How To…
Create the Reasons Why Letter (RWL)

General

A Reasons Why Letter (RWL) can be generated either for multiple products from the fact find sale screen, or for each individual product within the corresponding Product Details screen.

Fact Find Sale Screen: Launching the RWL

A RWL can be generated from the Client > Fact Find screen using the button that appears alongside the date log. The 'Create Reason Why Letter' button will launch the RWL for the associated sale as highlighted in the list of sales, as shown in Figure 1 below.

Figure 1: Fact Find Summary

The 'Create Reason Why Letter' button will be greyed out if there are no products associated with the selected sale. Products that have a status indicating that they are not progressing (e.g. Not proceeded with, or Declined by Client) will not be displayed in the 'Select product(s) for Reason Why Letter' screen.

Selecting Products to be Referenced in the RWL

When launching the RWL, a dialogue box will appear asking for confirmation of the products to be referenced in (that is, form part of) the letter. Those to be included will need to be selected via a tick box, and a 'RWL product type' should be selected – this is the template that will be used for that part of the RWL - as shown in figure 2 below.
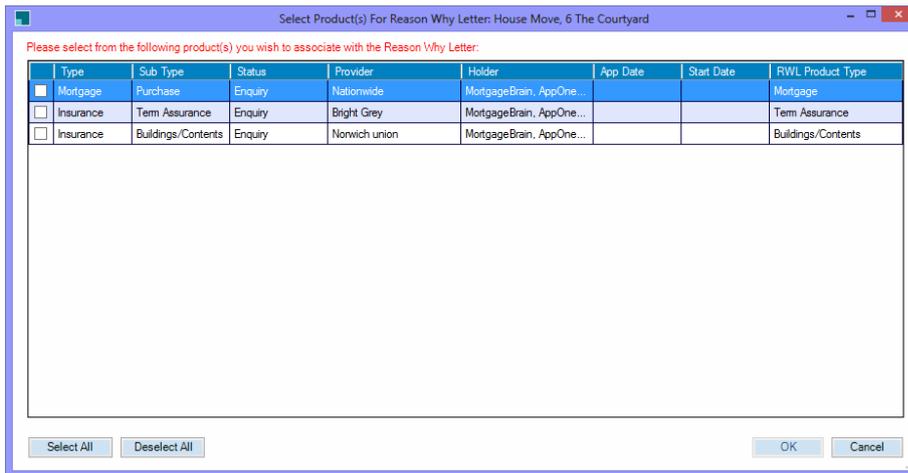
Figure 2: Products available for creation of RWL

Completing the RWL

Paragraph Selection

Each product identified for inclusion is represented with its own tab, as shown below. If there are multiple products of the same type, they will be differentiated by a number, e.g. mortgage 1, mortgage 2 etc. The Lender name and Short description of the Product will also be displayed in each tab to avoid confusion, as shown in figure 3 below.
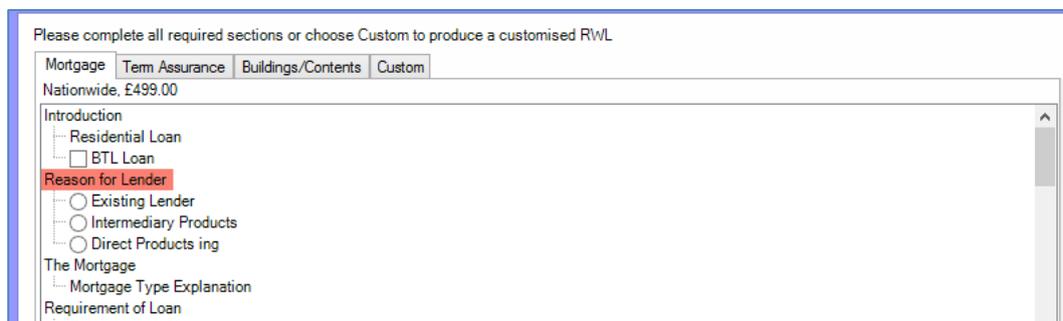

Figure 3: RWL Product Tabs

Using the Custom Tab

In some cases it may be preferable to create a custom RWL using selecting some of the paragraphs within the standard RWL wizard, but not all. This can be achieved adding selected paragraphs to the Custom tab.

