How To...
Use and Interpret the Client Admin Menu

The client admin menu provides a number of tabs in which it is possible to review client information such as associated advisor, change history and contact history. It also provides the ability to create client specific tasks (as opposed to those tasks associated with a product and/or sale).

Reviewing Client Data

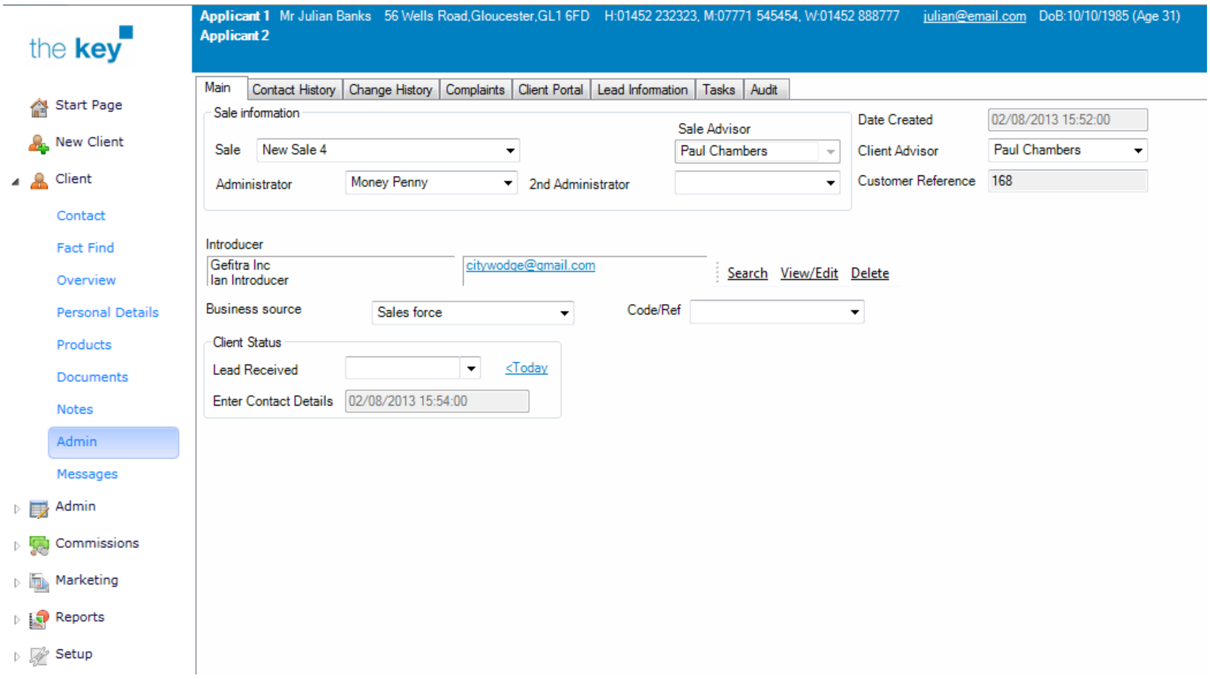

Figure 1: Main Client Admin Screen

The Main tab confirms the data that was entered at the time of client creation. The screen will also display the administrator and second administrator for each sale as it is selected.

If the lead was received prior to the entry of the client, for example through another system, it is possible to add the date received here.

Greyed out data fields, such as date created and customer reference, cannot be amended.

Contact History

Contact History forms an optional area to record all client contact in a separate file. There are other options for recording client contact, e.g. the notes area, but this functionality offers a more structured approach.

