

Updating Client Addresses

Where a client has moved into a new property as part of the advice process e.g. house purchase or house move, it will be necessary to update the client's address in the **Client > Contact > Main Details** screen and also to update the previous address history in the **Fact Find > Client Cont.** tab.

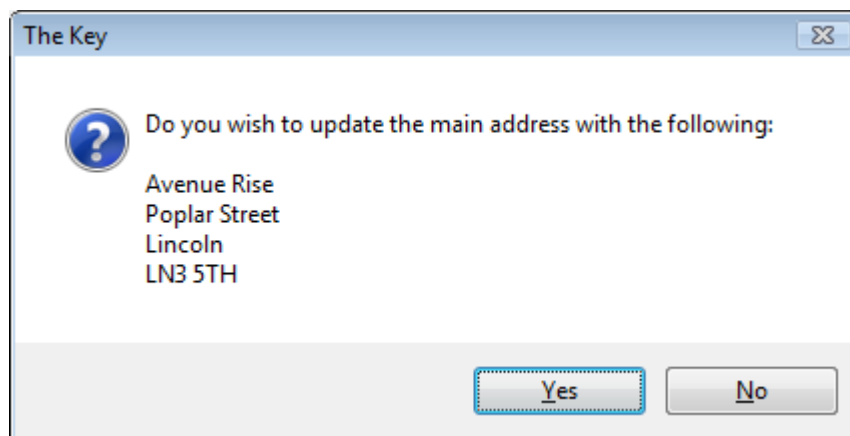
This will ensure the Fact Find information is up to date for any future advice process and also to ensure that any mailing produced through the Key is addressed to the correct property address.

NB: Before following these procedures and updating the client's address it is important that a check is undertaken to ensure that the advice process has been fully completed and that a fully completed and compliant fact find is retained in the **Client > Documents** area.

The updating of the client address can be undertaken in 2 ways, either automatically when entering a Completion date or manually via the Product screen.

Automatic updating of Address through entering of Completion Date

When a Mortgage Product status is updated to **Completed** and a **Completion Date** is entered in the **Application** tab the following prompt will be displayed.



This will occur where the Mortgage Fact Find has stipulated the client as a **First Time Buyer** or **House Move**.

Click **Yes** and the client's new property address from the product screen will be updated into the **Client > Contact > Main Details** screen. The client's old address will also be moved into the **Previous Address** field within the **Fact Find > Client Cont.** screen.

Manual updating of Address through product screen

Where the above process has not been followed the client's address can be manually updated using the **Update Client Address with this Address** function in the **Property** tab of the **Product** area.

NB this process must be completed before a product is Closed through the Worklist tab.

Locate the relevant product in the **Client > Products** area and click on the **Property** tab. This will display the new property address.

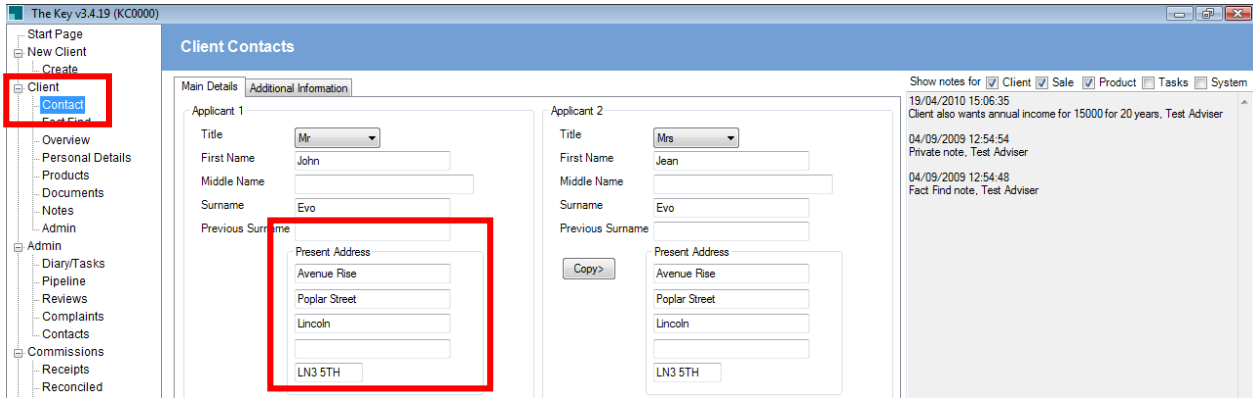
Click on the **Update client address with this address** option

Where a **Completion Date** has not been entered in the **Application** tab a message box will be displayed

Click **OK** which will return you to the **Application** tab where a **Completion Date** can be entered. Click on the **Property** tab to return to the previous screen.

Once a **Completion Date** has been entered and the **Update client address with this address** option has been reselected a further message will be displayed to confirm the process. Click **Yes**.

The new property details will now be displayed in the **Client > Contact > Main Details** tab as shown below



The **Fact Find > Client Cont.** screen will also have been updated to show the previous address details.

The **Date moved into your current address** field should be manually updated to reflect the actual date of moving.

