How To...
Manage Work Lists within the Key

Managing, Editing and Creating Work Lists

The Key uses work lists alongside the sales process in order to provide a 'to do' list that will drive the sale forward, and ensure that each associated individual is constantly reminded of outstanding actions. In addition, it forms a comprehensive audit trail of the actions carried out, including the date and time an action was completed.

The Key ships with a number of work lists to cover Mortgages, Term Life/CIC, Home Insurance and ASU/MPPI. All of these can be edited, or new work lists created to work alongside, e.g. a specific Mortgage – Buy To Let work list may be created to work alongside the 'standard' Mortgage work list.

As well as providing a 'to do' list of actions pertaining to a sale, the work list can control the status of the sale itself, automatically moving the sale along from, for example, Enquiry to Submitted to Offered.

Editing an Existing Work List

The ability to edit a work list is controlled by the user's own setup permissions. For example, if a user is restricted to a particular branch, they will only be able to edit work lists associated with that branch.

To edit an existing work list:

- Click on Setup>Workflow in the left navigation menu. Ensure that the Work Lists tab is selected. The following screen will be displayed:

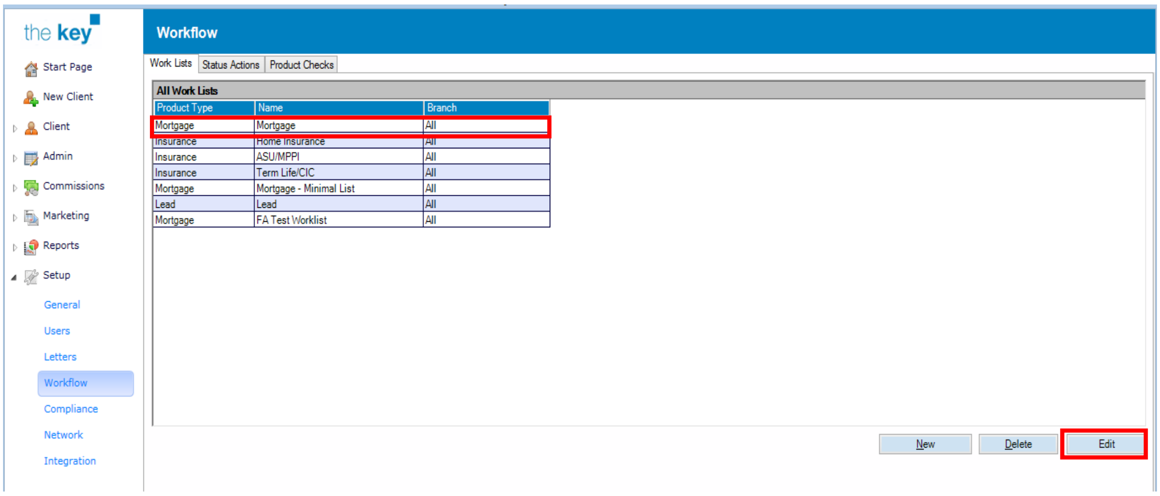

Figure 1: Setup>Workflow>Work Lists

- Select the specific work list to be edited, and click on the Edit button. The following screen will be displayed:

