



Online FactFind Training Manual



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1.0 INTRODUCTION

360 Lifecycle's Online FactFind provides you with the ability to carry out a full sales process through capturing key FactFind data, fully integrated sourcing, quote / apply, recommendation report building and overall document creation and management.

360 Lifecycle Online FactFind offers you the option to 'Invite Client' so your clients can complete, or part complete FactFind at any stage and potentially in advance of any appointment. 360 Online FactFind can be accessed from any web enabled device, thus allowing you to be in control and having access to the case information anytime and anywhere. The guide focuses specifically on the key navigation points of the sales process and allowing you to 'Submit Business' back into 360 Lifecycle.

2.0 GETTING STARTED

Online FactFind can be launched or accessed in one of three ways;



1. From selecting '**Start Advice Process**' against the sales opportunity within your Hotbox



Tote Opportunity Management Tote Windows Seve Evel Pref Pre	Add Referent Lack dotter Verder Verder	8
Capacity of a 12 algorithm Capacity of a 12 algority of a 12 algorithm Capacity of a 12 algorithm	Image: Section Contents Only View Buildings And Contents: Only View Buildings And Contents: Only View Morgage Anice Morgage Anice Morgage Anice Morgage Anice	

2. From accessing the sales opportunity within the 360 case record

Username			
Osemane			
Password			
	Log in		

3. By entering the Online FactFind URL directly into your Internet Browser e.g. <u>https://factfind.360lifecycle.co.uk/</u> and entering your 360 username and password.

3.0 TO BEGIN

3.1 Online FactFind Navigation

If you launch the FactFind from the 360 Lifecycle sales opportunity, then this will automatically take you into the FactFind in relation to that 360 case record. If you access FactFind from your Internet Browser then after successfully logging on you will navigate to a screen similar to the below, showing you your 'In Progress' FactFinds. From here you have a number of options, either in relation to a FactFind which you have already launched or by using the Menu Options at the top of the screen.



n Prog	ress FactFi	nds np	Completed 2			Cont	tact Log (off •
My Fact Finds	Additional Fact Finds							
The following Fa	act Finds are currently in	progress.						
Show 25 •	entries					Search:		
Case ID 👻	Full Names 🔶	Case Advisor¢	Fact Find Created 🗢 🗢	Fact Find Status 💠		Actions		÷
2960960	Client Portal	David Wressell	21/08/2018 12:40 PM	With Client	Edi	t (take back from client	t)	
2963600	Eamonn Demo	David Wressell	23/08/2018 02:00 PM	With Advisor	Edit Fact Find	Invite Client	Refer	×
2974219	David Wressell	David Wressell	21/11/2018 11:02 AM	With Advisor	Edit Fact Find	Invite Client	Refer	×
3042694	Quang Demo	David Wressell	26/10/2018 03:47 PM	With Advisor	Edit Fact Find	Invite Client	Refer	×
3064478	Lisa Demo	David Wressell	15/11/2018 11:15 AM	With Advisor	Edit Fact Find	Invite Client	Refer	×
3068713	Selina Demo	David Wressell	20/11/2018 02:45 PM	With Advisor	Edit Fact Find	Invite Client	Refer	×

3.2 FactFind Menu Options



These Menu Options are always available throughout 360 FactFind and can be accessed at any point.

- Quick Quote This will allow you carry out integrated sourcing by entering some basic requirements. Please note a KFI / Illustration cannot be produced through Quick Quote.
- Product Search This allows you to search all available products across specified types & requirements.
- Opportunities Display is active 360 Lifecycle sale opportunities for which a FactFind has yet to be launched. You can also create a New Opportunity or Case if one is not already present in 360 Lifecycle.
- In Progress Lists 'In Progress' FactFinds from which you can Edit, Invite Client, Refer or Delete / Cancel. You will also see 'Additional FactFinds' under this tab, which will allow you to view PDF copies of existing FactFinds that you are in some way associated to other than being the adviser.
- Completed Groups 'Completed' FactFinds of which have Outstanding and Completed Recommendation Reports.
- Quick Quote & Product Search Enter sourcing requirements with sourcing results then listed underneath.



Nortgage Life Income Protection			
Quick Mortgage Quot	te		
Mortgage Requirements			
Mortgage Details			
Mortgage Reason	Purchase		
Mortgage Type	Standard (inc. Shared Equity / Help To Buy) × -	
Property Value	£200,000		
Loan Required	£100,000		
LTV	50.00%		
Term	25		
Term Type	Years	x •	
Repayment Method	Repayment	x •	
Source Of Deposit	Savings	x •	
True Cost Calculation			

3.2.1 Opportunities

The Opportunities landing screen will display active sale opportunities for which a FactFind has yet to be launched from. As 360 FactFind can only be launched against a current sale opportunity and case record, from here you can also create **a 'New Opportunity'** for an existing client / case or you can create a whole **'New Case'** / client record if one is not already present in 360 Lifecycle to then **'Create FactFind'** against.

Quick Quote	Product Search	Opportunities	In Progress	Completed 2			Contact	Log off	
Select an oppo	cunities ortunity from the list I reate a New Opport			t Find. e a whole New Case.		Sea	David W	pportunities ressell	s for:
Case ID	← Full Name	s 💠 🛛	Advisor 🗢	Opportunity Created 🔶	Opportunity Status	÷	Actions		¢
1007526	David Wres	sell Davi	d Wressell	27/09/2018 02:33 PM	New Opportunity	s	tart Advice Proc	ess -	
Showing 1 to	l of 1 entries						Buildings And C Mortgage Advic Mortgage Only		ily

3.2.2 In Progress

This is the landing screen if you log into FactFind directly from your Internet Browser. 'In Progress' lists all FactFinds which have been created and have yet to be Completed or Cancelled. From here you can either **'Edit FactFind'** to enter the



sales process for that particular case, **'Invite Client'** for the client to complete or part complete FactFind, **Refer** to a colleague or **Delete** / Cancel the FactFind. Please note deleting the FactFind will remove this from the 'In Progress' list and will not result in any updates being made against the 360 Lifecycle case record.

In Prog	ress FactFi	nds 📊	Completed 2			Co	ntact Log c	off 👻	
My Fact Finds	Additional Fact Finds								
The following Fa	The following Fact Finds are currently in progress.								
Show 25 •	entries					Search:			
Case ID 👻	Full Names 🔶	Case Advisor¢	Fact Find Created 🗢	Edit Fa	ctFind, Inv	ite		¢	
2960960	Client Portal	David Wressell	21/08/2018 12:40 PM	Client, I	Refer or De	elete)		
2963600	Eamonn Demo	David Wressell	23/08/2018 02:00 PM	With Advisor	Edit Fact Find	Invite Client	Refer	×	
2974219	David Wressell	David Wressell	21/11/2018 11:02 AM	With Advisor	Edit Fact Find	Invite Client	Refer	×	
3042694	Quang Demo	David Wressell	26/10/2018 03:47 PM	With Advisor	Edit Fact Find	Invite Client	Refer	×	
3064478	Lisa Demo	David Wressell	15/11/2018 11:15 AM	With Advisor	Edit Fact Find	Invite Client	Refer	×	
3068713	Selina Demo	David Wressell	20/11/2018 02:45 PM	With Advisor	Edit Fact Find	Invite Client	Refer	×	

3.2.3 Completed

This screen groups Completed FactFinds which have yet to have a Suitability Report produced or by where the Suitability Report has also been completed. There are a number of **Actions** available.

			_						-,
Quick Quote	Product Search	Opportunities	In Progress Comple	ted 12				Co	ntact Log off
Outstanding Reports									
The following Fact Finds have outstanding Recommendation Reports. Showing Fact Finds f									
Show 10 • entries Search:									
Case ID ≑	Report Name ≑	Full Names 🗧	Submission Date 👻	Report Status ≑				Actions	
2122148	Palmer	Andy Palmer	20/01/2017 10:38 AM	Overdue	View	Reopen	Split	Produce Report	Mark Complete
2140147	Test	Aaron Test	03/02/2017 12:18 PM	Overdue	View	Reopen	Split	Produce Report	Mark Complete
2144700	Seston	Miles Seston	09/02/2017 03:30 PM	Overdue	View	Reopen	Split	Produce Report	Mark Complete
2150987	Test	LML Test	19/02/2017 05:35 PM	Overdue	View	Reopen	Split	Produce Report	Mark Complete
			ersion of t				· · ·		lark Complet
			ew FactFir		•				lark Complete
			Opportun					•	lark Complete
			•••	ity aga	11130	the s	barric	, case	lark Complete
	5	n then re							lark Complete
rodu	ce Rep	ort – Ope	ens Recor	nmenc	datio	on Re	eport	Builder	lark Complete
ark (Comple	te – To k	be selecte	d if a R	ecoi	mme	ndat	tion	
eport	is not i	reauired	or compl	eted 'C	Offlir	ne'			



3.0 EDITING THE ONLINE FACTFIND

When launching the Online FactFind from within 360 Lifecycle you will automatically be taken into the FactFind for the case and clients in question. Alternatively, you can enter the FactFind through the 'Edit FactFind' option when displaying those **In Progress**.

Throughout the sales process a completeness check will be performed to ensure that all mandatory data is filled in before you can 'Submit Business'. Each time you add and enter information through the FactFind, the completeness check will inform you of any missing mandatory data at the top of the page and via the lefthand menu.

Quick Quote F	Product Search	Opportunities	In Progress	Completed 2 W	Missing mai highlighted	-		k
Missing mandatory data								
tems highlighted on the								~
left-hand menu		Find -					View as printable PDI	
Applicants	. Ad	lvice Process						
o Income		Crea	ation date	13/09/2018 09:24 AM				
A Initial Thoughts		Adv	vised type	Advised Sale	Ŧ			
Address History	/ * !	Disclosur	e method	IDD - Email	Ŧ			
 Properties Existing Mortga 		Ad	lvice type	Distance	Ŧ			G.
Existing Policie						,		
🙈 Savings & Inve		se Information						
↓ Liabilities								
🔍 Credit History	1.1		Case ID	1007526				
S Lifestyle Chang	es 🚦	Ca	se source		Ŧ			
😭 Budget Planner		:	Salutation	David				
Protection	_	Mai	lina name	Mr David Wressell				

The 'Advisor View' of the FactFind is presented in the process menu on the lefthand side of the work screen and you will know where you are by colour coding of the process menu. Please note that you can access different sections of the FactFind via the left-hand menu or via the 'Next' and 'Previous' options without completing the mandatory information on that page.