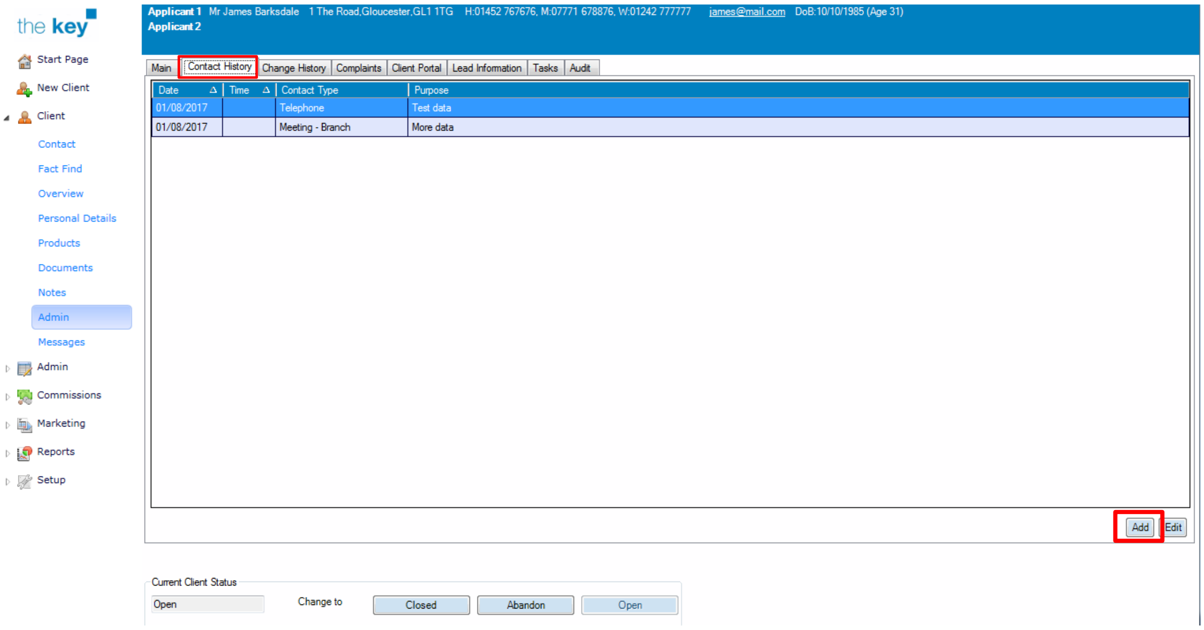

Figure 2: Editing Contact History

To add a contact record:

- Click Add in the Contact History tab. The following window is displayed:

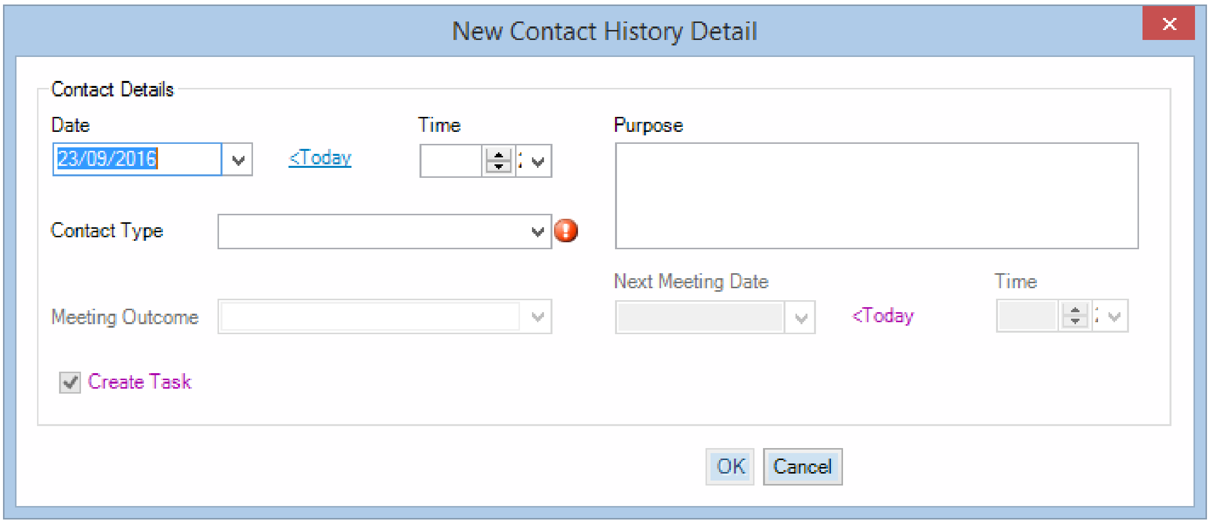

Figure 3: Contact History Details

- Complete the contact details. Click the OK button to save.
- The details of the contact are added to the contact history.

Each item can be reviewed by highlighting it in the list and clicking on Edit.

Change History

This screen summarises the changes made to the client file.