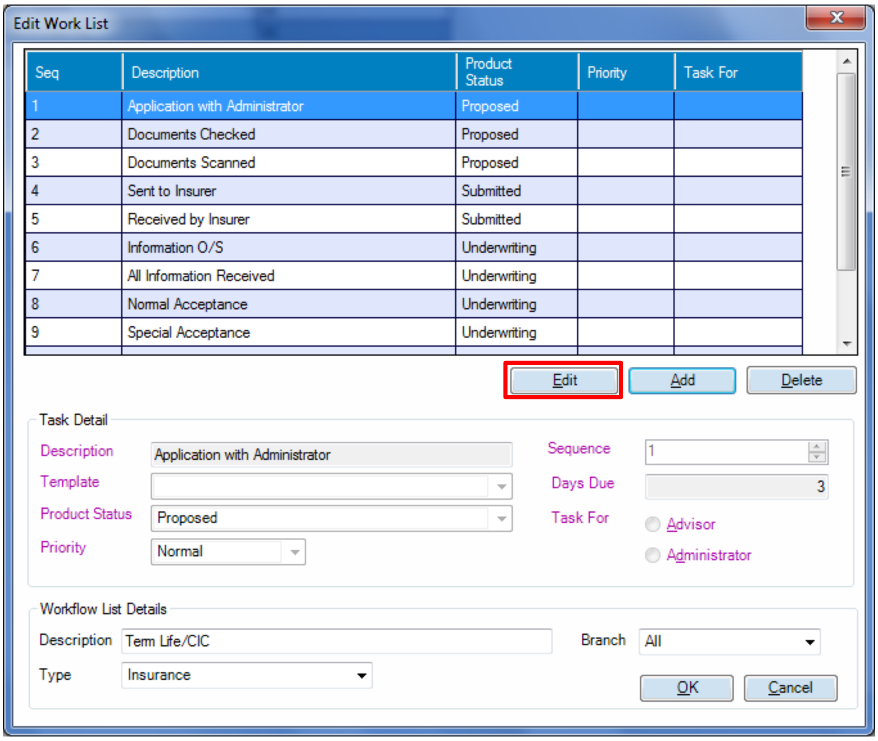

Figure 2: Edit Work List

- This screen will list all the element of the selected work list, as well as any associated status, priority etc.
- To edit an existing entry, highlight it and click on the Edit button. Amend the information within the Task Detail area as shown below:

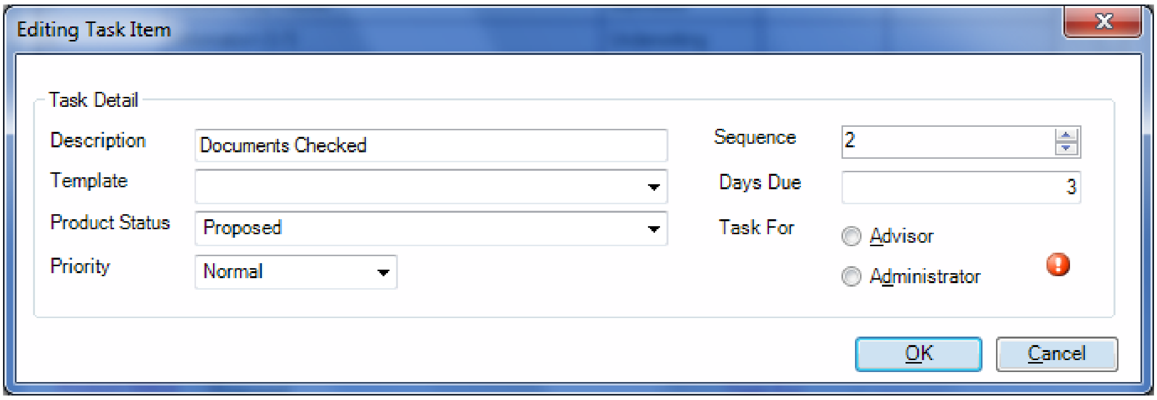

Figure 3: Editing Task Items

- Additional options within the Task Detail include:
    - Template: this associates a document with a work list item, e.g. a client letter. This document must have already been added to The Key to be available.
    - Product Status: when this work list item becomes active, this is the product status that will be associated.
    - Priority: when a work list item becomes due a task is created. This dropdown enables the task to be marked as high, low or normal priority.
    - Sequence: this indicates where in the overall work list the item should be ranked.

- Days due: if the item is not to become due as soon as it become active (i.e. when the preceding task is completed), how many days in the future should it be set for.
- Task for: by default the responsibility to a work list item will remain with the individual who completed the preceding item. However, to override this select either the advisor or administrator.

- To add a new item to the work list click on the Add button in the 'Edit Task List' window and enter the information required in the Task Detail area.

