



System Generated
Reviews
Training Manual

360 Lifecycle automatically generates your future sales opportunities based on key dates entered against each policy record. These opportunities are generated overnight and will appear in the servicing adviser's hotbox for them to action accordingly. The triggers for each policy are as follows;

Mortgages

Mortgage Reviews can be driven by a 'Fixed End Date' or 'Initial Rate Period'. **Note, if you select Initial Rate Period, this review will only be generated once a Completed Date has been inputted.**

If you select 'No End Date', this will generate a review based on the 'Penalties End' field. If neither are populated, a review will generate 2 years after the 'Completed' date on the policy.

Life Policies

Life reviews are generated from the 'Authorised Date', plus the Clawback period minus the 'Advanced Notification Period'.

For example, if the Authorised date is the 25.09.13 and the claw back period is 48 months, then the review will be generated 30 days before 25.09.17, therefore will appear in the advisers hotbox on the 25.08.17

Buildings and Contents

Building and Contents reviews are triggered from the 'End Date', by default the system generates a review based on the 'End Date', less the 'Advanced Notification Period'. If the 'End Date' is not populated, then this will work from the 'Start Date'.

All Other Policies – (Income Protection, Pension, Investment Reviews)

Triggers for Income Protection, Pension and Investment policies work from the 'Start Date', plus the 'Clawback Period', less the 'Advanced Notification Period'.

Income Protection:

Type	<input type="text"/>	
Policy No	<input type="text"/>	Term <input type="text" value="0"/>
Source	<input type="text"/>	
Frequency	<input type="text"/>	
Deferred Period	<input type="text"/>	
Premium	<input type="text" value="£0.00"/>	<input type="checkbox"/> Waiver of Premium
Benefit	<input type="text" value="£0.00"/>	
Estimated	<input type="text"/>	<input type="button" value="Estimate"/>
Start Date	<input type="text"/>	
End Date	<input type="text"/>	
Clawback Period	<input type="text" value="0"/>	Months

Pension:

Initial Investment	<input type="text" value="£0.00"/>
Estimated	<input type="text"/>
Start Date	<input type="text"/>

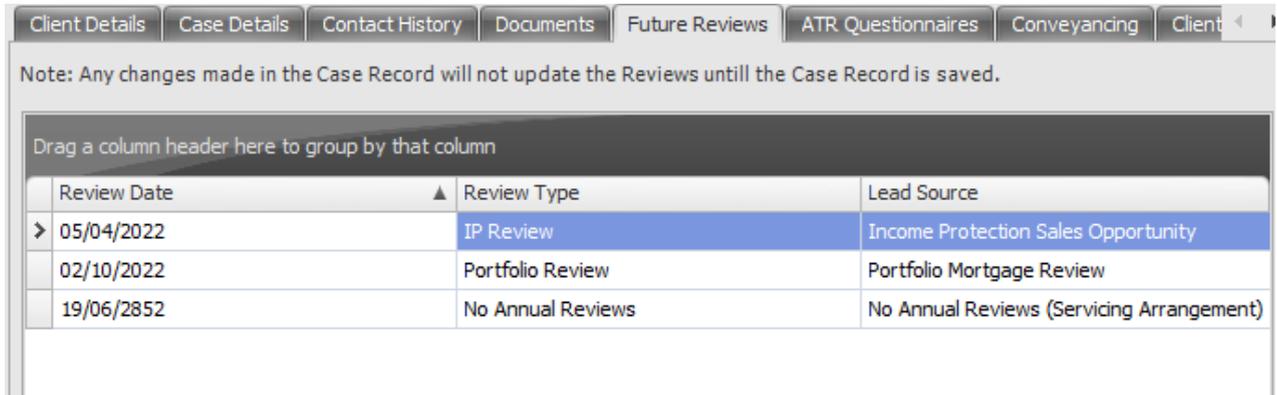
Investment Policies:

Initial Investment	<input type="text" value="£0.00"/>
Interest Rate	<input type="text" value="0.00%"/>
Estimated	<input type="text"/>
Start Date	<input type="text"/>
Maturity Date	<input type="text"/>

Annual Reviews

An Annual Review will be generated 11 months after the last completed bit of business. Therefore, if a life policy is the last completed bit of business on a client case then the annual review will be generated 11 months from the 'Authorised Date' entered on that policy.