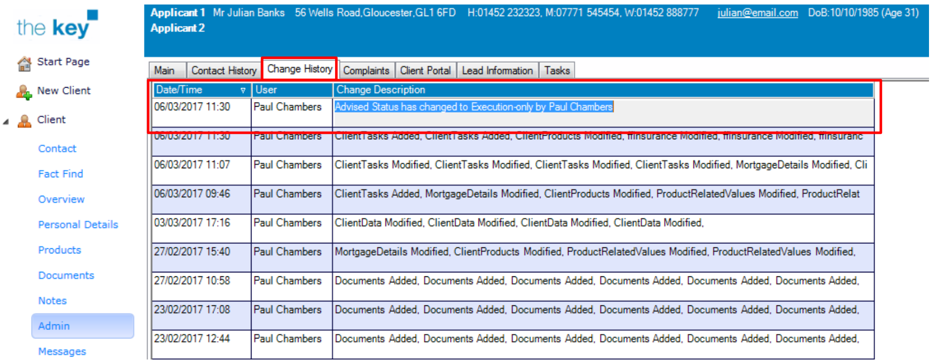

Figure 4: Client Change History Screen

No changes are made directly to this screen, but it does detail the user and date/time of all changes, along with a description of the system areas concerned.

Complaints

Any complaints associated from the client can be identified from the Complaints tab.

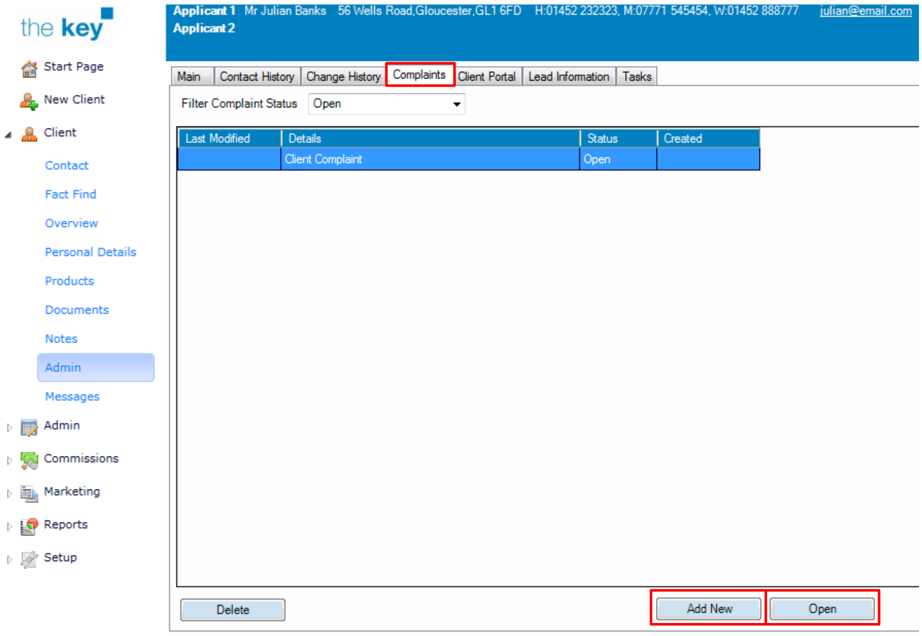

Figure 5: Client Complaints Screen

- To record a complaint click on the ‘Add New’ button.
- Complete the following screen. Note: details on complaint recording and management are to be found in the relevant compliance documentation.

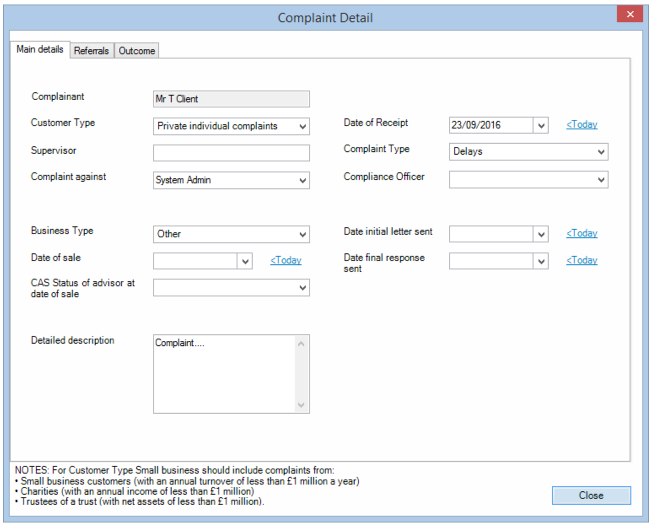

Figure 6: Complaint Detail

- To review any complaints recorded, highlight the appropriate complaint and click on 'Open'

Client Portal

The Key incorporates functionality that allows the client to access their account online, including sending and receiving secure online messages, as well as exchanging documentation through a secure medium. To enable access for a client, go to Client > Admin > Client Portal.