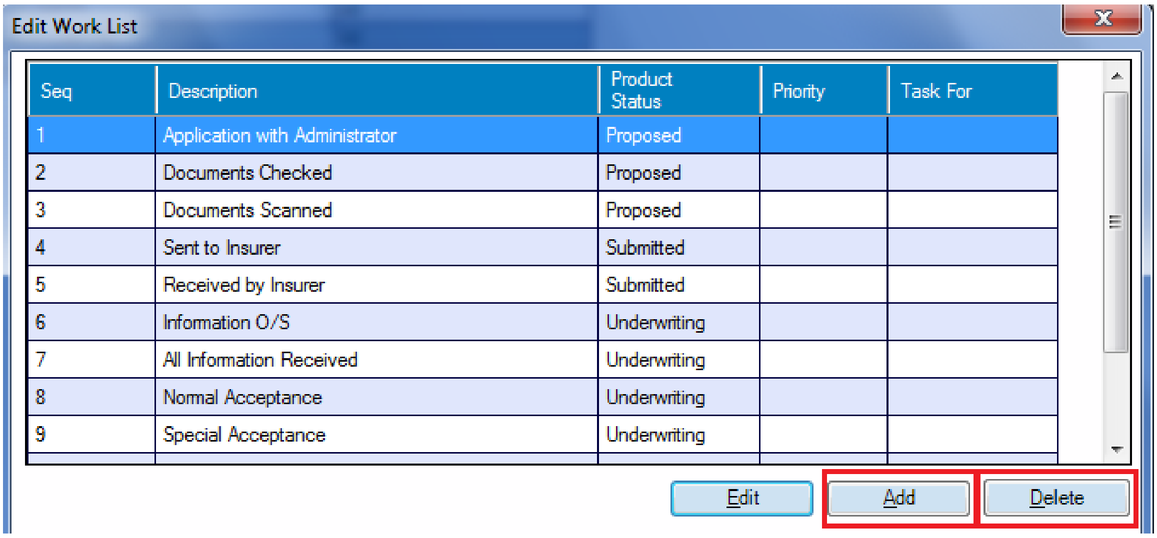

Figure 4: Adding and Deleting in the Edit Work List Window

- To delete an entry in the work list, highlight the relevant entry and click on the Delete button.
- Once all entries have been completed click OK to save changes and close the window.

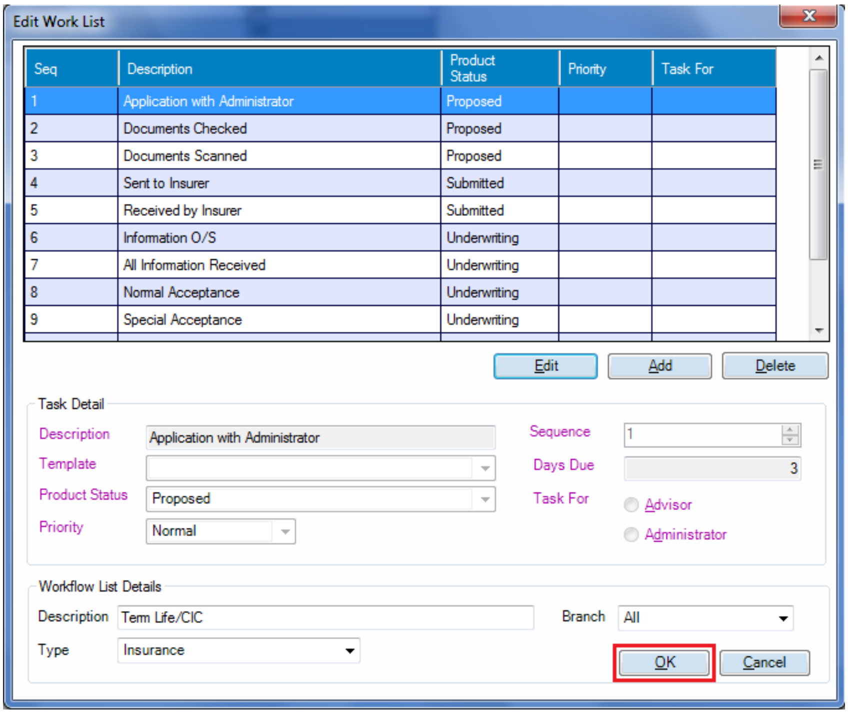

Figure 5: Edit Work List - Saving Changes

Creating a New Work List

To create a new work list:

- Click on Setup>Workflow in the left navigation menu. Ensure that the Work List tab is selected. The following screen will be displayed:

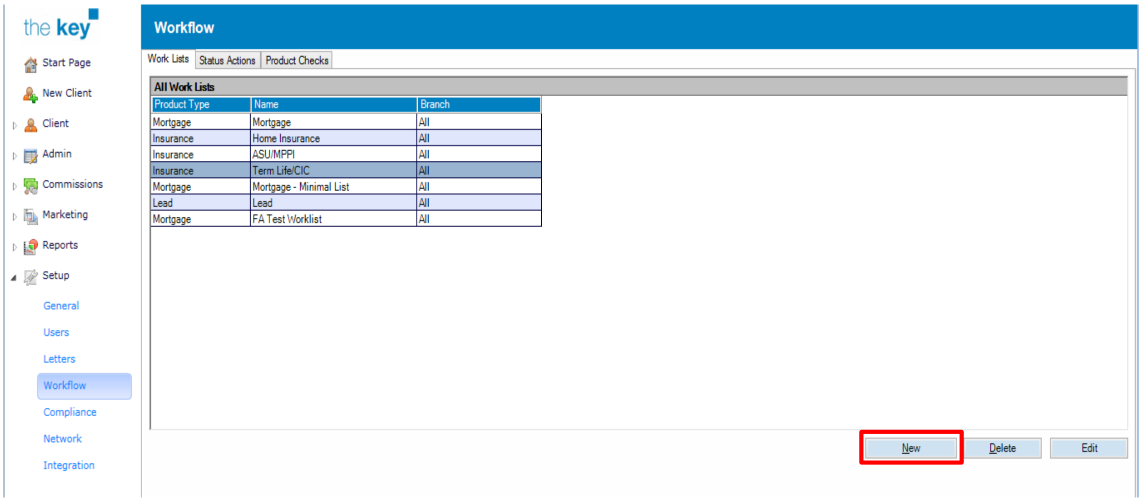

Figure 6: Creating a New Work List

- Click on the 'New' button to open a blank 'Add Work List' window as shown below:

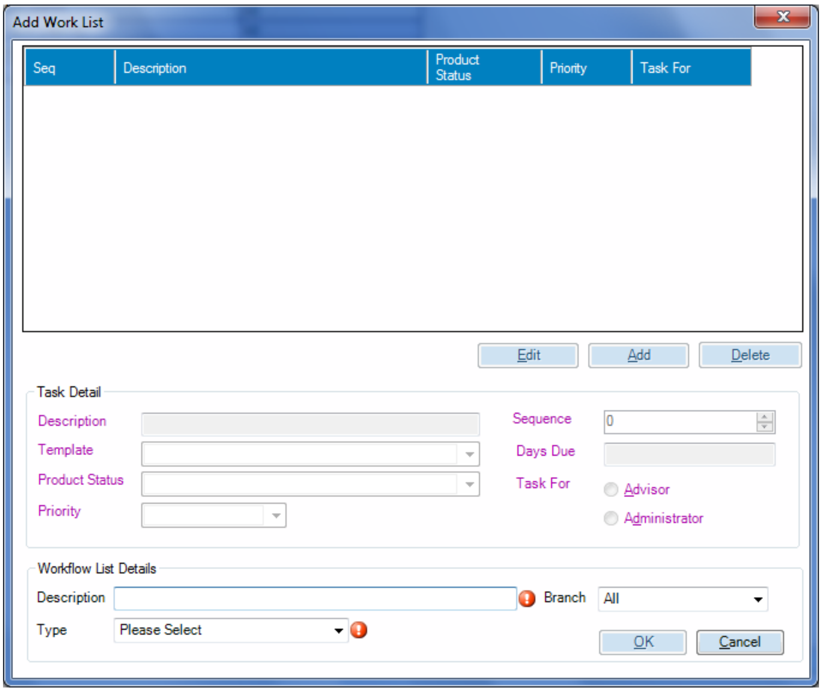

Figure 7: Add Work List

- Enter a description for the new work list, e.g. Mortgage – BTL.
- Confirm the product type the work list is to be associated with from the dropdown list. Select from Mortgage, Insurance, Investment, Loan, Other.

- Select whether this work list is to be available to all branches, or restricted to that selected in the dropdown. The availability of this option depends on the user's own permissions as noted above
- Complete the specific entries for the work list as noted above in amending a work list.

Deleting Work Lists

Prior to deleting a work list confirm that it is no longer required. It is not possible to 'restore' a work list, and if deleted in error would need to be recreated 'from scratch'.

- Select Setup>Workflow in the left navigation menu. Ensure that the 'Work List' tab is selected. The following screen will be displayed:

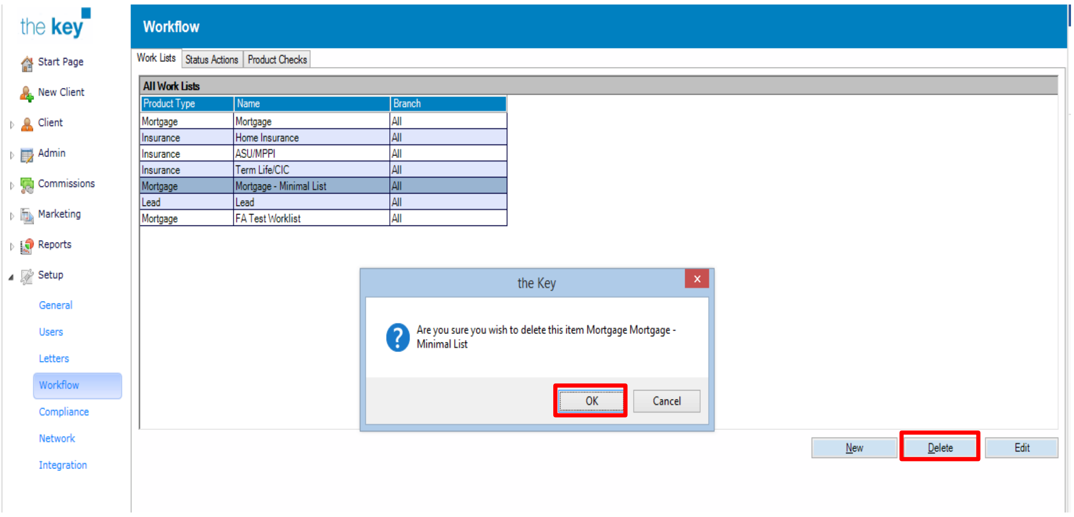

Figure 8: Deleting a Work List

- Select (highlight) the work list to be deleted.

Click the 'Delete' button. Select OK when asked to confirm the deletion.

Setting Default Work Lists for Products

The Key allows a default work list to be associated with a Mortgage, Term/CIC, Home Insurance or ASU/MPPI product. The work list is created when an application date is entered for the specific product.

The default lists are maintained within Setup>General>Sales Process, as shown below.