3.1 Convert FactFind

If you need to change your FactFind version mid sales process, then you can do so by selecting 'Convert FactFind' on the Advice Process tab of the Online FactFind. This will remove or add pages depending on the new version selected.

NOTE; if you convert to a FactFind version that removes pages, this information



will not be retained.

3.2 Sales Process Screen

The opening **Sales Process** screen of the FactFind provides you with an ability to set the Agenda of **Topics for Discussion**, create a **Printable PDF**, Produce and Email to the client your **IDD**, and **Send Invite** for the client to complete or part complete FactFind.

Quick Quote	Product Search	Opportunities	In Progress	Completed 2	Wressell	Client View	View FactFind as a Printable PDF
29742	19 - Wres	sell			•		-
		Please fix	the problems in	the highlighted field	s before atten	npting to submit this I	business. 👻
Data Gati		Convert Fact Find +					View as printable PDF
Applicants	A	dvice Process					
Lependants	5	Cr	eation date	21/11/2018 11:02 A	м		
Address His	story	A	lvised type	Advised Sale			•
Roperties 🕈		Disclos	ure method	IDD - Email			-
🕋 Existing Mo		1	dvice type	Distance			•
🔍 Credit Histo	ry	L	ead source				*
😭 Budget Plan			Lead type				•
Research	li li	nitial Disclosure Do	ocument				
Life Require Life Resu	ults	Produce	e IDD using	Standard Terms	- Amen	ded Terms 👻	
Requirement							

Produce IDD in Standard or Amended Terms and for Regulated or Unregulated business. Once produced you can then, View or Email directly to your client. Please note your default IDD Settings need to be entered should you wish to **Produce IDD**.

3.2.1 Send Invite

360 FactFind provides you with an opportunity to send the FactFind to your client for full or part completion. Clients can also upload documentation as part of this process. You can **Send Invite** from either the FactFind 'Sales Process' or 'In Progress' screens and can do this directly or via the Client Portal.



Advice Process			Send Inv	rite can be used at any
Creation date	18/01/2019 03:00 PM			hin the sales process.
Advised type	Advised Sale +			
Disclosure method	IDD - Email 👻			
Advice type	Distance -		Invite Client	×
Lead source	Website +		Invite Client	
Lead type	Ţ		How would you like to	o send the invitation to complete the Fact Find?
Initial Disclosure Document	/		Client Portal	Send the invitation as a Client Portal action. This will be recorded in
Produce IDD using	Standard Terms			the Client Portal in 360 Office and Advisor.
	to fill in the information themselves. You will be informed	when they have finished submitting their	Direct Invite	Send the client a link, by email (plus an activation code sent to their mobile phone). This will not be recorded in the Client Portal in 360 Office and Advisor.
Send Invite	opportunity to review that information before proceeding.			Cancel

When choosing 'Direct Invite' you will have the opportunity to check and edit any details before sending to the client.

	Product Search	Opportuniti	-	Completed 1		ontact L	og off
nvite (Client						
viting the clie	ent to fill out this Fact F	ind will sen	d them an email link i	to the Client View of the site, and an actival	tion code, sent separately by text message		
- hile the Fact	Find is assigned to the	e client, you	will not be able to ed	dit it yourself, though you can take it back fr	om them at any time.		
hen the clien	t submits the Fact Fin	d, you will b	e able to complete th	ne advice process, using the information the	y have provided as a basis.		
Advisor Deta	ils						
	Advisor's r	name	David Wressell				
	Advisor's e	email	david.wressell@360	lifecycle.co.uk			
	Advisor's SM	MS id	DAVID				
Client Details	3						
	Client to i	invite	Hollie Skeggs		*		
	Client's r	name	Hollie Skeggs				
	Client's e	email	david360lc@outlook	x.com			
	Client's mobile p	hone	0845 6592 360				

Once you have ensured that the details are correct choosing '**Send Invite'** will then email your client with a unique link and an activation code by text message so that they can access the FactFind in Client View through their own Internet Browser and device.

Example of the email and text message which your client will receive.

I'd like to invite you to provide some information about yourself, so I can offer the best possible financial advice, most appropriate to your needs.
To do so, please visit the following, and fill in the requested information.
Get Started

ceguius

Welcome Joe Bloggs,

David Wressell





Once the client invite has been sent you will notice the ability to 'Edit FactFind', 'Invite Client', 'Refer' or Delete / Cancel the sales process has been removed. These options would have been replaced with **'Edit (take back from client)'**. The FactFind Status will also show as 'With Client'.

You can take back control of the FactFind at any stage and any additions or amendments the client has made will not be lost. Once the client has provided as much information as possible and submits the FactFind back, you will then receive an email alert confirming this is the case.

Quick Quote	Opportunities	In Progress	Completed 23					Contact	Log off	•
Invite S	Sent									
			, by email and text mes heir information. or vou	-	e it back from them at any	tim	e.			
Case ID 🗢	Report Name	¢	Full Names	¢	Fact Find Created	¢	Fact Find Status 🔶	Actions		¢
1599681	Factfind\Factfir	nd Johr) Factfind\Susan Factfi	nd	29/05/2015 08:28:34		With Client	Edit (take back from	client)	

You can regain ownership of the FactFind at any time by choosing **Edit (take back from client)** This Action will also be displayed against 'In Progress' FactFinds.

You will receive email confirmation once the FactFind has been submitted back from the client.

Case ID ¢	Full Names 🔶	Case Advisor¢	Fact Find Created 🔺	Fact Find Status 🔶		Actions		¢
1599681	John Factfind\Susan Factfind	DemoUser1	17/08/2016 03:51 PM	With Advisor	Edit Fact Find	Invite Client	Refer	×

Once the client has submitted, you will again have the **'Edit FactFind', 'Invite Client', 'Refer'** and **Delete** / Cancel FactFind options available. Re-entering the FactFind will show any updated information and documentation where this has



been provided.

3.3 FactFind Completion

To be able to 'Submit Business' and update the 360 Lifecycle case record all mandatory FactFind



data will need to be entered. When submitting business, the 360 Lifecycle 'master' case record will be updated with any additions or amendments made in the FactFind e.g. to the client's Personal Details, Existing Policies and Recommendations made.

3.3.1 Advisor View

In 'Advisor View' each module of the sales process is presented in the process menu on the left-hand side of the work screen and you will know where you are by colour coding of the process menu. The sales process is progressed in a logical order although you can access any of the left-hand menu options at any point.

 Sales Process Applicants Dependants Income Address History Properties Existing Mortgages 	Applicants Johnny Factfind Personal Details Title Forename	i Mr i John	• •	Open or collapse a row from here
	Protection Needs & Shortfalls			
Advice Process				
Applicants	David Wressell			^
Lependants	Lump Sum			
Thoughts		Death	Critical Illness	
a Income	Total hamaning when this	Death	Critical inness	
Address History	Total borrowing when this transaction completes			
Existing Mortgages	(including main mortgage)			
Existing Policies	Existing protection			
Savings & Investments	Shortfall			
Liabilities		•		
Credit History	Regular Income			
S Lifestyle Changes		On main an Illing and		
Sudget Planner		Ongoing Illness	Greyed out	fields are 'Read
Protection	New mortgage		Only' and	are populated
A Mortgage Scope	Fixed expenditure		from other fi	
Scope of Discussion	Discretionary and other		nomounern	eius
∎∎ Needs & Priorities	expenditure			
f Bank Details	Existing protection			

3.3.2 Client View

You can switch to Client View at any time during the sales process by selecting the **'Client View'** option. Switching to Client View will invoke the same user interface as your clients will experience if you were to Invite Client.



Quick Quote Opportuniti									
Applicants	Sales process You can switch to Client View								
à Income	_{cre} at any stage within the								
Address History	Adv FactFind								
A Properties	Disclosure Method IDD - Face to Face *								
Existing Mortgages Existing Policies	Sale Type Face to Face 🔹								
🔥 Assets	Required Client Documents * Bank Statements								
↓ Liabilities	Discussion Details								
🔍 Credit History (🍤 Lifestyle Changes	Select the topics you wish to discuss with the client. This will change which questions will need answering.								
😭 Budget Planner	Topics for discussion								
A Mortgage Requirements	Mortgage Protection B&C								
Mortgage Results	Initial Disclosure Document								
Life Requirements	Produce IDD using Standard Terms Amended Terms								
Requirements	Invite Client								
Income Results	If you wish, you can invite the client to fill in the information themselves. You will be informed when they have finished submitting their information, and you will have the opportunity to review that information before proceeding.								

Client View will offer the same FactFind data capture requirements as Advisor View although rather than having a left-hand process menu you can navigate through the FactFind stages via the ribbon at the top of the screen. You can switch back to Advisor View at any time by choosing **'Advisor View'**.

Qui Yo	ou can swit	ch back t	:0	Factfind\Factfind			Contact	: Log off	•
We A	dvisor Viev	v at any p	point.	Additional Income	Unemployment	Properties	Mortgages	Protection	>
				-	Step 2 of 13		+-		
	Applicant de	etails for Jol	nnny Factf	ind -		•			
		Ũ		gh the Ribbon	or	0			>
		•••		rname: actfind					•
	What is yo		Previo	ous Name:	How do	you like to be	addressed?		
	Mr	•				Johnny	temove applicar	nt	

Please note that you cannot carry out Sourcing or Submit Business in Client View

3.4 FactFind Requirements & Sourcing

360 Online FactFind provides the ability to capture Mortgage, Life, Income Protection and B&C Requirements with fully integrated sourcing. Please note that the items which has been selected as Topics for Discussion (see Sales Process



section) will determine what requirements can be captured and sourcing to be carried out against.

You can capture multiple requirements per need area to then carry out sourcing from and select recommendations for. The following screen shots will go through the steps of capturing requirements and displaying results for Mortgages and Life although it is the same process across all need areas.

3.5 Capturing Requirements

To capture requirements within any need area you first of all need to select **'Add Requirement'**. This will then create a set of data capture fields for which you will need to enter information. There are various menu selection items that will then drive an additional subset of data capture fields (this is the same throughout the full sales process).

Please use your Internet Browser scroll bar to ensure all information within the Requirements screen has been captured before choosing **'Get Quotes'**.