To add a paragraph to the Custom tab, right click on the section within the Mortgage (or any other) tab that is to be included and select the 'Copy to Custom' option. There is also the ability to 'Copy All To Custom', as shown in figure 4 below.
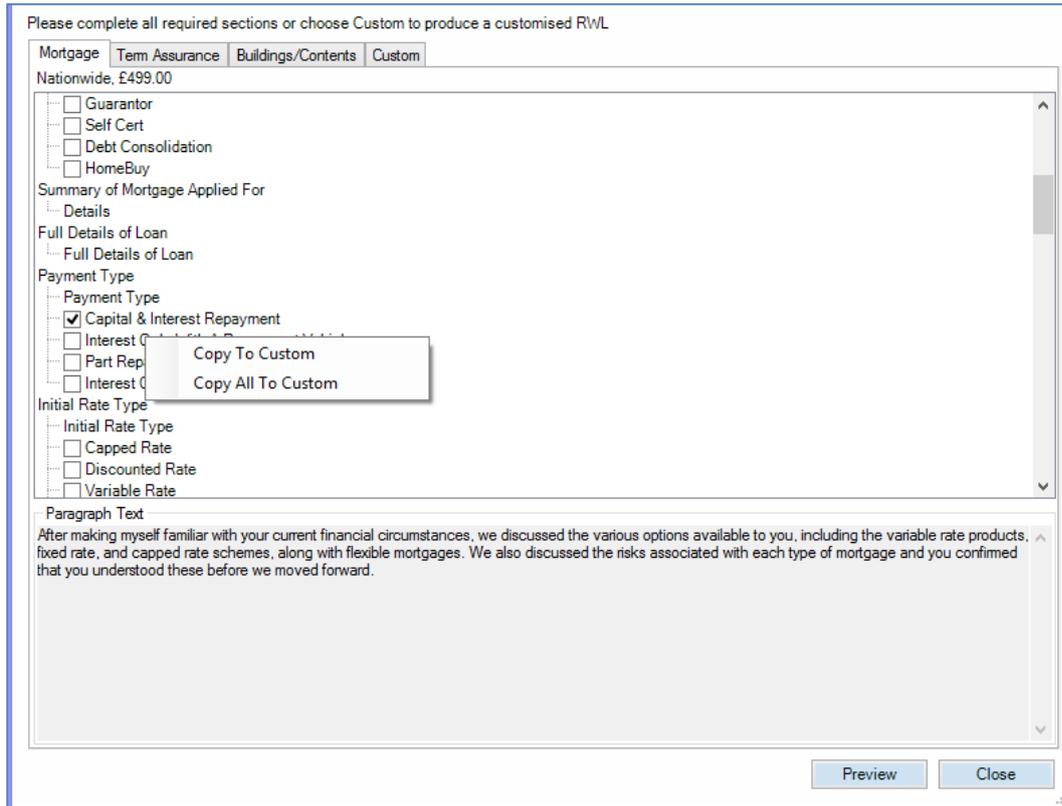
Figure 4: Copy To Custom Options

A section can only be added once; if an attempt is made to add duplicate sections the following warning message will be displayed, as displayed in Figure 5 below.
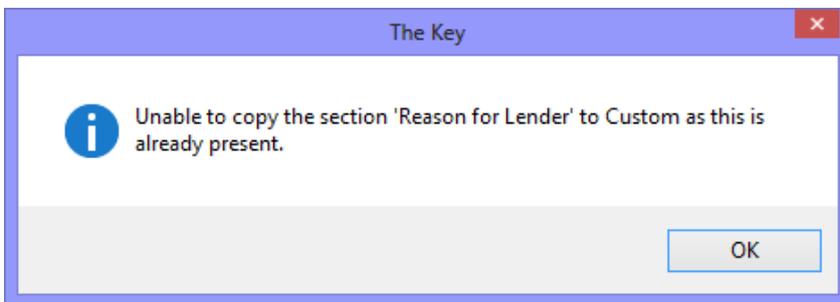

Figure 5: Warning Message

Once copied, the section will appear in the 'Custom' tab. In this tab, if a user right clicks on a paragraph then the options available are:

- Remove Section – This will remove the selected section from the Custom RWL
- Move Section Up – This will cause the selected section to move up the list. If the section is already first in the list this option will be disabled.
- Move Section Down – This will cause the selected section to move down the list. If the section is already last in the list this option will be disabled.
- Remove All From Custom – Removes all paragraphs from the custom tab

Completing the RWL in the Word Viewer

Once all paragraphs have been selected, and the Preview button clicked, the RWL opens in the Word Viewer for completion of 'blank text' items and any additional formatting.

All items requiring completion are now displayed across the bottom of the document to ensure that they are more prominent, they are also displayed within the document, e.g. [INSERT REQUIREMENTS]. This text is highlighted to ensure that it stands out more readily within the RWL.