Single Client

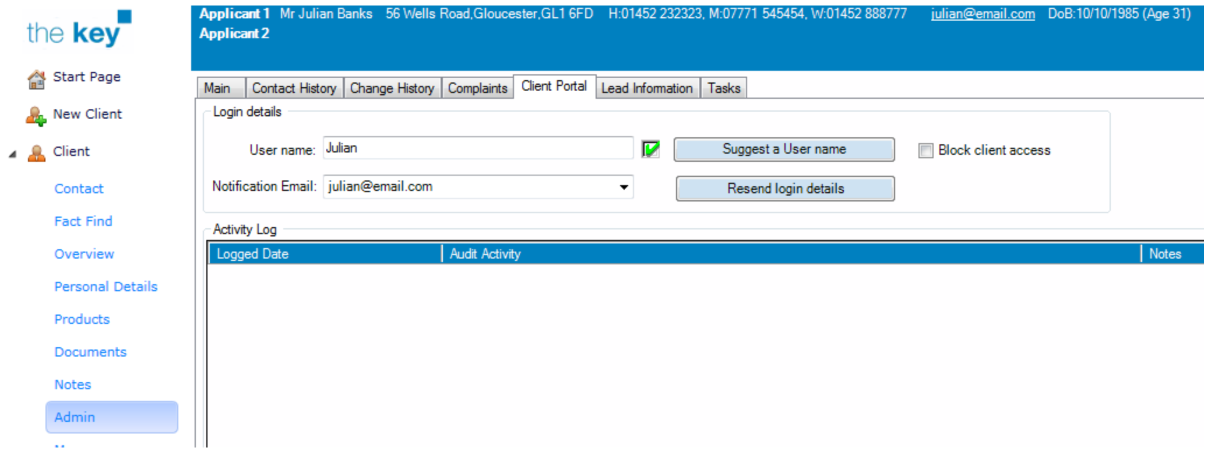

Figure 7: Client Portal Access Settings

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.

Two Applicants

Individual login credentials can be sent where there is more than one applicant.

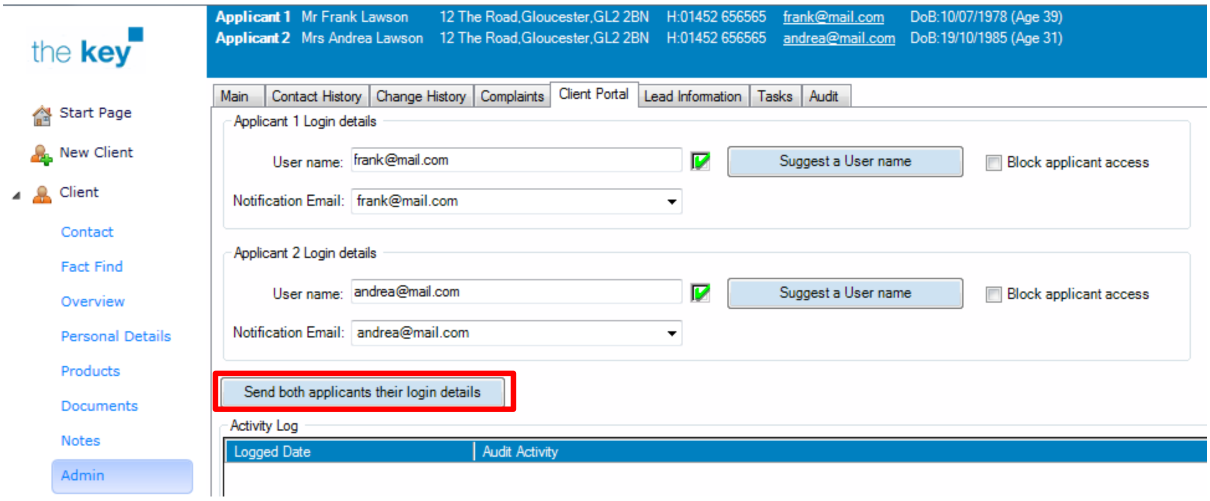

Figure 8: Two Applicant Login Details

In this case, the details for both applicants are recorded and the 'Send both applicants their login details' button is selected.

