is readonly
<input checked="" type="checkbox"/> User can delete information	<input checked="" type="checkbox"/> User can use ad-hoc reports
<input checked="" type="checkbox"/> User can enter commission management	<input checked="" type="checkbox"/> User can use reports
<input checked="" type="checkbox"/> User can edit contacts after creation	
<input checked="" type="checkbox"/> User can reassign work	
<input type="checkbox"/> Client Data is Readonly	

OK Cancel



6. Workflow redesign

Some user interface improvements have been made to the **Set Up > Workflow** area to improve the ease of use. New tasks can now be inserted into an existing sequence and the following tasks will automatically re-order themselves.

Edit Work List

Seq	Description	Product Status	Priority	Task For
1	Application completed	Proposed	Normal	Administrator
3	Sent to lender	Submitted	Normal	Administrator
4	Exchanged	Exchanged	Normal	Administrator
5	Completed	Completed	Normal	Advisor

Task Detail

Description: Sequence:
Template:
Product Status: Days Due:
Priority: Task For: Advisor Administrator

Workflow List Details

Description: Branch:
Type:



7. Other Changes

- **Trigold provider names** – The Key will now automatically recognise and set the relevant Lender within the Product area
- **New Insurance categories** – to support the Exweb integration, some new Insurance Products have been added including, Term Assurance, Combined Term / CIC and we have also introduced a new option called “Category” which allow the appropriate classification of the Insurance Product e.g. Family Income Benefit, Mortgage Protection

The screenshot shows the 'Product Details' window with the following fields and options:

- Product Type: Insurance
- Sub Type: Term Assurance
- Status: Proposed
- Provider: Legal & General Assurance Society Limite
- Client(s): Client, Test & Client, Demo
- Next review date: [Empty]
- Case Reference: [Empty]
- Description: [Empty]
- Buttons: Review/Quote/Apply
- Tabs: Work List, Commission, Tasks and Diary, Notes, Documents, Compliance, Insurance
- Sub-tabs: Main, Other Details, Replacement
- Term Assurance section:
 - Category: Term Assurance (dropdown menu open showing: Term Assurance, Convertible Term, Renewable Term, Renewable Convertible Term, Family Income Benefit, Mortgage Protection, Gifts Inter Vivos, Level Decrement Term)
 - Sum Assured: [Empty]
 - Term Years: [Empty]
 - Benefit Basis: [Empty]
 - Guaranteed Premium: [Empty]
 - Waiver of Premium: Yes (radio), No (radio)
 - Terminal Illness Benefit: Yes (radio), No (radio)
- Buttons: Term/Life/CIC, Submitted Externally, eNBS, Sesame sale ref, Delete, Close

- **Nationality** – A new field has been added into **Fact Find > Client Cont.**
- **Passporting** – A new field has been added into the products area for all Insurance products. Select the appropriate country to confirm that the client has been advised in the UK or that a passport has been applied for in another EEA state (see Compliance Manual section 5.5 for further details). This is used to pre-populate eNBS
- **Fact Find > Existing Plans > Providers** – A more extensive list of additional Providers are available within the dropdown field
- **Fact Find > Current Mortgage > Lenders** – A more extensive list of additional Lenders are available within the dropdown field
- **Applicant 2 Email** – Added to contact information bar on most client screens



- **Administrators submitting eNBS for Advisers** – Administrators no longer require a Sesame Extranet ID in their user profile to be able to submit eNBS on behalf of advisers - indeed we recommend any administrators that have entered an ID to remove these
- **Client Search** – now includes a search option for Introducers
- **Commissions > Receipts** – now displays commission transactions when amounts due are negative values
- **Setup > Documents** – A new column has been added called “last updated by” to indicate the last user to change a letter template
- **Admin > Tasks** – new filter options have been added to the “Date” filter for “Next 7 days”, “14 days” and “1 Month”
- **Compliance training and competence records** – all users can now access this area via Setup Users screen
- **Reports access** – Access to the reporting area can now be restricted
- **Client Search DOB Filter** – this has now been corrected
- **Integration Log in details** are now available when working offline