Release Notes 3.3

The purpose of this Release Note is to confirm changes that have been made to the system in version 3.3.

New and Improved Features:

- Multi-sale
  1. Fact Find Summary screen
  2. Creating IDDs
  3. Recording of Notes
- Ad-hoc Reporting
- Marketing
- Other changes

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**

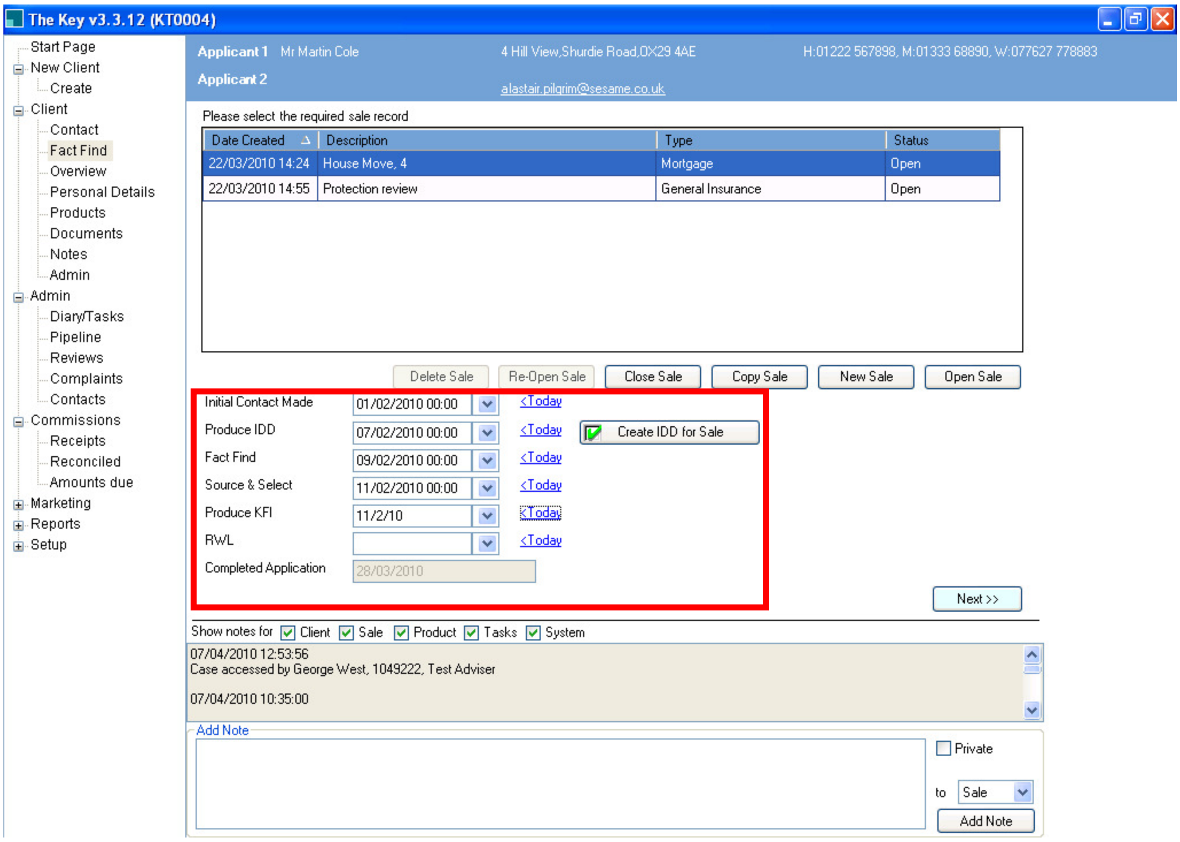
Multi-sale

This is a major enhancement to the system which now enables more than one sale to be recorded within the Key simultaneously. This is particularly useful for mortgage and insurance business where a client may have more than one mortgage or insurance need at the same time. Any fact finds, product details and other documentation can now be stored against the specific sale they relate to rather than in a single list.

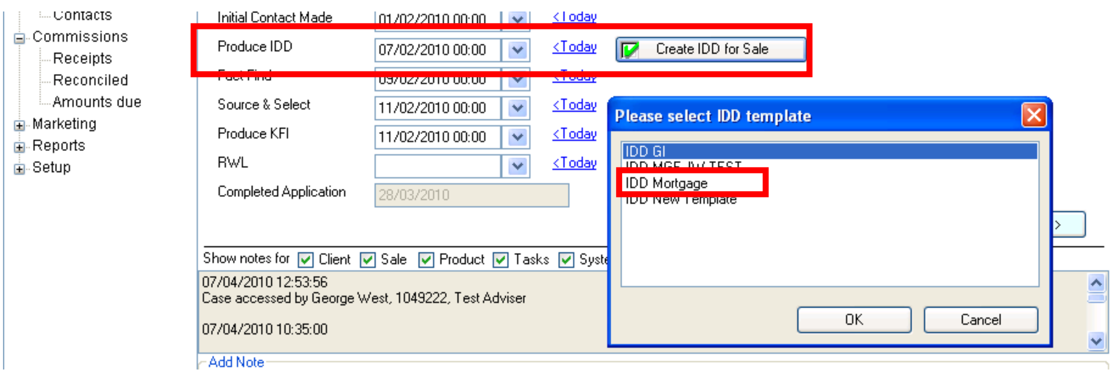
This new function will also assist users when revisiting a client for repeat business which will allow any historic information product information and documentation to be stored within their own sale record.

