

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 v3.0.20 (KT0004)

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All Documents relating to this client

Created	File Type	Description	Last Modified
17/06/2009	Fact Find Data	Fact Find Snapshot Mortgage Sourcing	17/06/2009 16:12
22/12/2008	Word file	Fact Find Mortgage - Final Version	22/12/2008 11:33
22/12/2008	Word file	Fact Find Buy to Let	22/12/2008 11:33
22/12/2008	Word file	Interest Only Questionnaire	22/12/2008 11:33
22/12/2008	Word file	Credit Issues Questionnaire	22/12/2008 11:33
22/12/2008	Fact Find Data	Fact Find Snapshot	22/12/2008 11:00
22/12/2008	PDF file	Sourcing Filters	22/12/2008 11:00
22/12/2008	PDF file	KFI Woolwich, Lifetime Tracker	22/12/2008 11:00
22/12/2008	PDF file	Payment Schedule	22/12/2008 11:00
22/12/2008	HTM file	MBL Source Results	22/12/2008 11:00
22/12/2008	Fact Find Data	Fact Find Snapshot	22/12/2008 11:00
22/12/2008	PDF file	Sourcing Filters	22/12/2008 11:00
22/12/2008	PDF file	KFI Leeds B Society, Fixed til 30-11-10	22/12/2008 11:00
22/12/2008	PDF file	Payment Schedule	22/12/2008 11:00
22/12/2008	HTM file	MBL Source Results	22/12/2008 11:00
22/12/2008	Word file	Data Protection Statement	22/12/2008 11:00

Buttons: Delete, Email, Scan, Open, Add

Generate Document
 Template: Verification of Client Identity App1
 Create

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

Delete – Documents can be deleted if no longer required

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

Open – Allows documents to be viewed

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