If any mandatory information is missing the mandatory data field(s) will be displayed in red and you will be notified of missing data from the left hand process menu.

Please fix the problems i	in the highlighted fields before attempting to submit this business.
Sales Process Mortgage Requirements	
Applicants Property Purchase Standard	Repayment - £270,000.00
Dependants Applicant Details	^
Address History Applicants	🛛 🗐 🖉 🖉 🖉 🖉
Properties First Applicant Type	No Selection
Existing Mortgages Second Applicant Type	No Selection
Existing Policies Mortgage Details	·
L labilities	
Credit History Mortgage Reason	
Lifestyle Changes Mortgage Type	Standard *
Budget Planner Repayment Method	* Repayment
Mortgage Source Of Deposit	Savings v
Requirements Property Value	£300,000.00
Mortgage Results	£270,000.00
Life Results	90.00%
Income Protection	The Term field is required.
Requirements	

hand menu



Please note 360 Online FactFind also features integration with iPipeline's **Solution Builder** to source multi-benefit products from the Life Requirements screen. Products that are 'Flagged' / 'Saved for Later' or applied for within Solution Builder can be retrieved back into FactFind Submission Sheet and will include all appropriate data and documents.

Sales Process				Launch Solution Buil	der	•
L Applicants	Life Requirements					
Le Dependants	Term Only with Life Only for Man Te	est & Lady Test			^	
ã Income ▲ Address History	Product Type	Term Only	-	Ability to lau	unch into	Solution
roperties	Lives Assured	× Man Test × Lady Test	Ŧ		Life Degui	iromonto
★ Existing Mortgages ★ Existing Policies	Lives Assured Basis	First Life	-	Builder from		
🚓 Assets	Renewable Contracts	O Yes No		screen. Pro	Juucis li	nat are
↓ Liabilities	Term Basis	Years	- 4	Flagged' / 'S	Saved for	Later' or
🗨 Credit History	Term (Years)	20		00		
S Lifestyle Changes	Quotation Basis	Sum Assured	, C	applied for	within	Solution
🗰 Budget Planner	Cover Basis	Life Only	-	Builder can	be retriev	ed back
Research	Benefit Amount	£200.000.00				
Mortgage Requirements				nto Submiss	sion Sheet	
Mortgage Results	Increase Rate	Level	-			
Secured Loan Requirements	Premium Frequency	Monthly	-	Choose Get	Ouotes	to carrv
Secured Loan	Premium Type	All	-		-	5
Results	Terminal Illness Cover	Yes No		out fully inte	grated As	sureweb
	Include Waiver of Premium	○ Yes		sourcing	from	Life
Life Results	Remove			0		
Income Protection Requirements				Requiremen	its screen	
Income Protection				· ·	_	
Results	Add requirement			Get Quotes		
B&C Requirements						
B&C Results	You can a	dd multiple requ	uireme	ents Previous N	ext	-
	per need a	area to source ac	ainst			

in a O Desalte

3.6 Sourcing & Results

Upon choosing **'Get Quotes'** you will then move forward to the Results. Where multiple requirements are present for a need area then quotations will be displayed for each requirement.

With the integrated sourcing results displayed you will have a number of options, including, **'Show Details'**, **'Request Illustration'** and **'Shortlist'**.



Sales Process	Mort	haana	e auot	tation results for	each requirer	nent are chr	wn halow. Adv	1 nuntee to ebr	ortliet to v	iew on sub	mission (haat						
L Applicants	mon	gugu	o quo.		cacinicidanci	none are one		, quoto to on	510102.00 1	1011 011 001								
🚨 Dependants	Prop	ertr	Pure	hase Standard	Renavment -	£270 000 0	in							•				
a Income	Filters	- 1		nase standard	repayment		·							~				
🛓 Address History	T INCOLO	5																
🏟 Properties	Show	w 🗄	25	 entries 							Searc	h:						
👚 Existing Mortgages						Initial 🔒	Initial 🔒	Standard .		Max								
Existing Policies				Lender	Scheme	Rate	Period [–]	Rate	APR [®]	LTV 🔻	ERC	MMP [*]	Fees			c. /		
🕼 Assets	۲			Family BS	Stepped	1.39%	6 months	4.79%	4.40%	90.00%	5 years	£1,289.26	£1,055.00		Le	eft 'cli	ck' aga	ains
Liabilities	•		۳	Family BS	Stepped	1.39%	6 months	4.79%	4.40%	90.00%	5 years	£1,289.26	£1,254.00				•	
🔍 Credit History	•	*		Saffron BS	Stepped	2.39%	1 year	5.39%	4.70%	90.00%	4 years	£1,415.29	£1,650.00		qu	Jotati	on to	Sho
S Lifestyle Changes	•	*	1	Saffron BS	Stepped	2.39%	1 year	5.39%	4.70%	90.00%	4 years	£			_		_	-
📽 Budget Planner	•	*	1	Saffron BS	Stepped	2.39%	1 vear	5.39%	4.70%	90.00%	4 vears		Details est KFI		- D	etails	, Requ	iest
A Mortgage		*		Saffron BS	Stepped	2.39%	1 year	5.39%	4.70%	90.00%	4 vears	 Short 				-		
Requirements		^										1			- 111	ustra	tion a	na
Mortgage Results	۲			Leeds BS	Stepped	2.55%	2 years	5.69%	5.10%	90.00%		£1,436.27			~	•		
🛃 Life Requirements	۲	×		Nottingham BS	Discount	2.99%	2 years	5.74%	5.60%	90.00%	None	£1,510.96	£669.00		SI	nortli	st	
Life Results	٠			Leeds BS	Stepped	2.99%	2 years	5.69%	5.10%	90.00%	2 years	£1,494.67	£734.00					
S Income Protection				Nationwide BS	Fixed	3.24%	2 years	3.99%	4.00%	90.00%	2 years	£1,530.07	£1,354.00					
Requirements	•	×	۲	Saffron BS	Discount	3.29%	3 years	5.39%	5.20%	90.00%	None	£1,535.43	£1,050.00					
				Family BS	Fixed	3.29%	Jun-2018	4.79%	4.50%	95.00%	3 years	£1,536.92	£1,055.00					
Requirements			-															

From within each of the Results pages you can also sort the quotations by any of the column headers, **'Search'** for a particular product or provider and where applicable display why certain **'Providers are Not Quoting'.**

Factfind\Fact	find									
 Sales Process Applicants Dependants Income 		results for each requir h Life Only for John		own below. Ad	d quotes to sł	nortlist to vie	Se			particular rovider
Address History Properties Existing Mortgages	Results Show 25	Providers Not Quotin	g 1 9					Search:		
🛃 Existing Policies 🔊	Provider 🎈	Product	Sum Assured [♦]	Premium	Renewal	Waiver To Age	Premium Type	Commission	+ Expires	\$
↓ Liabilities	AIG	AIG Low Start Term	£250,000.00	£9.44		70	Guaranteed	£218.59	30/06/2015	
Credit History	Aviva	Aviva Life Insurance Options	£250,000.00	£15.32		70	Guaranteed	£358.19	Sort	quotations b
(S) Lifestyle Changes	Legal & General	Legal & General Level Term Assurance (Electronic)	£250,000.00	£15.35		Expiry	Guaranteed	£319.39		of the colum
A Mortgage Requirements	Legal & General	Legal & General Level Term Assurance (Paper)	£250,000.00	£15.35		Expiry	Guaranteed	£300.55	head	
Mortgage Results Life Requirements Life Results	Legal & General	Legal & General Mortgage Term Assurance (Electronic)	£250,000.00	£15.35		Expiry	Guaranteed	£319.39	30/06/2015	=
Income Protection Requirements Income Results	Legal & General	Legal & General Mortgage Term Assurance (Paper)	£250,000.00	£15.35		Expiry	Guaranteed	£300.55	30/06/2015	=
REC Dequirements	Lenal & General	Legal & General Multi	£250.000.00	£15 35		Expire	Guaranteed	£319 39	30/06/2015	=

3.6.1 Show Details, Request Illustration and Shortlist

Left clicking against any of the quotations displayed on the Results screen will provide you with the following three options;

Show Details

Shortlist

Client Specific Illustration



- Show Details This will provide you with some core information regarding the quotation e.g. the provider, product, suitability and commission information.
- Request Illustration This will allow you to produce an immedate illustration for usage. Any Illustrations produced directly from the Results will automatically be uploaded to the 360 Lifecycle case record document repository.
- Shortlist Choosing 'Shortlist' will copy the quotation details into the Submission Sheet, for where you can potentially select as 'Chosen'. Please note that you can Shortlist multiple quotations per requirement. Any quotations for which you select as shortlisted can visible from Results screen through colour coding. Shortlisting products will then automatically save your sourcing results.

4.0 SUBMISSION SHEET

Any quotations for which you have shortlisted from within the sourcing results will be displayed on the Submission Sheet Quotations page. The Submission Sheet will allow you to select any Quotations as **'Chosen'** and again with the ability to either **'Show Details', 'Request Illustration'** or **'Remove'**. Where present you can also directly **'Apply'** for a product and **'Retrieve Quotes'** carried out via the integration with Solution Builder.

Selecting '**Chosen'** will copy the Quotation details as a recommendation into the relevant product area. Submission Sheet however will also provide you with the option to add manual recommendations.