Accessing the Portal

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.

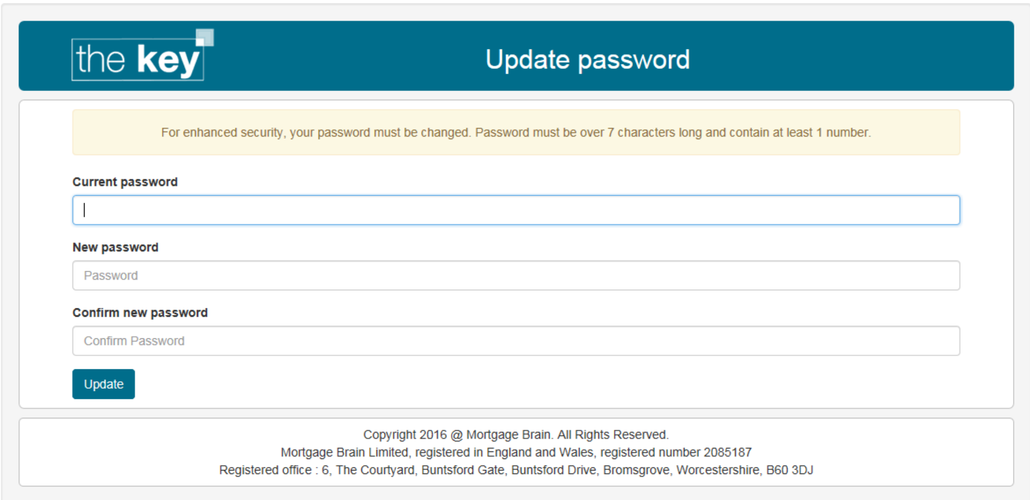

Figure 9: Client Online Login Screen

After logging in, the client will see the portal's home page.

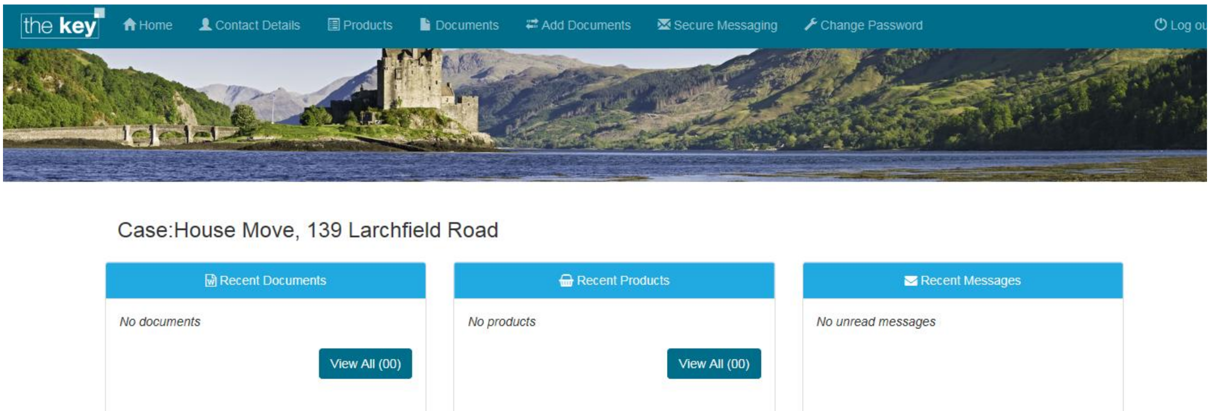

Figure 10: Client Portal Home Screen

If the client has multiple sales, they can be selected from the dropdown that will appear on the home page.

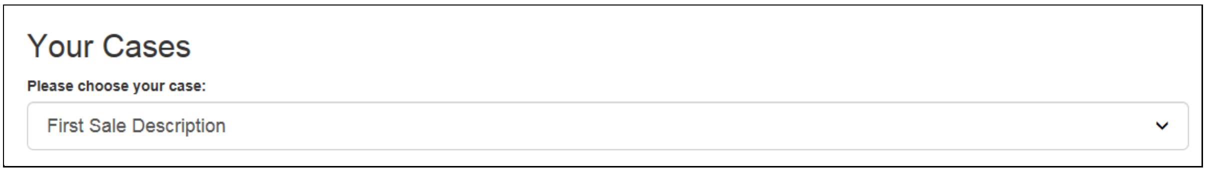

Figure 11: Selecting the Sale

Any changes that the client makes to this screen are saved directly into the Key database.