To complete the items as highlighted in figure 6 below, click on the INSERT statements under the section 'Please select the following unanswered fields to fully complete the document' this will navigate you to the relevant statement within the document where you insert the required text.
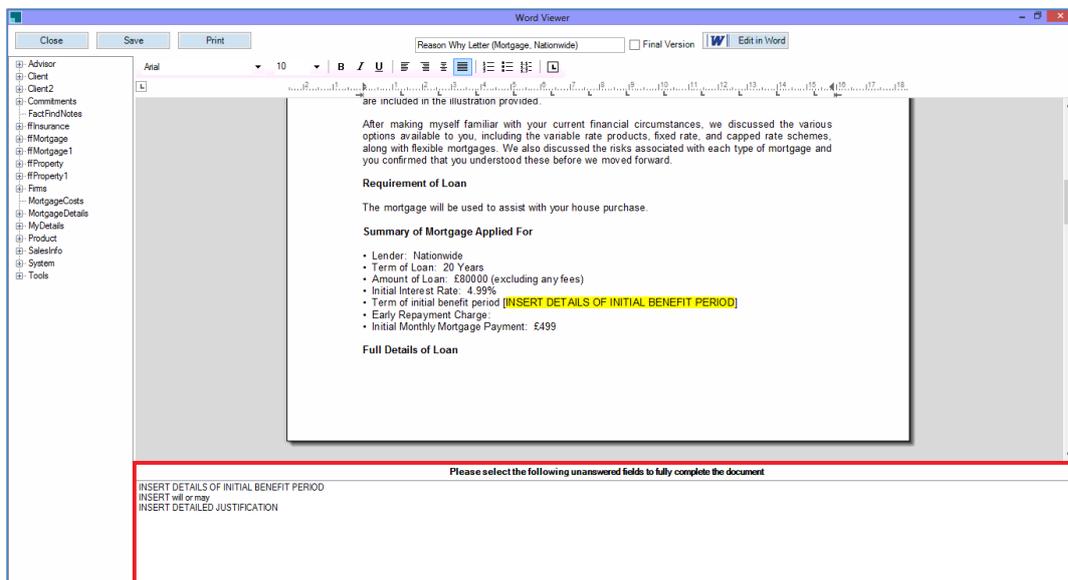

Figure 6: Word Viewer RWL Preview

Validation of manual entry items

A validation process exists to ensure that all mandatory items (as noted in the 'Please Complete' window) are completed prior to saving, printing or emailing the document if the RWL is to be saved in a PDF format. If being saved as a Word document it is possible to save without completing all items.

Once the Reasons Why Letter is complete click on the Save button then click on the Close button which will save the document back to the Client>Documents area with the Key.

Product Details Screen: Launching the RWL

This process assumes a single, and separate, RWL for each product recommended.

To create the Reasons Why Letter within the Product Details screen click on Client>Products and select the appropriate product. Click on the 'Open' button, as shown in figure 7 below.

Figure 7: Product Summary

When the Product Details (New Business) screen is displayed click on the Documents tab followed by the 'Create Reason Why Letter' button, as shown in figure 8 below.

Figure 8: Product Details - Documents

When the 'Create Reason Why Letter' screen is displayed, select the Product type required from the dropdown list. This will display the required paragraphs for the RWL as shown in figure 9 below.
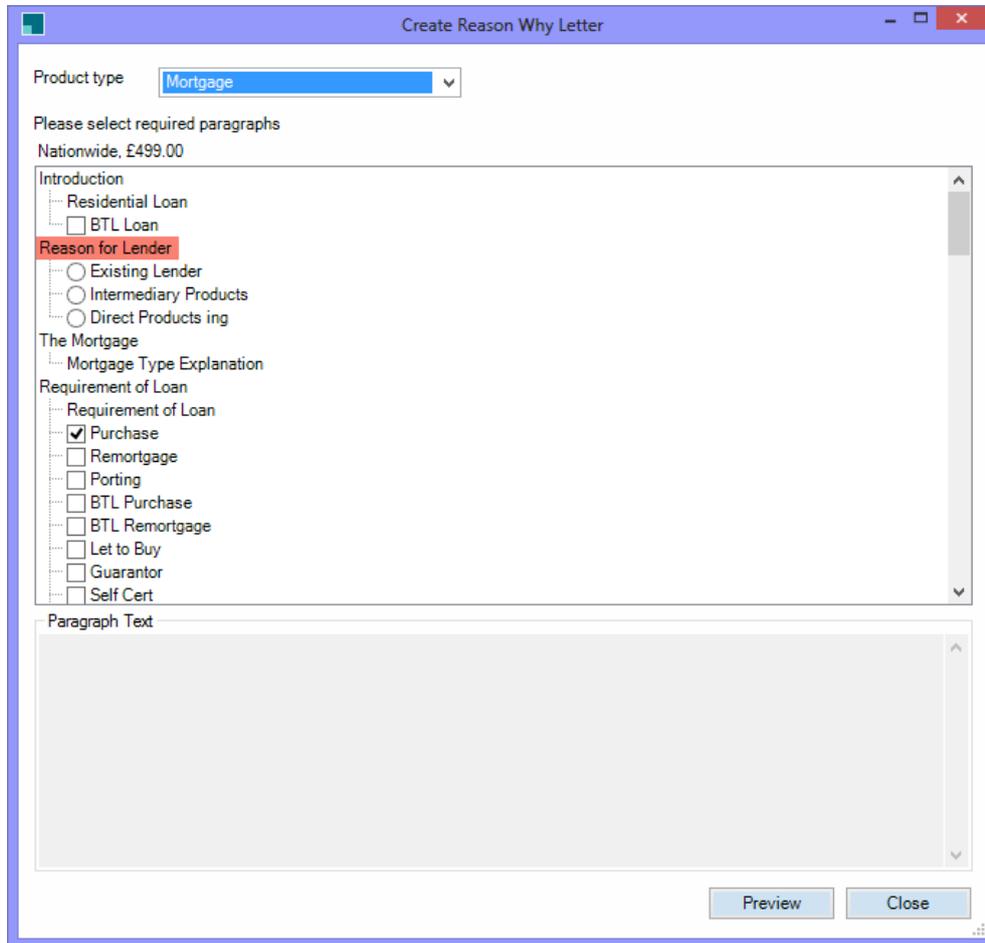
Completing the RWL in the Word Viewer