Quotations will list any of the sourcing Results which you chose

Sales Process	Quotations Mortgages Secured Loans Life Policies Income Protection General Insurance Multi-Benefit Policies
Applicants	
👲 Dependants	Mortgage Shortlist
ð Income	Property Purchase Standard (inc. Shared Equity / Help To Buy) Repayment - £200,000
Address History	Show 10 v entries Search: Change columns
🏫 Properties	
Existing Mortgages	Initial Initial Std Lender Scheme Rate Period Rate APRC MaxLTV ERC MMP Fees Date Date Co
Existing Policies	Nationwide Tracker 1.29% 2 years 3.74% 3.40% 70.00% None £780.29 £1,084.00 17/C00040 (2000040)
🗞 Assets	BS have 1200 2 years 0.140 0.400 hours 10020 1,00400 04. Left 'click' again
↓ Liabilities	showing 1 to 1 of 1 entries
🗨 Credit History	Showing 1 to 1 of 1 entries Quotation to Sh
S Lifestyle Changes	Details, Reques
🏶 Budget Planner	•
A Mortgage	Secured Loan Shortlist Illustration, Sele
Requirements	Life Protection Shortlist Chosen or Rem
Mortgage Results	Term Only with Life Only for
Secured Loan Requirements	Show 10 v entries Search: Change columns
Secured Loan	Walver
Results	A Sum ⊕ ⊕ ⊕ To ⊕ ⊕ ⊕ Quote ⊕ Shortlisted ⊕ roduct Assured Premium Type Age Term Commission Expires Date Date
Life Results	egal &
Income Protection	eneral prtgage £200,000.00 £12.11 Guaranteed 20 £251.97 16/09/2016 17/08/2016 17/08/2016 04:16 PM 04:16 PM Apply

Ability to directly **Apply** for a shortlisted product

4.1 Show Details, Request Illustration, Chosen and Remove

Left clicking against any of the shortlisted Quotations will provide you with the following four options;

Show Details Request Illustration

Remove

- Show Details This will provide you with some core information regarding the quotation e.g. the provider, product, suitability and commission information.
- Request Illustration This will allow you to produce an immedate Illustration for usage. Any Illustrations produced will automatically be uploaded to the 360 Lifecycle case record document repository.
- Chosen Selecting 'Chosen' will copy the Quotation details into the relvant product area of Submission Sheet. For example, selecting 'Chosen' against a shortlisted Mortgage Quotation will copy the details into the Mortgages section of Submission Sheet (see screenshots below). Any Quotations for which you select as 'Chosen' can visible through colour coding. Selecting Chosen will also copy the quotation details as a recommendation into the relevant need / product area.



Factfind	I\Factfind *	
Sales Proce	Chosen Quotations will be	
Applicants	Guotatons Moligages El	
Lependants	visible through colour coding	
à Income	Mortgage Shortlist	
Address His	tory Property Purchase Standard Repayment - £270,000.00	
Properties	Show 10 • entries Search:	
TExisting More	rtagoes	
Existing Poli	initial Initial Std True Cres Lender Scheme Rate Period Rate APR MaxLTV ERC MMP Fees Cost	
🔥 Assets	Nationwide Fixed 3.24% 2 years 3.99% 4.00% 90.00% 2 years £1,530.07 £1,354.00 £95,231.47	
↓ Liabilities	BS Prived 5.24% 2 years 5.55% 4.00% 50.00% 2 years 1.1,550.07 1.1,534.00 1.553,251.47	
🔍 Credit Histo	ry Showing 1 to 1 of 1 entries Previous 1 Next	
Ch Lifestyle Ch	anges	
😭 Budget Plan	Iner Life Protection Shortlist	
A Mortgage	Term Only with Life Only for Johnny Factfind	
Requiremen	ts Show 10 • entries Search:	
Mortgage		
🛃 Life Require	ements Provider Product Assured Premium Type Age Term Commission Expires	
Life Resul	Aving State of Control	
Income Prot Requirement	tection Options	
Income R	Showing 1 to 1 of 1 entries Previous 1 Next	
Factfind\Factf	ind Ind	
Sales Process	Quotations Mortgages Life Policies Income Protection General Insurance	
 Sales Process Applicants Dependants 	Quotations Mortgages Life Policies Income Protection General Insurance	
 Sales Process Applicants Dependants Income 	Quotations Mortgages Life Policies Income Protection General Insurance	
 Sales Process Applicants Dependants Income Address History 	Quotations Mortgages Life Policies Income Protection General Insurance	
 Sales Process Applicants Dependants Income Address History Properties 	Quotations Mortgages Life Policies Income Protection General Insurance	
Sales Process Applicants Dependants income Address History Properties Existing Mortgages	Quotations Mortgages Life Policies Income Protection General Insurance	
 Sales Process Applicants Dependants Income Address History Properties Existing Mortgages Existing Policies 	Quotations Mortgages Life Policies Income Protection General Insurance	
 Sales Process Applicants Dependants Income Address History Properties Existing Mortgages Existing Policies Assets 	Quotations Mortgages Mortgages Properties to be sold Mortgage Pease complete a KH for the shortlinked quote indext to this mortgage. Owner is Johnny Factfind	
 Sales Process Applicants Dependants Income Address History Properties Existing Mortgages Existing Policies Assets Liabilities 	Quotations Mortgages Mortgages Properties to be sold Mortgage Mortgage Verse complete a KTI for the shortlisted gashe linked to this mortgage. Owner Image: Address 1 72 Walcot Road	dat
 Sales Process Applicants Dependants Income Address History Properties Existing Mortgages Existing Policies Assets Liabilities Credit History 	Quotations Mortgages Life Policies Income Protection General Insurance Mortgages	
 Sales Process Applicants Dependants Income Address History Properties Existing Mortgages Existing Policies Assets Liabilities Credit History Ulfestyle Changes 	Quotations Mortgages Mortgages Properties to be sold Mortgage Mortgage Verse complete a KTI for the shortlisted gashe linked to this mortgage. Owner Image: Address 1 72 Walcot Road	dat
 Sales Process Applicants Dependants Income Address History Properties Existing Mortgages Existing Policies Assets Liabilities Credit History Lifestyle Changes Budget Planner 	Quotations Mortgages Life Policies Income Protection General Insurance Mortgages	i
 Sales Process Applicants Dependants Income Address History Properties Existing Mortgages Existing Policies Assets Liabilities Credit History Ulfestyle Changes 	Quotations Mortgages Mortgages Properties to be sold Mortgage Properties to be sold Mortgage Owner # Johnny Factfind Address 1 72 Watcot Road Address 2 Any missing mano policy information requiring completio Postcode SN3	i
 Sales Process Applicants Dependants Income Address History Properties Existing Mortgages Existing Policles Assets Liabilities Credit History Lifestyle Changes Budget Planner Mortgage 	Quotations Mortgages Life Policies Income Protection General Insurance Mortgages	i
 Sales Process Applicants Applicants Dependants Income Address History Properties Existing Mortgages Existing Policies Assets Liabilities Credit History Uifestyie Changes Budget Planner Mortgage Requirements 	Quotations Mortgages Life Policies Income Protection General Insurance Mortgages Properties to be sold	i
 Sales Process Applicants Applicants Dependants Income Address History Properties Existing Mortgages Existing Policies Assets Liabilities Credit History Lifestyle Changes Budget Planner Mortgage Results 	Quotations Mortgages Life Policies Income Protection General Insurance Mortgages	i
 Sales Process Applicants Dependants Income Address History Properties Existing Mortgages Existing Policies Assets Liabilities Credit History Lifestyle Changes Budget Planner Mortgage Results Life Requirements Mortgage Results Life Requirements Life Requirements Life Results Income Protection 	Quotations Mortgages Life Policies Income Protection General Insurance Mortgages Properties to be sold	i
 Sales Process Applicants Dependants Income Address History Properties Existing Mortgages Existing Policies Assets Liabilities Credit History Lifestyle Changes Budget Planner Mortgage Requirements Mortgage Requirements Life Requirements Life Requirements Life Requirements Life Requirements Life Requirements Life Requirements 	Quotations Montgages Life Policies Income Protection General Insurance Montgages	i
 Sales Process Applicants Applicants Cependants Income Address History Properties Existing Mortgages Existing Policies Assets Liabilities Credit History Uifestyle Changes Budget Planner Mortgage Results Life Results Itife Results Income Protection Requirements Income Protection 	Quotations Mortgages Mortgages Properties to be sold Mortgage County Witchine Postcode SN3 County United Kingdom Wortgage Postcode SN3 Lender	i
 Sales Process Applicants Dependants Income Address History Properties Existing Mortgages Existing Policies Assets Liabilities Credit History Lifestyle Changes Budget Planner Mortgage Requirements Mortgage Requirements Life Requirements Life Requirements Life Requirements Life Requirements Life Requirements Life Requirements 	Quotations Mortgages Image: Image: Mortgages Image: Properties to be sold Image: Mortgage Image: Mortgage Image: Owner Image: Address 1 72 Walcot Road Address 2 Image: Town Swindon County Witshire Postcode SN3 County United Kingdom Image: Image: Image:	i

• Remove – Remove from the shortlisted Quotations.

4.2 Retrieving Solution Builder Quotes

Any products that were 'Flagged' / 'Saved for Later' or applied for via the Solution Builder integration can be retrieved back into Submission Sheet by selecting **'Retrieve Quotes'.**



Sales Proce	SS						a	-
Applicants	Quotations Bank D	ietalis Mortgages S	Secured Loans	Multi-Benefit Policies	Life Policies	Income Protection	General Insuran	be
Lependants	Mortgage Shortlist							^
a Income	Property Purchase St	andard (inc. Shared Eq	juity / Help To Bu) Repayment - £100,0	000			*
Address His								
🏫 Properties	Secured Loan Short	llist						<u>^</u>
Texisting Mo	solution Builder Qu	otes						~
🛃 Existing Pol	cies							
🗞 Assets							Retrieve Quotes	
↓ Liabilities	Products Applied For						X	✓ Retrieve Quotes ■
🔍 Credit Histo	ry Solutions Liked							✓
S Lifestyle Ch					hmicc	ion She	at ahi	lity to
😭 Budget Plan	Life Protection Sho	rtlist						5
Research				Retrie	ve Q	uotes	for pro	oducts
Mortgage Requirement	Income Protection s	snortlist		were '	Flago	ed' / 'Sa	ved for	Later'
Mortgage	Results B&C Shortlist							
Secured Lo	an			or ap	plied	for via	the Sc	olution
Requiremer				Builde	r inte	gration		
Secured L Results	.oan			Danae		gracion		
🛃 Life Require	ments							
Life Resu	ts							
Uncome Pro								
Requiremen								
Income P	rotection							-

Once any previous Solution Builder quotes have been retrieved selecting '**Chosen'** will copy the Quotation details as a recommendation into the relevant product area.