There is also a 'Reviews' tab on the 'Case ID' level on a case, if you choose to click on this there is also an option to view all the reviews at once.



Note: Any changes made in the Case Record will not update the Reviews until the Case Record is saved.

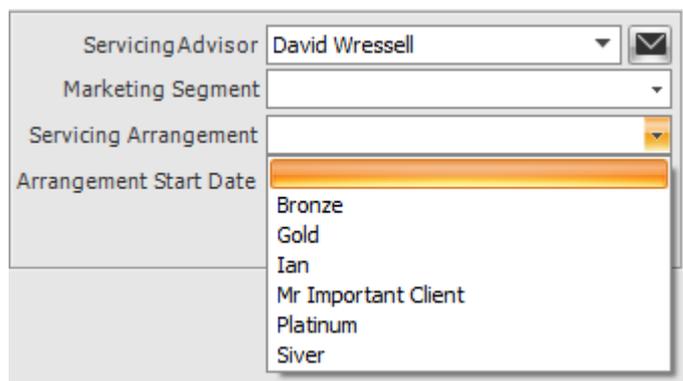
Drag a column header here to group by that column

Review Date	Review Type	Lead Source
05/04/2022	IP Review	Income Protection Sales Opportunity
02/10/2022	Portfolio Review	Portfolio Mortgage Review
19/06/2852	No Annual Reviews	No Annual Reviews (Servicing Arrangement)

Servicing Arrangements

If a servicing arrangement is set for a policy, then this will override any review that the system will generate. This is so you can manipulate the reviews in which will be sent to your hotbox and the level of service that you provide to a client.

The setting and dates for a servicing arrangement can be amended in **Maintenance > General > select Servicing Arrangement settings** in the drop-down menu.



Servicing Advisor: David Wressell

Marketing Segment: [Empty]

Servicing Arrangement: [Empty]

Arrangement Start Date: [Open List]

- Bronze
- Gold
- Ian
- Mr Important Client
- Platinum
- Siver

For more information regarding servicing arrangements, please see our 'Client Segmentation Manual'. This can be provided by our support team.

Here is a reminder of the dates in which will prompt your system to generate a review:

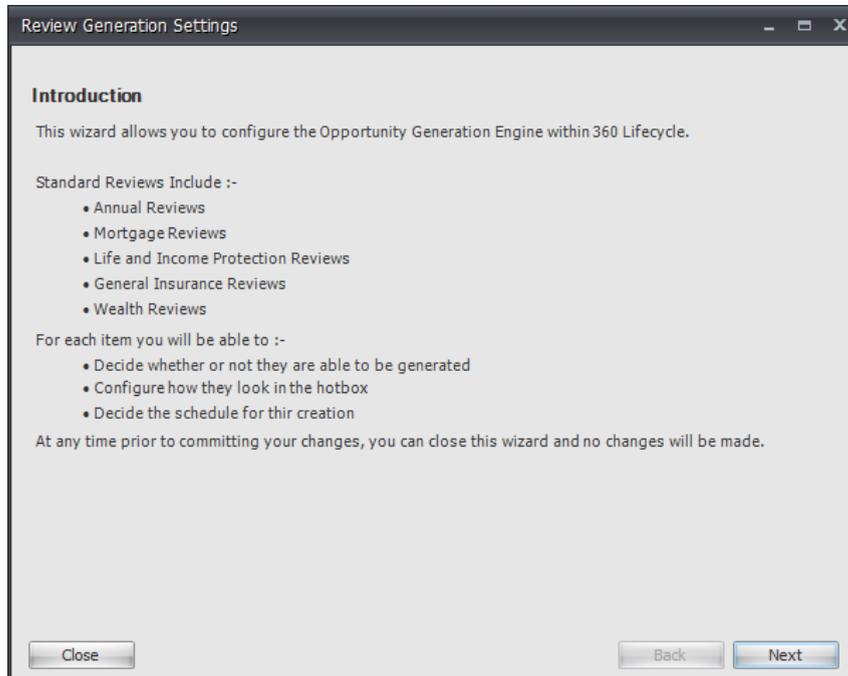
	Mortgage Review	Life Policy Review	B&C Review	Income Protection Review	Investments Review	Pension Review
Start Date				✓	✓	✓
Penalty End Date	✓					
End Date	✓		✓			
Authorised Date		✓				