When creating a new sale any existing mortgage or insurance products (recorded as “Current”, “Completed” or “In-force” will be transferred into the new Fact Find. Additional prompts have also be been included to close any existing products at the time of creating a new sale.

1. Fact Find Summary Screen: A Fact Find Summary screen has been introduced as part of this process which will enable an audit trail of dates to be recorded against individual sales including fact find start dates and issue dates of the IDD. A sample Fact Find Summary screen is shown below:



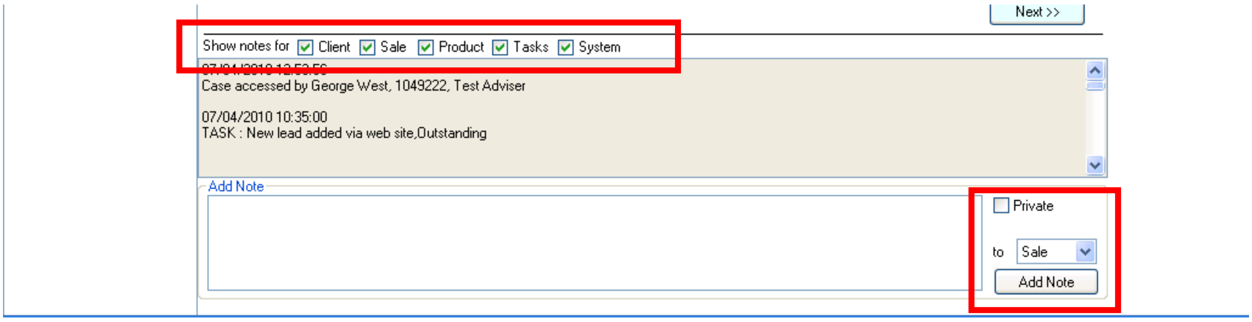
2. Creating IDDs – the **Create IDD for Sale** button on the Fact Find Summary screen now provides an easy way to attach an IDD to a sale record. By clicking on the button this will display any IDD templates that have been created in the **Setup > Letters** (prefixed with the letters “IDD”). The appropriate IDD can then be opened and saved which will be recorded in the **Client > Documents** area of the relevant sale.



3. Recording of Notes – an additional function has been introduced which allows Notes to be added to either the Client record or to a specific Sale. Client notes will appear on all future sales whereas Sale notes will only be attached to the Sale they relate to.

The Client or Sale notes can be prevented from appearing on the printed Fact Find by ticking the **Private** box.

An option is also included so that a user can decide which notes to display in each of the Notes areas on the system.