Fropenies		
Existing Mortgages	Solution Builder Quotes	
Existing Policies	Retrieve Q	uotes
Assets		uoies
Liabilities	Products Applied For	
Credit History		
Lifestyle Changes	No products have been applied for using Solution Builder.	
Budget Planner		
,	Solutions Liked	
Research		
Mortgage Requirements	Man Test, Lady Test - Multi Provider £43.9	2 🔺
Mortgage Results	Zurich Level Protection Plan £9.36	*
Secured Loan Requirements	Level Term, Term 20 years, Cover type Life & CIC, Benefit amount £210000	
Secured Loan Results	Apply Not Chosen Chosen	
Life Requirements	Cirencester Friendly Income Assured Plus (Pure) £34.56	~
Life Results		
Income Protection Requirements	Income Protection, To age 65, Benefit amount £20000, Deferred period Three Apply Not Chosen Chosen	
Income Protection Results		
B&C Requirements		
B&C Results		
Submission Sheet	Selecting Chosen will also copy the quotation	on
Documents	details as a recommendation into the releva	nt
Submit Business		II IC
	need / product area	
	·	1~"
	Ability to Apply a retrieved Solution Build	ier



4.3 Manually Adding a Recommendation

If you have not completed any integrated sourcing within the FactFind or are applying for a product which you did not 'Shortlist' then you have the ability to manually add a recommendation within Submission Sheet.

To do so first of all navigate to the need / product area that you wish to add the record against, upon where you will find the ability to **'Add'**. You will then need to complete the policy information for the product you are recommending. If any mandatory data is missing you will be notified of this from the process menu and the data items will be shown in red.





Sales Process	Mortgage		^
Applicants	Owner		
Dependants	Address 1		
a Income			
Address History	Address 2		
Properties	Town		
Existing Mortgages	County		
Existing Policies	Postcode		
Assets			
Liabilities	Country	United Kingdom +	
🛰 Credit History		♥ View map	
S Lifestyle Changes	Lender	Search for Lender •	Please select the lender.
Budget Planner	Submission Route	· · · · · · · · · · · · · · · · · · ·	Please select the network.
Mortgage Requirements	Product		
Mortgage Results	Repayment method		Please select the repayment method.
Life Requirements	Mortgage Type		Please select the mortgage type.
Life Results	Scheme		Please select the scheme type.
Income Protection			
Requirements	Interest Rate		Please enter the interest rate.
Income Results	Property Value		Please enter the property value.
B&C Requirements	Monthly Mortgage		Please enter the monthly mortpage payment amount.
Submission Sheet	Payments		amount.
Documents	Repayment Amount		Please enter the repayment amount.
Submit Business	\ \		
		e the required dat	a items of the
	product	you are recomm	ending. Missing

5.0 DOCUMENTS

A copy of all sales process documentation which has been generated via the Online FactFind will be automatically saved against the 360 Lifecycle case record. This includes the produced IDD, Illustration(s), Sourcing & Shortlisted results.

mandatory data will be displayed

Accessing **Documents** from the left hand process menu will allow you to check or repoen any of the existing case documentation which has been previously produced and uploaded or **'Rename', 'Delete'** and **'Download'**. You will also be provided with the ability to add / **'Upload'** any new documents to the case record.



Ability to manually **Search** for documents



5.1 Upload Documents

As well as being able to make changes to existing documentation you can also **'Upload'** new case documents from within the FactFind.



6.0 NOTES

You have the ability to **'Add Note'** against any page of the Online FactFind. Multiple notes can be added against a page and notes can be added or edited at any time until you have chosen to 'Submit Business' or Cancel / Delete the FactFind.

6.1 Add Note

To 'Add Note' against any stage of the FactFind process first of all navigate to the



page for which you would like to record your notes. From the right hand corner select the 'Add Note' icon. These can be added to the side of every page, or against an individual section, such as 'Employment Income'.

These notes will sit on the PDF at the end of the relevant section they are added to.



Sales Process	Documents											
Dependants	🖟 Rename 🔀 Delete	G	Refresh 🔑 Download		Search file name:	02	2/06/2015 by HLPUser1		×			
Income	占 🗀 Case		Name	-	Tag 💌	Creat	ed 💌					
Address History	- Copportunity	6	Life Insurance Requirement Shortlist		Life Policy - Johnny Factfind - LTA	02/0	6/2015 19:44:40		00//			
Properties	Sale		Mortgage Requirement Shortlist		Mortgage - Johnny Factfind & Susan Factfind - 7	01/0	6/2015 14:16:47		02/(
Existing Mortgages			Life Insurance Requirement Shortlist		,	01/0	6/2015 12:16:36					
Existing Policies			Mortgage Requirement Shortlist				6/2015 12:11:56					
Assets			Product Key Features - Key Features of M.		Life Policy - Johnny Factfind - LTA	- ·	5/2015 17:57:00	T				
, Liabilities			Product Key Features - Critical Illness Insu		Life Policy - Johnny Factfind - LTA		5/2015 17:57:00					
Credit History			Product Key Features - Critical Illness Insu		Life Policy - Johnny Factfind - LTA		5/2015 17:56:59					
Lifestyle Changes												
Budget Planner			Product Key Features - Life Insurance Opti		Life Policy - Johnny Factfind - LTA	- ·	5/2015 17:56:59					
		6	Product Key Features - Life Insurance Opti		Life Policy - Johnny Factfind - LTA	31/0	5/2015 17:56:59					
Mortgage Requirements		0	Client Specific Illustration - Life		Life Policy - Johnny Factfind - LTA	31/0	5/2015 17:56:59		I			
Mortgage Results									1			
Life Requirements									1			
Life Results												
Income Protection					Multiple	2	notos	car	h h		adde	Ы
Requirements	Upload Documents											
Income Results	Select folder: Case	0 O	pportunity 🖲 Sale		against	ar	ny sectio	on/p	bage	e of	Onlir	ie
B&C Requirements	Browse				FactFin	Ч	W/horo	not		ro n	rocor	` +
Submission Sheet					Factrin	u.	vvnere	100	22 di	e p	lesei	ιL

6.2 All Notes

Selecting **All Notes** from the left hand process menu will display all notes which have been recorded within the sales process and show which page of the FactFind they are recorded on. From here you can edit or delete a note which is already present.

side of the page.



Factfind\Fact	tfind				
 Sales Process Applicants Dependants 	Notes You can add notes to any page	using the Add Note button. Whi	chever page they are added on,	notes are also shown here.	
The second secon	02/06/2015 Documents by HLPUser1	02/06/2015 Documents by HLPUser1	02/06/2015 Sales Process by HLPUser1		
 Properties Existing Mortgages 	Notes Go Here & Can Be Entered Against Any Page Within Fact Find	Another Note	Note On Sales Process Screen		
Existing Policies	· -g- · · · · · · · · · · · · · · · · ·				
Liabilities	4	1	1		
Credit History				Pre	vious Next
 G Lifestyle Changes Budget Planner 	All Note	es will disp	olay every i	note	
Mortgage Requirements	which h	las been ac	ded within	the	
Mortgage Results	FactFind	and which	stage / page	e the	
Life Requirements			gainst. You		
Income Protection Requirements	edit or re	emove a not	e if necessar	у.	

7.0 SUBMIT BUSINESS

Once all mandatory FactFind data has been entered and you are in a position to complete the sales process you can then **'Submit Business'.** This will close off the FactFind so that no further changes can be made and update the 'master' 360 Lifecycle case record with the information entered and changes which have been submitted. You can clearly see once all mandatory data has been entered and when you can succesfully Submit Business from the colour coding on left hand process menu.

Submit Business

Once all mandatory data is entered the **Submit Business** label will move from red to green.

On choosing **'Submit Business'** you will be asked to confirm whether you wish to continue with the FactFind completion.

Submitting business will prevent any further changes to this fact find.



On selecting **'Yes'** to confirm the submission of business you will be provided with confirmation that the FactFind has been completed and can no longer be edited. At this point the 'master' 360 Lifecycle case record would have been updated with



the applicable information and the FactFind will be moved from 'In Progress' to 'Completed' and Outstanding Reports. From here you are presented with a number of options.

Quick Quote	Product Searc	ch Opportunities	In Progress Co	mpleted 12		Contact	Log off	*
	Fact Finds have	eports outstanding Recomme	ndation Reports.		Search:	Showing F		for:
Case ID ¢	Report Name ¢	Full Names	Submission Dat	e 🔺 Report Statu	+ Actions			¢
2192562	Test\Test	Man Test\Lady Test	04/04/2017 09:53	AM Outstandin	View Reopen Split Produce Rep	ort Mark	Complete	

- View This will open a PDF copy of the completed FactFind.
- Reopen Choosing Reopen will create a new and fully editable 'cloned' copy of the original FactFind. The newly cloned FactFind will be attached to a new opportunity against the 360 Lifecycle case record named 'Reopened Sales Process'.
- Split Creates a new Opportunity against the same case which you can then refer.
- Produce Report This will launch the Recommendation Report builder for generation of the Suitability Letter.
- Mark Complete This will allow Outstanding Recommendation Reports to manually be marked as complete e.g. if the recommendation report has been completed outisde of the FactFind.

7.1 Updates To The 360 Lifecycle Case Record

Once you have successfully submitted business the FactFind will no longer appear as 'In Progress' and will show within 'Completed Outstanding Reports' until a Recommendation Report has been completed. On confirming Yes to the submission of business the 'master' 360 Lifecycle case record is also updated. Some of the updates and changes made to the 360 Lifecycle case record are shown below;



1. The case record will include udpates to the client Personal Details and a new sale event created with the 'Chosen' policy records

🖆 Case ID - 2974219	Mr David Wresse	ll (30-Dec-92)	TBA			Change Address
					Exp	ort Case Untracked Emails
Portfolio	Client Details	Case Details 0	Contact History	Documents Revi	ews Client Circumst	ances
Assets Properties, Savings, Investments and Pensions	Client Details Client Type	Retail Client	•	Contact Details Home	Q	Work 💽
	Title		-	Mobile 0773731083	35	Email david.wressell@360lifecycle.cc
Financial Commitments	Forename					Client has no Email Address
Life Sales Opportunity David Wressell (21/11/2018)	Middle Names Surname			Additional Informa	ition	NI Number
Website Advised Sale (21/11/2018)	D.O.B.	30/12/1992		Status Contr	actor 👻	Income £0.00 ‡
LTA (Mr David Wressell) Abbey Life, On Risk	Sex	Male	•	Smoker No	•	Dependants 0 🗘
Accident & Sickness (Mr David Wressell)	Remove Dupli	oates 9 Potent	ial duplicate r	ecords found for David	ł	Add Client Remove Client
E General David Wressell (04/09/2018)	FullName Mr David Wr		me Phone	Work Phone	Mobile Phone 07737310835	Email david.wressell@360lifecy
E General David Wressell (04/09/2018)						
General David Wressell (04/09/2018)						
Website David Wressell (04/09/2018)						
	Data Privacy S					
	View/Edit Per	missions Privac	y Portal Reque	st		