Annual Reviews worked based on the last completed bit of business, here is a reminder of how these will be generated:

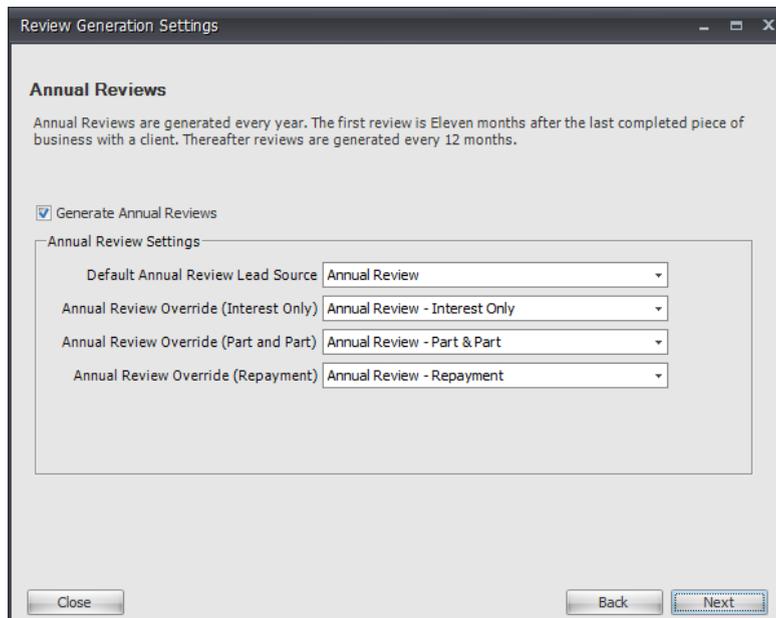
Last completed bit of business	Annual Review
Mortgage	If a mortgage is the last completed bit of business then, the annual review will be generated based on the <u>completed date</u> of the mortgage.
Life Policy	If a Life Policy is the last completed bit of business then the annual review will be based on the <u>Authorised date</u> .
Building's and contents	Where a buildings and contents policy is the last completed bit of business the annual review will be generated from the <u>End Date</u> .
Income Protection	Where an Income Protection policy is the last completed bit of business the annual review will be generated from the <u>Start Date</u> .
Investments	Where an Investments policy is the last completed bit of business the annual review will be generated from the <u>Start Date</u> .
Pension	Where a Pension is the last completed bit of business the annual review will be generated from the <u>Start Date</u> .

Review Generation Settings

You can now manage your own review generation settings within 360 Office. Login, and locate Maintenance > General > Common Settings > Review Generation Settings. This will open a window like the below;



From here, you can quickly and easily maintain your reviews, determining the Advance Notification Period, and the Lead Source linked to these. This can be done for Annual Reviews, Mortgage Reviews, B&C Reviews, Life & Income Protection Reviews and Wealth Reviews.



If you make any changes, these will take immediate effect, meaning if you were to change your Mortgage Review period from 3 to 6 months, leads will immediately show in the relevant adviser's hotbox as per the clients they manage. If you were to reverse this, however – i.e. change from 6 back to 3 months – then any leads that have already generated will be removed from the Case Record.