

Working with the Pipeline List

The Key v3.0.20 (KT0004)

Administration - Pipeline Business

Products

Filter by

Advisor: G West | Show only products with application date: | Firm name: MW Mortgage Brokers | Custom Status: All | Type: All | Status:

Holder	Provider	Type	Status	Advisor	Date Created	Application Date	Custom Status	Last Updated
Jones, Peter	Alliance & Leic	Mortgage	Completed	G West	29/06/2009			30/06/2009 16:54
Jones, Peter	Accord	Mortgage	Submitted	G West	01/07/2009	01/07/2009		03/07/2009 12:07

All incomplete new business

Product Summary: Status Submitted, Loan Amount £200,000, Type Remortgage, Rate Fixed, Property The View High Street Stratton

Notes: Standard Mortgage, Application Submitted, Completed 01/07/2009, Sent to Lender, Completed 01/07/2009, Offered, task due 08/07/2009 10:21:00, Exchanged, Completed, task due 01/07/2009 10:26:00, Issue Customer Care Letter, Compliance check all documentation

Payment Schedules: Description, Amount Due, Date, Proc Fee, £420.00, 03/0

Buttons: Reassign, Print List, Open Client, Open Item

Click on any of the column headings to sort the data into ascending or descending order

Highlight the client to provide a summary of the Product at the bottom of the screen.

Print List – opens the Pipeline list in Excel to enable further analysis of data to be undertaken

Open Client – this button will open the Fact Find for the client

Open Item – this button opens the product in order to view full details and avoids navigating through the Client area

Payment Schedules – Provides a summary of Commission entered for the Product. Commission details can be edited or added from here

Reassign – Allows Clients, Products and Tasks to be reassigned to other users (subject to users permissions)

Notes – Any Notes entered in the Product area can be viewed from here

Product Summary – Basic details of the product are detailed here

Worklist – Provides a shortcut to the Worklist held in the Product area. The Worklist can be updated by clicking on any of the items listed