2. Any existing arrangements will be added to the **'Portfolio'** section of the case record.

ase ID - 2974219	ſ	ife Policies Income	Protection Building And Contents			
		Add Pol	icy			
-III Client Portal	Ī	(
		Owner	Mr David Wressell 🔹	Policy Number		
Assets		Provider	Abbey Life 👻	Start Date		
Properties, Savings, Investments and Pensions		Policy Type	LTA 👻	Term (years)	20 🗘	
Description		Life Assured	Mr David Wressell 🔹	Guaranteed/Reviewable	💿 N/A 🛛 🤇	Guaranteed 🔘 Reviewable
Financial Commitments Mortgages and Other Commitments		Sum Assured	£100,000 \$	Waiver of Premium		,
Life Sales Opportunity		CIC/SIC Cover	£0 🌲	Purpose	Family	•
David Wressell (21/11/2018)		Benefit Type	~	In Trust		
		Premium	£4.09 ‡	Review Agreed		
LTA (Mr David Wressell) Abbey Life, On Risk		Premium Frequency	Monthly -	Review Date		
Accident & Sickness (Mr David Wressell)		Owner	Mr David Wressell 🔹	Policy Number		
General David Wressell (04/09/2018)		Provider	· · ·	Start Date	03/09/2018	
General		Policy Type	LTA + CIC *	Term (years)	0 ‡	
David Wressell (04/09/2018)		Life Assured	Mr David Wressell 👻	Guaranteed/Reviewable	🖲 N/A 🛛 🖉	Guaranteed 🔘 Reviewable
David Wressell (04/09/2018)		Sum Assured	£100,000 ‡	Waiver of Premium		
David Wressell (04/09/2018)		CIC/SIC Cover	£10,000 ‡	Purpose		*
		Benefit Type	•	In Trust		
		Premium	£10.00 ‡	Review Agreed		
		Premium Frequency	Monthly -	Review Date		



3. All sales process **Documents** produced through the Online FactFind will be automatically uploaded to the 360 Lifecycle case record e.g. electronic IDD, Illustration(s) and shortlisted sourcing results etc.

ase ID - 2974219	Mr David Wressell (30-Dec-	92) TBA				
- The Portfolio	Event Details Notes	Tasks Documents	Commission & Payments			
Properties, Savings, Investments and Pensions	Filter Documents Advise	d Sale (21/11/2018)	• View	Details	 Add Documents 	
Life, Income and B & C Financial Commitments	G 🕤 🛧 🗁 Adv	vised Sale (21/11/2018))		Show Search	
📒 Mortgages and Other Commitments	Name	Modified by	Date modified	Created by	Date created	
Life Sales Opportunity David Wressell (21/11/2018)	Comparison Summary	David Wressell	21/11/2018 10:54	David Wressell	02/10/2018 13:36	
Website Advised Sale (21/11/2018)	 Client Specific Illustr Product Key Featur 		21/11/2018 10:54 21/11/2018 10:54	David Wressell David Wressell	02/10/2018 13:37 02/10/2018 13:37	
LTA (Mr David Wressel) Abbey Life, On Risk	Online Fact Find	David Wressell David Wressell	21/11/2018 10:54 21/11/2018 10:54	David Wressell David Wressell	21/11/2018 10:54 21/11/2018 10:54	
Accident & Sickness (Mr David Wressell)	360 Accounts	David Wressell	21/11/2018 14:16	David Wressell	21/11/2018 14:16	
General David Wressell (04/09/2018) General David Wressell (04/09/2018) General David Wressell (04/09/2018) David Wressell (04/09/2018) David Wressell (04/09/2018) David Wressell (04/09/2018) David Wressell (04/09/2018)	Mov Template	David Wressell	14/01/2019 11:26	David Wressell	14/01/2019 11:26	

For further information on the 360 Lifecycle case record please refer to the other 360 Lifecycle Navigation Guides.

8.0 RECOMMENDATION REPORT

On successfully submitting business and completing the FactFind you will then be able to produce a Recommendation Report by choosing '**Produce Report'**. You can only produce a Recommendation Report against a FactFind which shows within '**Completed Outstanding Reports'**.



You can only produce the Recommendation Report once **Completed**

	Report office completed											
Quick Quote	Product Sear	ch Opportunities	In Progress Comple	eted 12	/			Cor	ntact Log off			
The following Show 10	• entries	e outstanding Recommen	·					Search:	Repor	e Produce t to launch port builder		
Case ID ¢	Report Name \$	Full Names ◆	04/04/2017 09:53 AM	Report Status ¢ Outstanding	View	Reopen	Split	Actions Produce Report	Mark Complete			
2195539	Test	lan Test	03/04/2017 12:45 PM		View	Reopen	Split	Produce Report	Mark Complete			
2195445	Test	Jenny Test	03/04/2017 11:48 AM	Due in 4 days	View	Reopen	Split	Produce Report	Mark Complete			
2195090	Today	Demo Today	03/04/2017 09:24 AM	Due in 4 days	View	Reopen	Split	Produce Report	Mark Complete			
2171004	Lead	Dummy Lead	24/03/2017 09:23 AM	Overdue	View	Reopen	Split	Produce Report	Mark Complete			
2163787	Test	Sam Test	07/03/2017 10:57 AM	Overdue	View	Reopen	Split	Produce Report	Mark Complete			
2161261	Test	Rodrigo Test	02/03/2017 03:56 PM	Overdue	View	Reopen	Split	Produce Report	Mark Complete			
2160799	Test	Viral Test	02/03/2017 11:07 AM	Overdue	View	Reopen	Split	Produce Report	Mark Complete			
2153753	Parkgate	Kevin Parkgate	23/02/2017 03:56 PM	Overdue	View	Reopen	Split	Produce Report	Mark Complete			
2150987	Test	LML Test	19/02/2017 05:35 PM	Overdue	View	Reopen	Split	Produce Report	Mark Complete			

Selecting 'Produce Report' will first direct you to the report builder upon where you can select which paragraphs you wish to include in the report.

Paragraph Selection		
Select the paragraphs you would lik	e to include in the recommendation report.	
Description		Included
Introduction		No Yes
Introduction - First Time Buyer	Select No or Yes to	No Yes
Introduction - Purchase	determine if the	No Yes
Remortgage - Reason	paragraph is in	No Yes
Income & Expenditure	scope to be included	No Yes
Term of Mortgage		No Yes
Mortgage Type - Introduction		No Yes
Mortgage Type - Fixed		No Yes
Features & Preferences		No Yes

Once you have selected the relevant paragraphs to be included you can then **'Produce Report'**.



Next Steps		No Yes
Solicitors		No Yes
Existing Protection		No Yes
Needs - Protection		No Yes
Needs - Income Protection		No Yes
Total Premium		No Yes
Replacement Policies		No Yes
Documentation / Next Steps	Produce Report once all	No Yes
Will	necessary paragraphs	No Yes
Signature Box - Joint	are in scope	No Yes
iew Fact Find		Produce Report

Copyright © 360 Dot Net 2014-2015

The fully editable Recommendation Report will then be launched.

Quick Quote Proc	tuct Search Opportunities In Progress Completed 13 Cr	ontact Log off	•
Recomme	endation Report for Test Client		
File Home I	nsert Page Layout View		^
Paste Clipboard	ABBCOD ABBCCC ABBCCC ABBCCC	 A B Replace 	
-	You can change fonts,		*
	size, bold and 4th April 2017		Ŀ.
	underline etc.		
	Meridian Business Park Leicester LE19 1XW		
	Your reference: 1599681		
	Dear John & Susan		
	Following our recent meetings / telephone conversations, I am writing to thank you for using Account Manager Demo Brand and to confirm the advice I have provided. Firstly, I would like to confirm that during the meeting, I provided you with disclosure about our services and charges.		
	Summary of Discussions		

Quick Quote Product Search Opportunities In Progress Completed 13

You can change **Save** draft, **Save As** to export to another format e.g. Word or **Print**

Recommendation Report for Test Client





Any text requiring completion can be highlighted. You can use the scroll bar to navigate and make changes where necessary

OR				
You told me you do r	ot currently have ar	ny existing insurance policies in place.		
			Text requiring completion	
Protection Needs Choose from the follo	wing			
		following protection needs:-	will be highlighted in red	
Туре	Term Only			
Assured Basis	First Life			
Term Basis	John Factfind			Use the scroll ba
Term	To Age			
Cover Basis	60			to navigate the
Criteria	Life Only			to havigate the
				Report
OR				
		de financial security for your family in	the event of death or critical illness. You told me you did not wish to discuss this at	
present because Inse	rt Free Text			
Income Protection N	oode			
Choose from the follo				
During our discussion	is we agreed on the	following income protection needs:-		
OR	del constant a series		a stale and a stale state of the	
present because Inse		ct your income in the event of acciden	it, sickness or unemployment, however you told me you did not wish to discuss thi	sat
present because inse	refree fext			
Total Premium				
			ne during the life of the policy however if your monthly premium were to change	for any
reason, the actual an	nount you will have p	paid over the term of the policy will di	iffer from this figure.	
Next Steps				
	with a Statement o	of Price (Ouotation) and a Key Facts /	Key Features Document for each of the proposed policies and advise you to rea	ad them
			ained your right to cancel should you wish to change your mind within the cancel	
period.				
				·
View Fact Find	Restart	Com	🕨 🚽 plete to generate	Complete
How Pactrind	Hostan			
		the f	inalised report	

View FactFind will launch the FactFind as a PDF document. **Restart** will remove any changes.

Once you have made the necessary amendments to the Recommendation Report choose **Complete** where you will be asked to confirm if you would like to continue.

Once completed, you will be no longer be able to edit this recommendation report.

Do you want to continue?



Selecting **'Yes'** to the completion will upload a copy of the Recommendation Report to the Documents section of the 'master' 360 Lifeycle record and move the case into '**Completed / Completed Reports'.**

- View Will open a PDF copy of the FactFind
- Reopen Will launch a newly cloned FactFind
- Split Creates a new Opportunity against the same case which you can then refer
- Download Report To open a PDF copy of the Report



Completed Reports The following Fact Finds have been completed, including their Recommendation Report. Show 10 • entries Search: Case ID • Report Name • Full Names • Submission Date • Completion Date • Actions • 1599681 Factfind\Factfind John Factfind\Susan Factfind 17/08/2016 04:33 PM View Reopen Split Download Report

9.0 CREATING OR AMENDING RECOMMENDATION REPORT TEMPLATES

The Recommendation Report paragraph selection items and associated wording are pulled through from the information which is captured in the Recommedation Report Template. The Recommendation Report Template can be acessed by logging into 360 Lifecyle Office, however please note that anyone accessing the Recommendation Report Template will themselves need the role of either 'System Administrator' or 'Compliance Managers'.

