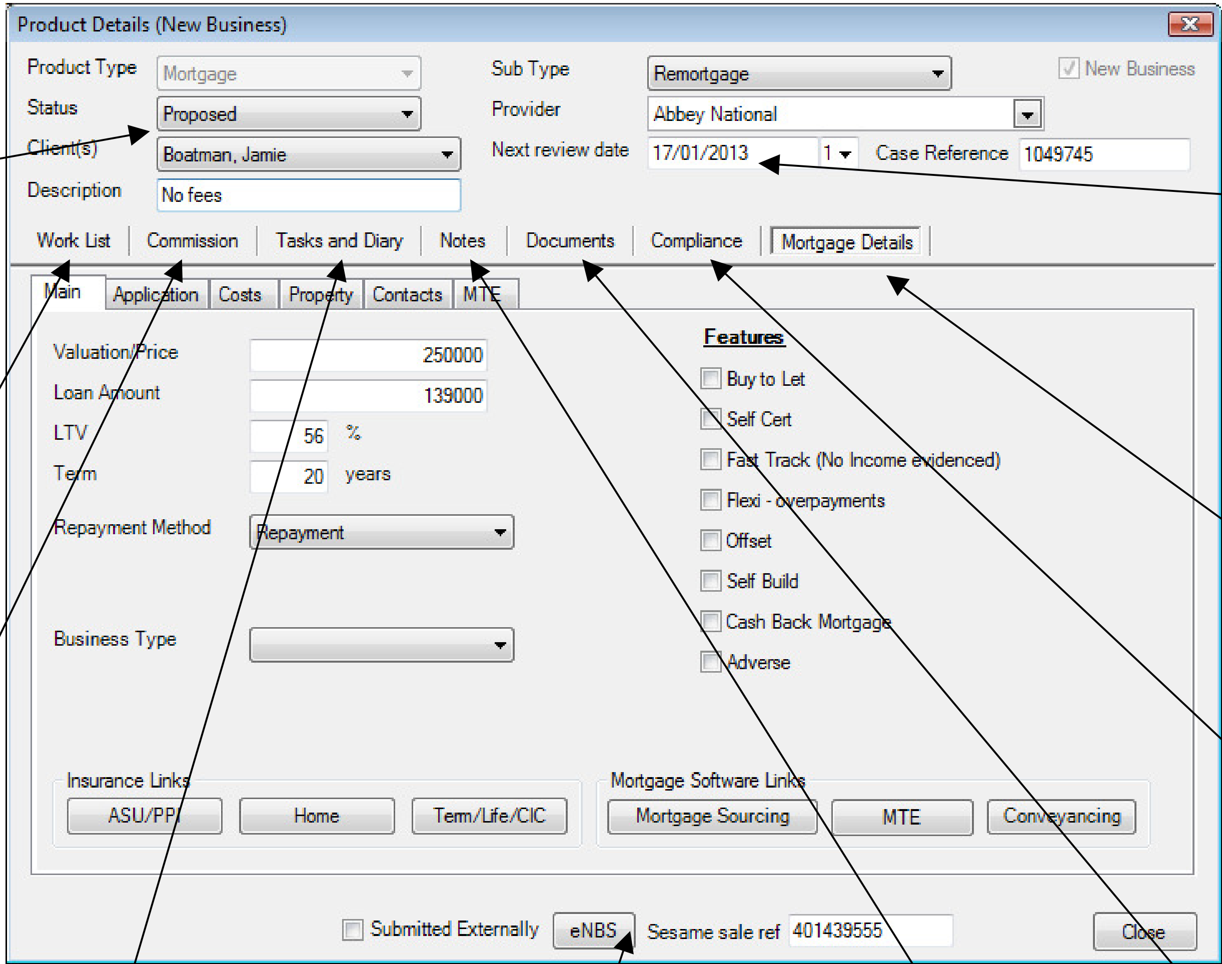
Working with
The Product Area (All areas)



Status – can be manually updated or can be automatically updated through completion of the Worklist

Worklist – allows each stage of the mortgage or insurance application to be recorded, diary dates set and tasks to be re-assigned

Commission – amounts due are populated through mortgage sourcing integrations or can be manually input. Commissions due can be diarised and amounts paid can be allocated.

Tasks and Diary – Any tasks due and diary dates set in the Worklist will appear here. New task and diary items can also be added.

eNBS – notification can be sent to Sesame when new business has been submitted avoiding the need to send details via the Sesame website (see separate eNBS user guide)

Notes – Any Notes relevant to this product can be added here

Review Date – a date can be entered and a report produced showing future review dates entered in order to follow up clients at the end of a relevant period

Mortgage / Insurance Details – contains details of the mortgage or insurance proposal populated from the Fact Find (see separate user guides)

Compliance – information regarding client file reviews due or undertaken by the Supervisor

Documents – any documents produced within The Key e.g. quotes, KFIs, applications etc. will be retained within this tab. Documents produced outside The Key can be added manually