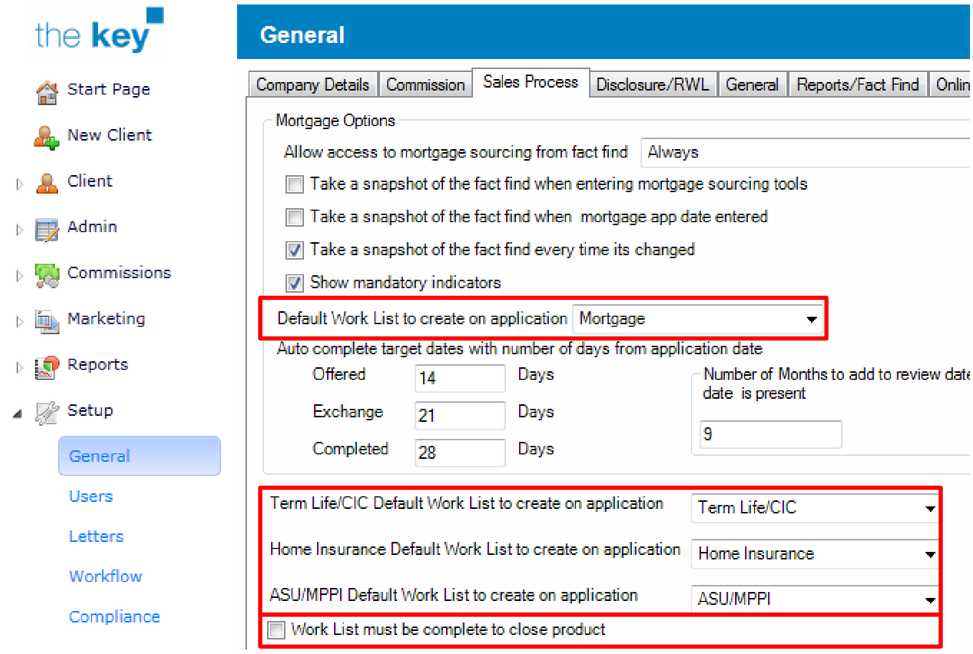

Figure 9: Setting Default Work Lists

For each product type, select the default list to appear when an adviser enters an application date for that particular product type.

This screen also offers the option to force users to complete a work list before they can close off a product. Place a tick in the associated checkbox to enable this functionality.

Manually Associating a Work List with a Product

A work list can also be manually associated with a product be selecting Product Details>Work List.

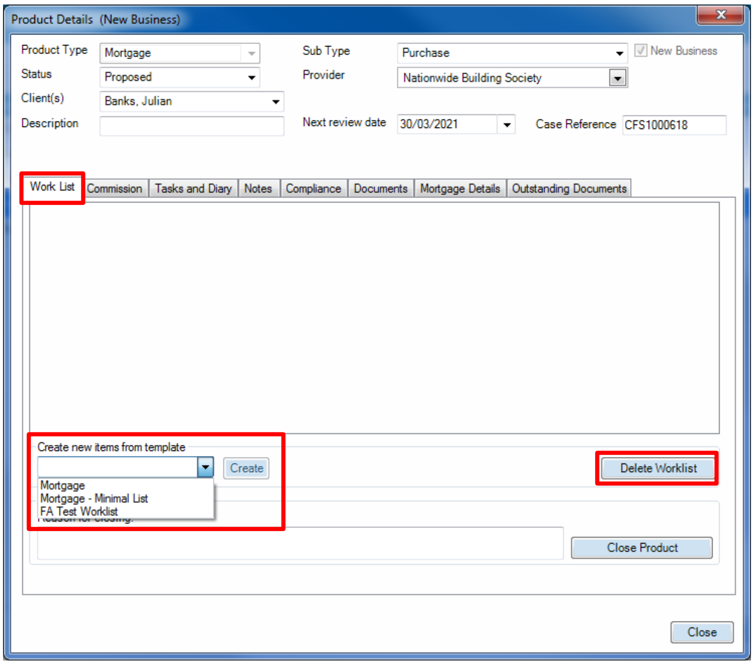

Figure 10: Manually Adding a Work List

From the dropdown select the appropriate work list, and click on 'Create'.

Note that this screen also offers the ability to delete a work list (e.g. if one has been added in error), although this is restricted to users who hold the appropriate permission.

END