9.1 Getting Started

Login to 360 Lifecycle Office from the shortcut on your Desktop. Once 360 Lifecycle has opened click onto the 'Maintenance' tab to access 'Compliance'. From here choose 'Setup Recommendation Report' and select **'Online FactFind'.**



From within 360 Lifecycle Office select Maintenance > Compliance > Setup Recommendation Report and **'Online FactFind'.**

You will then be taken to the Recommendation Report Template and where any existing templates will be displayed within the Content tab.



						Recom	nmendation R	eport Templa	te - 360	Lifecycle - Office					-	Ø	×
	Home Tools /	Accounts	Maint	enance	Windows												
New Cas	se Save Refresh New/Save	es Diary Views		Brands	Introducers Negotiators	Mortgages	B&C Life I		ncome tection *	Pensions Investments	SPOC Manager SPOC Manager	Groups	General	Clients Complia Other			
	Recommendation Report Temp	late X															<
N	Content Header And Foot		ie Lavout														
C3	Ticader And Food	u ru	ic Edyour														
Case Search	Add Rem	nove	Template	Name	Online Factfind												
		-	Paragraph	Title	Introduction			Show	v 0	nce Only			-				
Neports	Move Up Move	Down	Dicelay O	ntioner	Mandatory Paragraph		No Producte S	old II Morta	208 2	Protection Z Building	c and Contents		_				
Rep	Introduction	-	Display Options: Mandatory Paragraph 🗸 🗌 No Products Sold 📝 Mortgage 📝 Protection 📝 Buildings and Contents														
orts	Mortgage Type - Introductio Introduction - First Time Bu		Conditions:														
	Introduction - Purchase	yei	Paragraph	Text:													
	Remortgage - Reason		: 🖭 🛇	/ = 6	🔒 🗠 🛹 💌 🖸 Calibri		¥ 1	11 - A	74 3) B I U U S	c. v ² v	An - 1852 -	A = /				
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	Repayment Method - Intere														<field>Long Da</field>	te <th>d> 📩</th>	d> 📩
	Term of Mortgage		Field	Sclient	Details - Name <th></th>												
	Term of Mortgage - Beyond Mortgage Type - Fixed	Retir			Details - Address <th></th>												
	Mortgage Type - Capped																
	Mortgage Type - Discounted	d	Your	referenc	e: <field>Case ID<th>id></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th>=</th></field>	id>											=
	Mortgage Type - Tracker		Dear	< Fields(Client Details - Salutati	onc/Fields											
	Mortgage Type - Offset Mortgage Type - SVR		Deal	<rieiu×< th=""><th>silent Details - Salutati</th><th>ins/rieluz</th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th></rieiu×<>	silent Details - Salutati	ins/rieluz											
	Features & Preferences Following our recent meetings / telephone conversations, I am writing to thank you for using <field>Advisor Details - Business Name</field> and to confirm the advice I have																
	Loan to Value		provi	ded. Firs	tly, I would like to cor	firm that d	during the m	neeting, I pro	ovided	you with disclosure a	about our serv	ices and ch	arges.				
	Personal Circumstances									Summary of Discuss	land						
	Fees Cradit History Advance	Ŧ								Summary of Discuss	NUTS						•
	4	•	4														- F
Ready																	

9.2 Amending Recommendation Report Content

The Content tab will provide you with access to create, remove and re-order any recommendation paragraphs. Each paragraph will have its own '**Title'** and associated wording which is then displayed when producing the report within Online FactFind. Paragraphs can be set to show as '**Once Only'** or multiple times for each submission item e.g. '**For Each Mortgage'**. You can choose which submission product(s) a paragraph relates to by ticking either '**Mortgage'**, '**Protection'**, '**Buildings & Contents'** or '**No Products Sold'**. Finally, you can choose whether the paragraph should be set as '**Mandatory'**, '**Optional'** or '**Conditional'** from selecting the relevant '**Display Options'**. Please note that where a paragraph is set as '**Conditional'** the applicable '**Conditions'** will then need to be set.



Choose 'Save' after making any changes

	/			Recommendation Rep	ort Template - 360 Lifecycle - Office			- 0 ×	
	Hom Too	ols Account	Maintenance	Windows					
New Ca	se Save Refresh New/Save	Branches Diar Viev		Colucers Negotiators	rance Income Pensions Investments Protection Pensions Investments Details	SPOC Manager User Access Groups SPOC	General Clients Compliance		
	Recommendation Rep	oort Template	1					4 +	
1	Content Header	And Footer F	age Layout						
Case Search	Add	Remove	Template Name	nline Factfind	Show Once Only		*		
Ę.	Move Up	Move Down							
Neports	Introduction	-	Display Options:	andatory Paragraph	V Mortgage V Protection V Building	s and Contents	_		
ports	Mortgage Type - In		Conditions:	Conditions:					
	Introduction - First Introduction - Pure		Paragraph Text:						
	Remortgage - Rea								
	Income & Expendi Repayment Metho			[1 ×] [A ∧ ∧ →] Calbri → 11 → A A ⊗ B / U U S S X' X, Aa + 22 + A + A → [E E Σ Ξ Ξ [F + ⊗ + Ξ] + [A ∧ Ξ] / [A ∧ Normal → Aa +] 00 Ω →					
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	Repayment Metho							<field>Long Date</field>	
	Term of Mortgage Term of Mortgage		<field>Client</field>	ails - Name					
	Mortgage Type - F		<field>Client</field>	ails - Address					
	Mortgage Type - C		Your referen	Fields Care IDc /Fields					
	Mortgage Type - D Mortgage Type - T		Your reference: <field>Case ID</field>						
	Mortgage Type - C	Offset	Dear <field></field>	Dear <field>Client Details - Salutation</field>					
	Mortgage Type - S								
	Features & Prefere	ences	Following our recent meetings / telephone conversations, I am writing to thank you for using <field>Advisor Details - Business Name</field> and to confirm the advice I have provided. Firstly, I would like to confirm that during the meeting, I provided you with disclosure about our services and charges.						
	Personal Circumsta	ances							
	Fees				Summary of Discuss	ions		-	
	Cradit History Ad	>	4					÷	
Ready									

You can **Add** or **Remove** paragraphs and reorder by choosing **Move Up** or **Move Down.** This is the order the paragraphs will be displayed within Online FactFind

Template Name	Online Factfind		
Paragraph Title	Mortgage Type - Fixed	Show	For Each Mortgage
Display Options:	Conditional Paragraph - No Products Sold 🗹	Mortgage	Protection 🔲 Buildings and Contents
Conditions:	Mortgage Scheme		Fixed
Paragraph Text:			
🛍 📈 🗊 🛱		`A 'A	▶ B I <u>U</u> <u>U</u> + + X' X, Aa + ♥ + A + A +
18 19 19 19	🔄 qn 🗉 🗉 🔳 📒 • 🖄 • 🖏 • 🎶 🛚	ormal	· AA - 0.0 AB -
rise during the		ould not	buld not be subject to change for a period of time. You are aware that although your payments will not benefit from lower payments. You are also aware that the fixed rate will end after a period of time, and e

- Paragraph Title Paragraph name which will show in Online FactFind
- Show Either 'Once Only' e.g. Introduction paragraph or for each product entered in submission sheet e.g. 'For Each Mortgage'
- Display Options Tick Product(s) the paragraph relates to. Select if the paragraph is 'Mandatory', 'Optional' or 'Conditional'. Where 'Conditional' then what 'Conditions' need to be met. Please note that Mandatory or Conditional paragraphs cannot be deselected when choosing Produce Report in Online FactFind
- Paragraph Text Wording which is associated to the paragraph and that will be pulled through to the Online FactFind Recommendation Report

When amending the **'Paragraph Text'** you can include merge fields and have access to various editing tools e.g. ability to choose font name, size and colour etc....



aragraph Text:				
○ × ■ □ × // ○ × ■ □ × // ○ × □ □ × □ × // ○ × □ □ × □ × □	▼ Calibri ▼ 11 ▼ A A B I U U S S X' X, Aa + 22 + A A Ξ Ξ Ξ Ξ Ξ Ξ Ξ Ξ Ξ I A A A A A A A A A	1		
Recommendation In order to reach my rea following mortgage(s). Proposed Mortgage	commendation, I have considered the above Needs and Preferences and compared this to what is available in 1	the market. I am pleased to recommend the		
Property	<field>Address Line 1</field>	Choose Font Name,		
Lender	<field>Lender Name</field>			
Loan Amount	<field>Loan Amount</field> plus <field>Mortgage Lender Fee</field> to be added to the loan	Size and Colour etc.		
Term	<field>Mortgage Term</field>	via the ribbon with		
Payment	<field>Monthly Payment</field>			
Initial Rate	late various editing tools.			
		-		

Merge Fields can be included by 'right clicking' within the Paragraph Text. 'Insert Field' provides individual merge items e.g. Mortgage Initial Rate. 'Insert List' will group multiple merge items and list together within the Recommendation Report (see below chart)

9.3 Header and Footer

You can include a Header & Footer within the Recommendation Report Template. Please note that you can paste images into the Template or choose the **'Branding Image'** merge field. This will then display the uploaded image (found in Staff Members) of the individual who produces report.

Recommendation Report Template - 360 Lifecycle - Office	– 0 ×
Home Tools Accounts Maintenance Windows	
Image: Same Same Same Same Same Same Same Same	
Weins Members Protection Groups * * New/Save Entities External Datalas SPOC Other	
	× + ×
Content Header And Footer Page Layout	
Recommendation Report Tempale X Content Header And Footer Page Layout Header Image Content Image Content Header Image Content Image Content Image Content Image Content Image Content Image Content Image Content Image Content Image Content Image Content Image Content Image Content	
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<field>Branding Image</field>	*
Footer	
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4	×



9.4 Page Layout

Recommen	dation Report Template	×	
Content	Header And Footer	Page Layout	

If desired the Recommendation Report margins can be altered within Page Layout.