Once all paragraphs have been selected, and the 'Preview' button clicked, the RWL opens in the Word Viewer for completion of 'blank text' items and any additional formatting.

All items requiring completion are now displayed across the bottom of the document to ensure that they are more prominent, they are also displayed within the document, e.g. [INSERT REQUIREMENTS]. This text is highlighted to ensure that it stands out more readily within the RWL.

To complete the items highlighted in Figure 10 below, click on the INSERT statements under the section 'Please select the following unanswered fields to fully complete the document'. This will navigate you to the relevant statement within the document where the required text can be inserted.
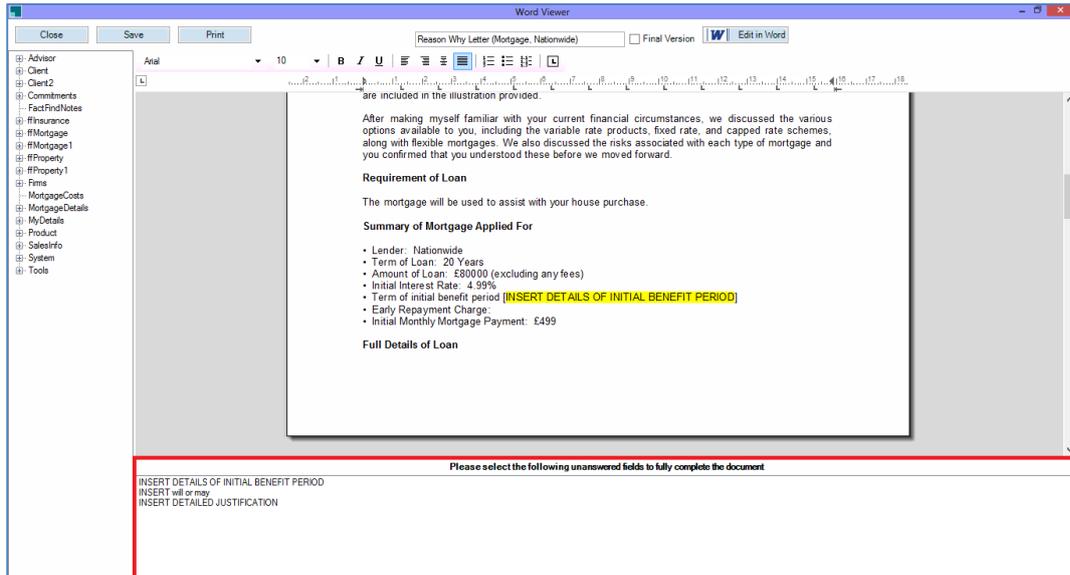
Figure 10: World Viewer RWL Preview

Validation of Manual Entry Items

A validation process exists to ensure that all mandatory items (as noted in the 'Please Complete' window) are completed prior to saving, printing or emailing the document if the RWL is to be saved in a PDF format. If being saved as a Word document it is possible to save without completing all items.

Once the Reasons Why Letter is complete click on the Save button then Click on the Close button which will save the document back to the Client>Documents area with the Key.

END