

Working with Documents



A list of all documents stored against the client's name showing the date created, type of document, details and date of last modification

The Key v3.7.15 (KC0000)

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All Documents relating to this client

Created Date	File Type	Description	Last Modified Date	Final Version
02/11/2011 09:54	Email		02/11/2011 09:55	<input type="checkbox"/>
01/11/2011 12:12	Fact Find Data	Fact Find Snapshot eNBS submitted	01/11/2011 12:12	<input type="checkbox"/>
31/10/2011 12:39	Word file	Suitability Letter ProtectionGI	31/10/2011 12:41	<input checked="" type="checkbox"/>
27/10/2011 12:54	Fact Find Data	Fact Find Snapshot Application	27/10/2011 12:54	<input type="checkbox"/>
27/10/2011 12:54	Fact Find Data	Fact Find Snapshot eNBS submitted	27/10/2011 12:54	<input type="checkbox"/>
27/10/2011 12:52	Word file	Suitability Letter Mortgage	27/10/2011 12:54	<input checked="" type="checkbox"/>
27/10/2011 12:50	PDF file	Product List Skipton Building Society 2 Year Tracker BBR plus 1.48% LTV 60% Purchase	27/10/2011 12:52	<input checked="" type="checkbox"/>
27/10/2011 12:50	PDF file	KFI Skipton Building Society 2 Year Tracker BBR plus 1.48% LTV 60% Purchase	27/10/2011 12:52	<input checked="" type="checkbox"/>
27/10/2011 12:46	PDF file	IDD Template Mortgage_IDD	27/10/2011 12:52	<input checked="" type="checkbox"/>
27/10/2011 12:45	Word file	Fact Find Mortgage	27/10/2011 12:52	<input checked="" type="checkbox"/>
27/10/2011 12:41	Word file	Data Protection Statement	27/10/2011 12:52	<input checked="" type="checkbox"/>

Buttons: Delete, Email, Scan, Open / Edit, Open Read Only, Add

Generate Document
 Template: Verification of Client ID App1 [Create]

Final Version – The final version of a document can be highlighted to allow easy identification when accessing and reviewing cases in the future

E-mail – Documents can be e-mailed to the client using the e-mail address held in the system

Scan – Paper versions of documents can be scanned into the system and converted into electronic files

Add – Documents can be added to the client file that are currently saved in other folders on the user's computer or server

Open Read Only – Allows documents to be viewed as read only files and to navigate to other areas of the Key

Delete – Documents can be deleted if no longer required

This screen is accessed from the **Documents** section of the browser. It stores documents produced during the advice process and allows storing of additional documents as required

Create - Allows a new document to be created based on templates held within the system

Open/Edit – Allows documents to be viewed and edited