

Working with the Pipeline List

Filters – The Type, Introducer and Status filters can be used to narrow down the products listed

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.

Product Summary – Basic details of the product are detailed here

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

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

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

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

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

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

Holder	Provider	Type	Corporate ref.	Submission Status	Status	Advisor	Date Created	Application Date	Last Updated	Recommender Date
Boatman, Jamie	AEGON Scottish Equitable	Insurance		Ready to Submit	Proposed	G Blackburn	18/05/2011		18/05/2011	
Six, Three	Scottish Provident	Insurance		Ready to Submit	Proposed	G Blackburn	11/05/2011		11/05/2011	
Bond, John	Zurich Assurance Limited	Insurance		Ready to Submit	Proposed	G Blackburn	11/05/2011		11/05/2011	
Bond, John	Harpenden Building Society	Mortgage		Ready to Submit	Proposed				11/05/2011	
Bond, John	The Mortgage			Ready to Submit	Proposed				11/05/2011	
Johnson, Adam & Joh...				Ready to Submit	Proposed				10/05/2011	
				Ready to Submit	Proposed				09/05/2011	
				Ready to Submit	Proposed				04/05/2011	
				Ready to Submit	Proposed				04/05/2011	
				Ready to Submit	Enquiry				04/05/2011	
				Ready to Submit	Enquiry				04/05/2011	