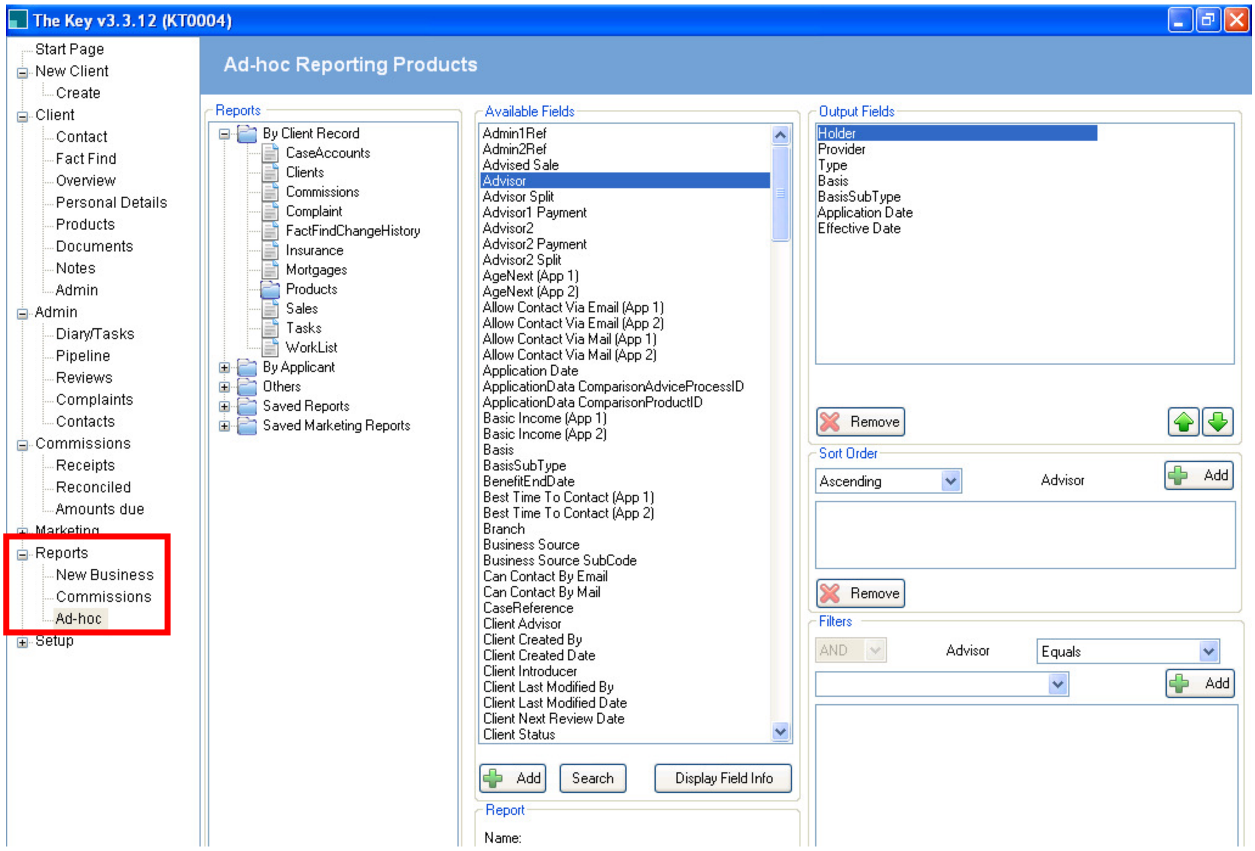


A new user guide has been created called **Using Multi-sale** which provides a detailed overview of how the above new functionality operates.

Ad-hoc Reporting

A new facility has been introduced so that reports can be created at an individual firm level. These reports can be used to extract any data that has been entered into the system to produce valuable Management Information.

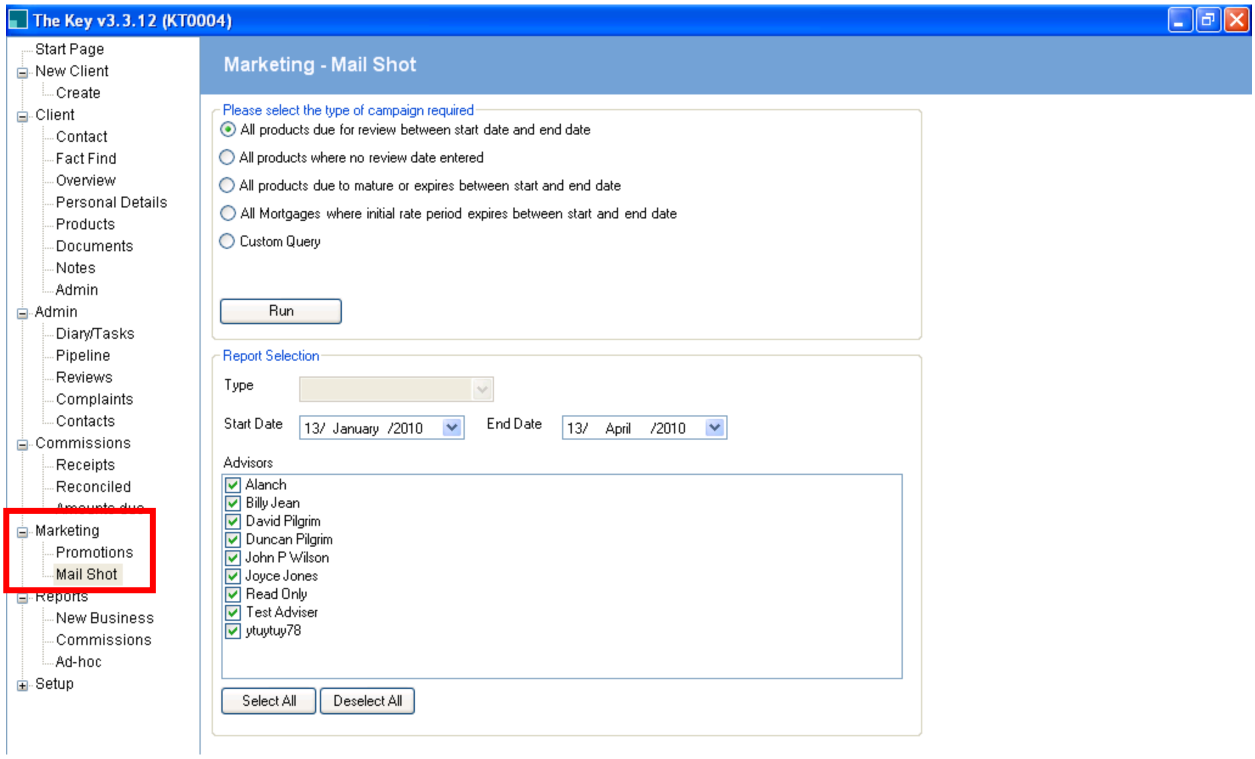
The Ad-hoc Reporting function is available within the Reports area with access being controlled through a user permission within the **Setup > Users** area.