Margins

Left	1.0000	Inches
Right	1.0000	Inches
Тор	1.0000	Inches
Bottom	1.0000	Inches

9.5 Amending Recommendation Report Content with the 'Report per FactFind Template' Editor

NOTE – if one of these templates is not populated, you will automatically get the report produced from the template edited above.

The Content tab will provide you with access to create, remove and re-order any recommendation paragraphs. Each paragraph will have its own 'Title' and associated wording which is then displayed when producing the report within Online FactFind. Paragraphs can be set to show as 'Once Only' or multiple times for each submission item e.g. 'For Each Mortgage'. You can choose which page in the FactFind configuration you are working with by selecting an entry from the 'Page' dropdown. All paragraphs will be assumed to be 'Mandatory', unless you tick the 'Optional' tickbox, or add in a 'Condition' based on the page you are working against, e.g. Submission Sheet.

N.B. some pages do have additional 'Sections' included (see FactFind Configuration for more detail) – meaning you can filter these further if required, e.g. Income 'Page', Self Employed 'Section'

Choose 'S	Save' after making any
changes	
46	Recommendation Report - Mortgage Advice - 360 Lifecycle - Office – Office – Office – Office
Hone Tolk Accounts Mantanance Vindows	rs Registers B & Life Insuence Present Presenter Stock Anager User Access Groups Stock - Groups
Recommendation Report - Mortgage Advice X	Clin Design CLive
Control Layout Recommendation Paragraph Description Paragraph Description Paragraph Description	
You can Add or Remove	in Martgages · · · · · · · · · · · · · · · · · · ·
paragraphs and reorder by	* Add Condition Edit Condition Edit Condition
choosing Move Up or Move	Calbri - 11 - A A A · 日日 P 留 昭 印 AaBbCc0dE AaBbCc0dE / 00 Find
Down. This is order the	Special B I U U S S X ¹ X, A · 2 ² · 3 ³ E = 1 = 15 · 3 ³ · 1 Fort S Parcech S Styles S Edward
paragraphs will be	aph for your Recommendation Report.
	istingMortgagesCount Sheet.NewGeneralinsurancePoliciesList valiable.BusinseRName

FactFind



Recommendation Report - Mortgage Advice	()
🛨 🗶 👌 🖓 💾 🔚	Clin Design Olive
Add Remove Move Up Move Down Save & Close Save F	sct Find Config
Content Layout	
Recommendation ParagraphDescription	Recommendation
Page	Submission Sheet
Section	Mortgages -
Show	Show Once Group Optional
Conditions	Add Condition
	Edit Condition
	Remove Condition

- Paragraph Description Paragraph name which will show in Online FactFind
- Show Either 'Once Only' e.g. Introduction paragraph or for each product entered in submission sheet e.g. 'For Each Mortgage'
- Page Select the page of the Online FactFind you want this paragraph to link to.
- Section this will appear if the Page selected has multiple sections.
- Add Condition here you can add conditions based on the page you are linked to, e.g. Page = Submission Sheet, Section = Mortgages, conditions will look at the fields on the Mortgages tab of the Submission Sheet of the FactFind

When amending the **'Paragraph Text'** you can include merge fields and have access to various editing tools e.g. ability to choose font name, size and colour etc.

Paragraph Text:					
î × I î × ~ - :: :: :: :: :: :: :: :: :: :: :: :: ::	$\begin{array}{c c c c c c c c c c c c c c c c c c c $				
Recommendation In order to reach my recomm following mortgage(s).	endation, I have considered the above Needs and Preferences and compared this to what is available \mathbf{n} th	ne market. I am pleased to recommend the			
Proposed Mortgage		Choose Font Name, Size			
Property	<field>Address Line 1</field>				
Lender	<field>Lender Name</field>	and Colour etc. via the			
Loan Amount	<field>Loan Amount</field> plus <field>Mortgage Lender Fee</field> to be added to the loan				
Term	<field>Mortgage Term</field>	ribbon with various editing tools			
Payment	Field>Monthly Payment				
Initial Rate	<field>Initial Rate</field>				
	+	4			

Merge Fields can be included by 'right clicking' within the Paragraph Text. 'Insert Field' provides individual merge items e.g. Mortgage Initial Rate. 'Insert List' will group multiple merge items and list together within the Recommendation Report (see below chart)

9.6 Layout

You can include a Header & Footer for all your trading styles (if applicable) within the Recommendation Report Template. Please note that you can paste images into the Template or choose the **'Branding Image'** merge field. This will then display the uploaded image (found in Staff Members) of the individual who



produces report. From here you can also edit the margins on your Report template.

Recommendation Report - Mortgage Advice	×	< →
Add Remove Move Up Move Down	Image: Save & Close Save & Close Save & Fact Find Config	
Content Layout		
Account Manager Demo Brand DemoPortal	Header	
	Calbri 11 A Aa Image: Calbri AaBbCcDdE AaBbCcDdE AaBbCcDdE ABbCcDdE ABBCCDDE <td></td>	
		*
	Footer	
	Calbri · 11 · A · A Aa · 部目目版 雪 印 AsBbCcDde AsBbCcDde · OS Find	
	Paste Special B / U U S S X X, A · · · · · · · · · · · · · · · · · ·	
		A

N.B. these templates are configured PER FactFind you have created within 360. This means if you want a template for each of these, they will need to be added in. If you require these to be copied from one template to another, please contact our Support team.

10.0 FACTFIND CONFIGURATION

Within 360 Lifecycle, you have the ability to configure your own versions of the Online FactFind. Within these versions, you can remove tabs and sections from within these, as well as re-order these where necessary.

You can create as many versions of the Online FactFind as you need, and convert these throughout the Sales Process if circumstances do change.

10.1 Adding, Amending and Removing FactFinds

Within 360 Office, you have the ability to add new, amend or remove existing FactFinds. This section can be located in the Maintenance Tab, under the Compliance dropdown shown below.

Once you click on this, you will greeted with the following screen, which will house all of the current versions of the FactFind you have created.





Buildings And Contents Only						
Mortgage Advice						
Mortgage Only	Add Save Delete Clone					
Protection Only						
	FactFind Configuration Name					
	Name Mortgage Advice					
				C 1		
	Product Discussion	V Income Prote	ction	Status		
	Protection	Pensions	Cuon	In Design		
	▼ B&C	Investments		😑 Live		
	Fact Find Page	Advisor	Fact Find Section	Adviso	r 1	
	> *Advice Process	V	> *Advice Process	V		
	*Applicants	v	Invite Client	V		
	Dependants	v	*Case Information	V		
	Initial Thoughts		*Case Roles	V		
	Income	V	Idd	V		
	Address History					
	Properties	V				
	1	Ļ				
		Include				
	Budget Planner (Post)		Budget Planner Version			

The options above the configuration screen itself allow you to do the following actions;

- Add this will create a blank configuration screen for you to create a brand new version of the Online FactFind
- Save this will save any amendments made to the version you have selected
- Delete this will remove the selected FactFind version. Please contact the Support team if you wish to do this
- Clone this will create a carbon copy of the selected FactFind version and create a new one under the same name, with a suffix on Clone. For example, if you were to clone the 'Mortgage Advice' FactFind, a new version would be created called 'Mortgage Advice Clone'

Each FactFind will have it's own '**Name**', which will be visible to those creating FactFinds via the Hotbox, the Online FactFind, or converting to a different version mid sales process.

You then have the ability to tailor the '**Product Discussion**' within that particular FactFind. This will allow you to pick a combination of 'Mortgage', 'Protection', 'B&C', 'Income Protection', 'Pensions' and 'Investments'. This also dictates the sections shown in the 'Submission Sheet' tab of the Online FactFind. You can have as many or as few selected as you want. Below is a run through as to what these pages will show;

- 'Mortgage' having this section ticked will make the Mortgage Requirements/Results, Secured Loan Requirements/Results pages available, along with the tabs to add Mortgage & Secured Loan policies on the Submission Sheet. This is also the only Product Discussion that will require a minimum of 3 Years Address History.
- 'Protection' having this section ticked will make the Life Requirements/Results pages available, along with the tab to add Life policies on the Submission Sheet.



- 'Income Protection' having this section ticked will make the Income Protection Requirements/Results pages available, along with the tab to add Income Protection policies on the Submission Sheet.
- 'B&C' having this section ticked will make the B&C Requirements/Results pages available, along with the tab to add General Insurance policies on the Submission Sheet.
- 'Pensions' having this section ticked will show the tab to add Pension policies on the Submission Sheet.
- 'Investments' having this section ticked will show the tab to add Investment policies on the Submission Sheet.

N.B. if you have 'Protection' and 'Income Protection' in the same FactFind, this will also open up the Multi Benefit Policies tab on the Submission Sheet.

The '**Status**' option, allows you to make amendments to FactFind versions without these veing made available immediately in the FactFind itself. The option for 'In Design' will allow you to make these changes, then once you are happy with these you can change the status to 'Live' so this is then available to all users.

The screen will then allow you to tailor the sections and sub-sections you can see in the online FactFind. This is split between '**FactFind Pages**' and '**FactFind Sections**'.

The 'FactFind Pages' section outlines all of the options which will be displayed down the left hand tab of the Online FactFind, and the 'FactFind Sections' are the subheadings within that particular tab. For example, **Income** will be an option in 'FactFind Pages', and a option within 'FactFind Sections' would be **Employed Details** or **Self Employed Details**. The pages in the Online FactFind Configuration screen will show exactly what the name suggests, i.e. 'Income' will allow for client income to be keyed, and 'Existing Protection' will allow for any existing client protection policies to be added in.

Some pages and sections within this screen are mandatory to the Online FactFind and cannot be removed. These are notated by a * next to the name itself, such as **Sales Process** and **Applicants**. These can, however, be re-ordered where necessary.

The upward and downward facing arrows give you the ability to re-order your FactFind. For example, putting **Address History** and **Income** pages above the **Dependants** page. This can only be done for tabs down the left hand side of the page and not the sub headings within these pages.

The final piece of the FactFind you can configure is the type of Budget Planner available and whether you would like a Post Sale Budget Planner with this. You can select from one of the two options below;



- Comprehensive Mortgage Budget Planner
- Wealth Budget Planner

All of the above can have a Post Sale Budget Planner applied, which will allow you to advise of the incomings and outgoings once a policy has been recommended to the client.