

# How To...

## Access the Online Fact Find

### Introduction

The Key offers the facility to allow existing clients to access their Fact Find data online. This feature allows clients to complete the Fact Find at their own convenience. The remainder of this document explains the steps necessary to set this up.

Accessing the online fact find requires the user to use Internet Explorer as their web browser.

### Setting Up the Online Fact Find

Before granting the client access to the Fact Find, this functionality must be 'turned on'. To access the online fact find configuration:

- 1) From within the left hand navigation panel select Setup > General.
- 2) Select the 'Online' Tab.

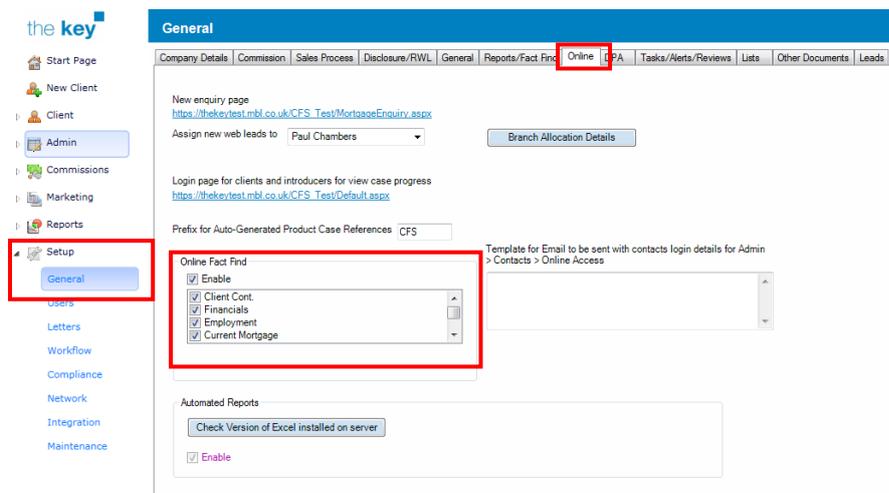


Figure 1: Enabling and Configuring Online Fact Find Access (Setup>General>Online)

To make the Online Fact Find available, ensure that a tick is present in the appropriate box as highlighted in Figure 1. The sections that can be presented are then listed, and those with a tick next to them will appear on the copy of the Fact Find that the client can view and edit.

### Setting Up Client Access

The online fact find is launched from within the Client Portal. To enable access for a client, go to Client > Admin > Client Portal.

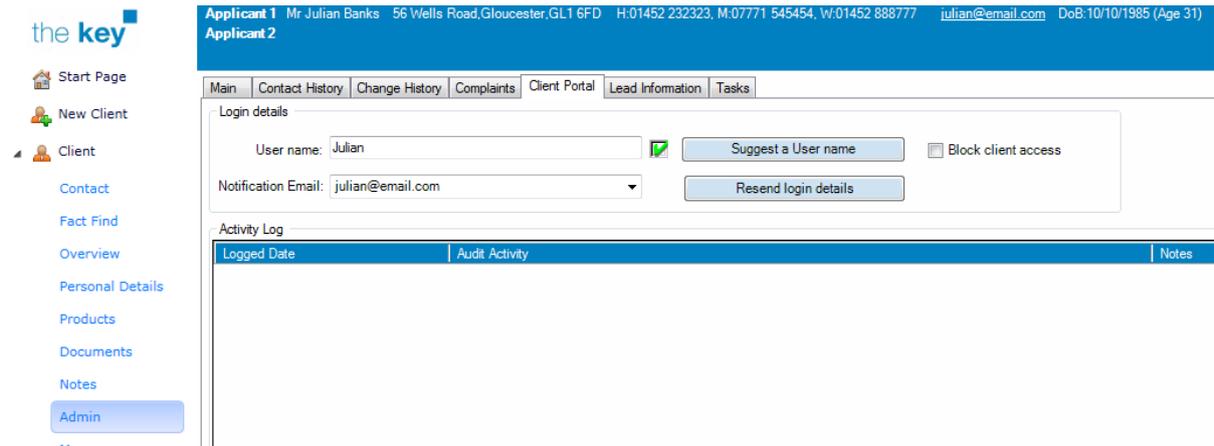


Figure 2: Creating Client Account

This screen will allow a User name to be created (this will default to Applicant 1’s email address) and alternative user names can be chosen from a number of suggestions offered by the ‘Suggest a User name’ button. There is no need to create a password, as this is automatically generated by the system. These login details are then sent to the email address shown by clicking on the ‘Resend login details’ button which will send two emails: the first with the login details and second with the automatically generated password.

Note that when login details are emailed, a record will be kept in the ‘Activity Log’ that is displayed on this page. This will record all online activity associated with this client.