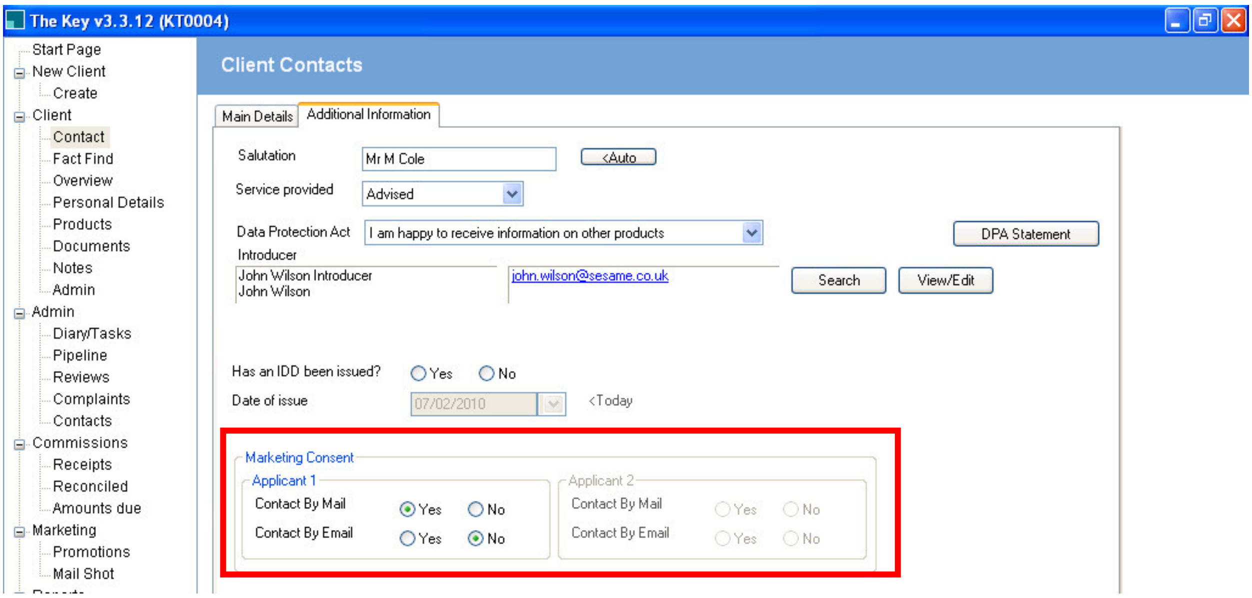
A new user guide has been created called **Using Ad-hoc Reporting** which details how to create and save reports within the Ad-hoc area.

Marketing

The Marketing area has been improved to enable Mail Shots to be produced based on pre-set reports or from data created through the ad-hoc reporting function.



Mail Shots created through the **Custom Query** option use new Marketing Consent questions that have been created in the **Client > Contact > Additional Information** tab.



A new user guide has been created called **Using the Marketing Mail Shot** area which details the Mail Shot process.

Other Changes

- **Client > Product Details** – New option added to Delete Work lists. This option requires a user to have the Delete user permission
- **Product > eNBS** – mortgage application date now written back to Product > Application tab
- **Product > eNBS** – improved validation to ensure future dates cannot be entered and applicant details always recorded
- **Reports** – option added to Select/Deselect All advisers when creating reports
- **Setup > Users > Delete** – improved validation will now prevent a user from being deleted until all clients, products and tasks have been re-assigned
- **Setup > Users** – new function added allowing users to unlock clients. User must have Edit Users permission to perform this function
- **Documents > Email** - When sending emails from the Key via Outlook the Outlook default mail signature is now included. NB: this function is not included in Outlook 2000 however the signature can be added manually within Outlook
- **Product > Tasks > Reassign** – a user can now reassign work to another user within the firm where their User permission is restricted to View Own Work