The client will receive details of the web address to visit, as well as their user name and login details. Upon opening the link, the client will be asked to login. Upon first logging in, the client will need to change their password.

## Accessing the Fact Find Online

After logging in, the client will see the portal’s home page, an example of which is shown below.

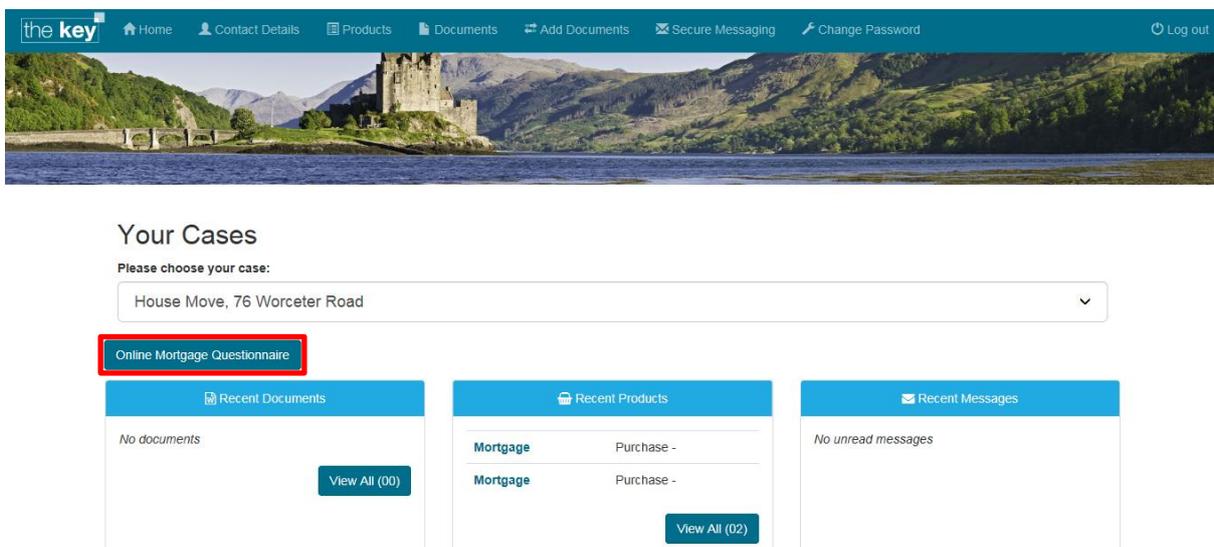


Figure 3: 'Home' Page After Client Login

To open the Fact Find, click 'Online Mortgage Questionnaire'.

### First Run Requirements

When launched, the Key will initiate a check of the system requirements (if required) before downloading a copy of the local Fact Find to the client's PC.

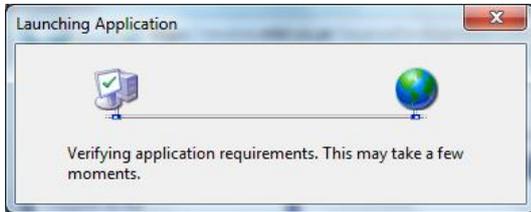


Figure 4: Verifying System Requirements Dialogue Box

After the online fact find application's system requirements test has completed, prior to downloading and launching the Mortgage Questionnaire application, the client might also be prompted with a security warning message.



Figure 5: Application Run – Security Warning prompt

The client should click 'Run' if prompted with the above message to initiate the download of the online fact find.

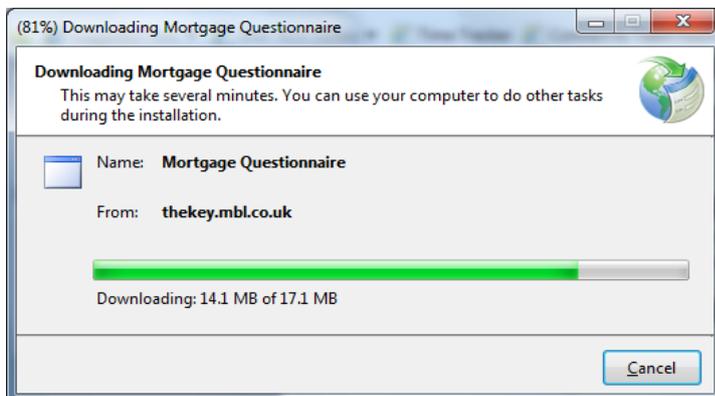


Figure 6: Downloading Fact Find Dialogue Box

The local copy of the Fact Find will appear as below:

The screenshot shows a web-based form titled 'Local Fact Find Screen'. It is divided into two columns for 'Applicant 1' and 'Applicant 2'. The form includes the following fields and options:

- Relationship to other applicant:** Dropdown menu.
- Tax Rate %:** Dropdown menu.
- Nationality:** Dropdown menu (set to 'British').
- Do you have any Dependents:** Radio buttons for 'Yes' and 'No' (selected), with a 'More' button.
- Date moved into your current address:** Date picker (set to 11/10/2011) and a 'Previous address' field.
- Current residential status?:** Dropdown menu (set to 'Owner').
- If renting, how much do you pay £:** Input field for amount and a dropdown for frequency.
- Are you leaving rental accommodation when new mortgage completes?:** Radio buttons for 'Yes' and 'No'.
- Are you on the electoral roll there?:** Radio buttons for 'Yes' and 'No' (selected).
- Are you in good health?:** Radio buttons for 'Yes' and 'No'.
- Do you have any religious beliefs that could affect mortgage planning?:** Radio buttons for 'Yes' and 'No'.
- Have you smoked in the last 12 months:** Radio buttons for 'Yes' and 'No'.

At the bottom right, there are 'Next >>' and 'Save' buttons.

Figure 7: Local Fact Find Screen

The Fact Find is now editable for completion as it would be within the Key, i.e. all functionality remains in effect. Note that while the client is updating the Fact Find the advisor will be unable to make any modifications.

If the client is unable to edit the Fact Find, their file may be 'locked' open within the Key. To unload the client, the advisor will need to access the Client Search Screen and click on 'Unload Client' at the bottom of the screen

The screenshot shows the 'Client Search' interface. It includes a search bar with filters for Surname, Advisor (ShalinNoBranc), Branch, Postcode, DOB, Type (Clients), and Sales Process (Open). There are buttons for 'New Client', 'Delete', 'Open Client', 'Reassign', 'Search', 'Import', and 'Export'. Below the search filters, it says 'Client search results: 0 client(s) found. [Click here to customise results.](#)'

Surname	Forename	App2 Surname	Address Line1	PostCode	Home Tel	Email	DOB	Last Modified

At the bottom of the screen, a red box highlights the text: 'Current Loaded Client: RepaymentMethod\_Test' with an 'Unload Client' button next to it.

Figure 8: Unlocking a Client

Once the client has finished editing they will press the 'Save' button and close the application.

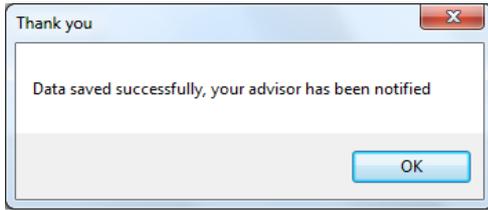


Figure 9: Save Confirmation Dialogue Box

A task in the Key will be automatically generated for the advisor to tell them the client's Fact Find has been modified:

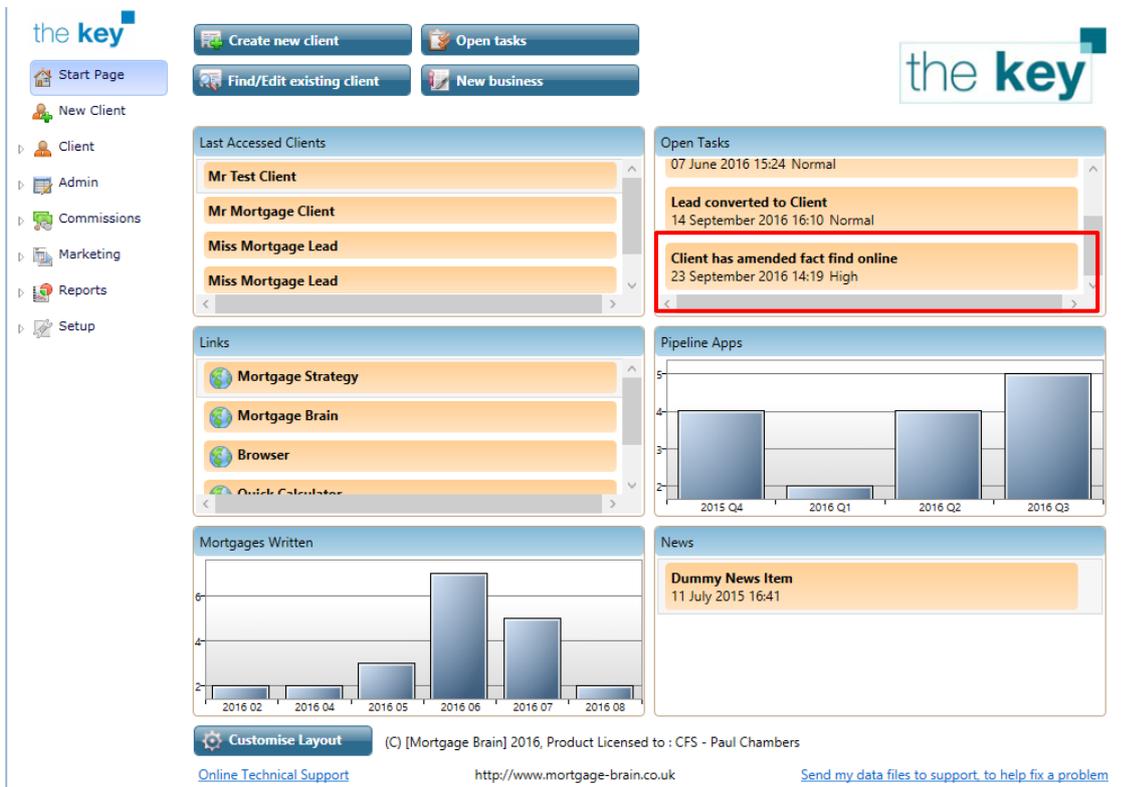


Figure 10: Task Displayed within the Key start page 'Open Task' Widget

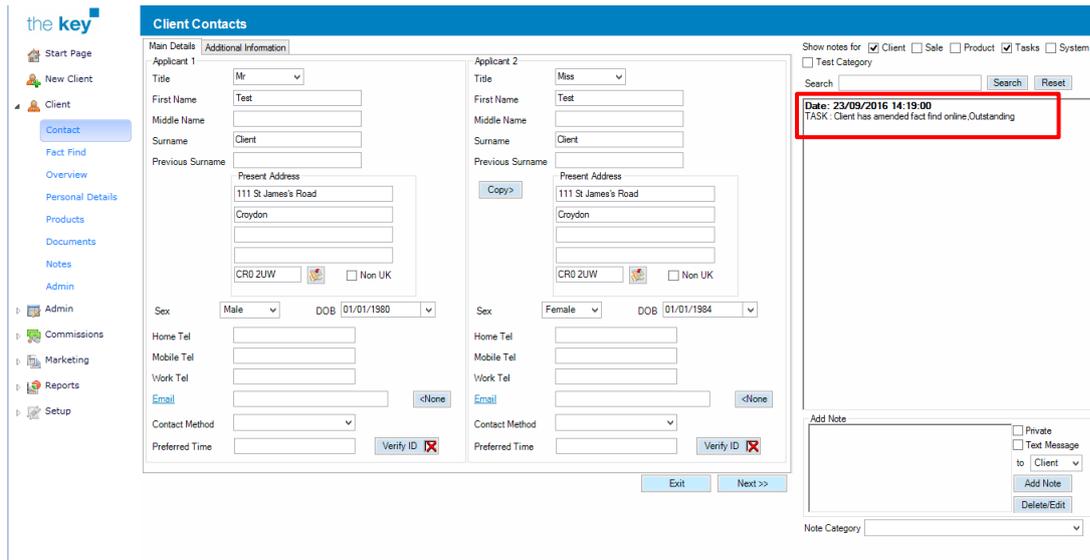


Figure 11: Advisor Task Note in Client Record

When the advisor next accesses the Fact Find they will see the new data items that have been added.

### Resetting the Online Fact Find password

In the event a client is unable to access the online fact find due to misplacing their login credentials, their password can be reset and new credentials can be issued to the client by:

- 1) Logging into the Key and open the client’s record.
- 2) With the client’s record open, navigate to Client > Admin > Client Portal
- 3) Click on the ‘Resend login details’ button
  - a. This will resend the client’s login name, and also a new password

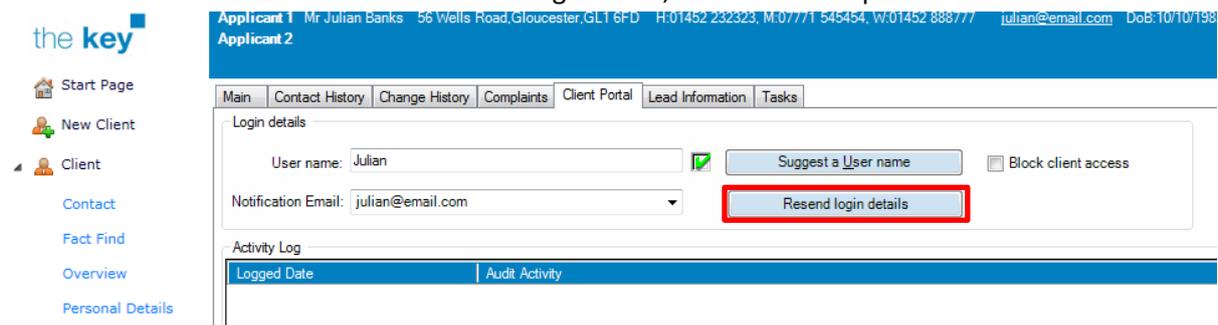


Figure 12: Resending Login Details

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