Lead Information

If leads have been purchased, the Key offers the ability to record the costs associated with the purchase, and whether any refund has been obtained for 'dead' leads.

- Open the Client>Admin>Lead Information tab. The following screen is displayed:

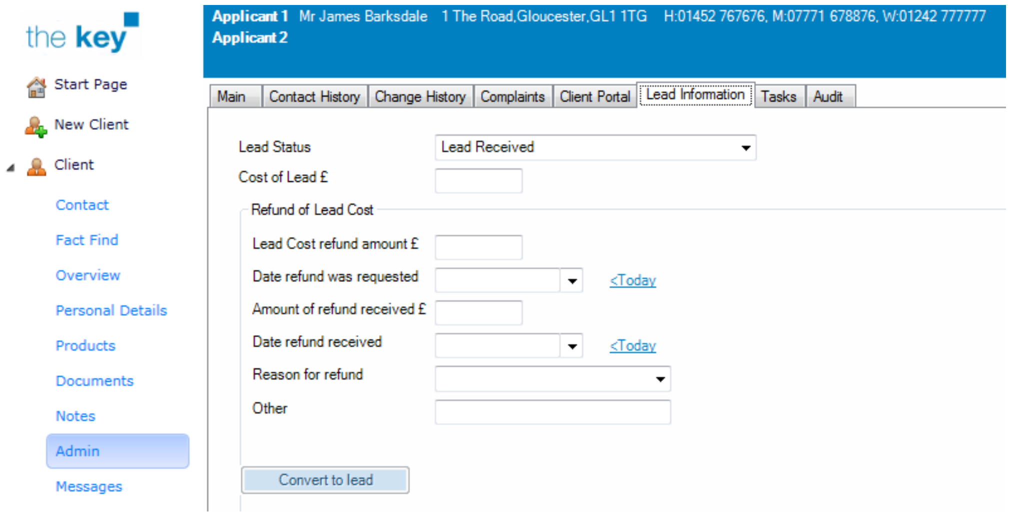

Figure 12: Client Lead Information

- Complete the information as required for the cost of the lead.

- If recording a refund of lead cost, complete the details as to the refund amount and reason.

This tab also offers the ability to convert a client record back into a lead. However, this is only possible if no client activity has taken place (e.g. no disclosure documentation issued etc.).

Client Specific Tasks

The Key provides a comprehensive task management system to ensure a record of all activity to be carried out associated with a client and/or sales process. The majority of these tasks are associated with specific products, but it is also possible to record a task against a client file.

- Open the Client>Admin>Tasks tab. The following screen is displayed:

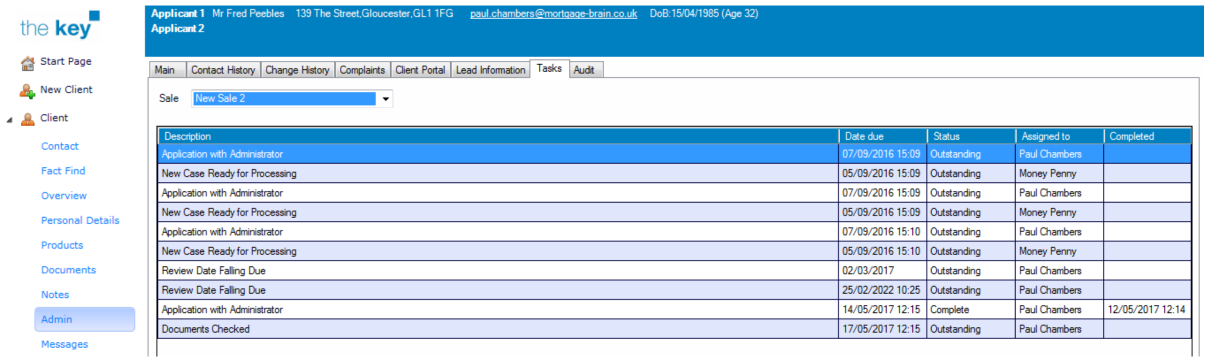

Figure 13: Client Task Summary Screen

- To add a task, click the 'New' button. The task dialogue window is displayed:

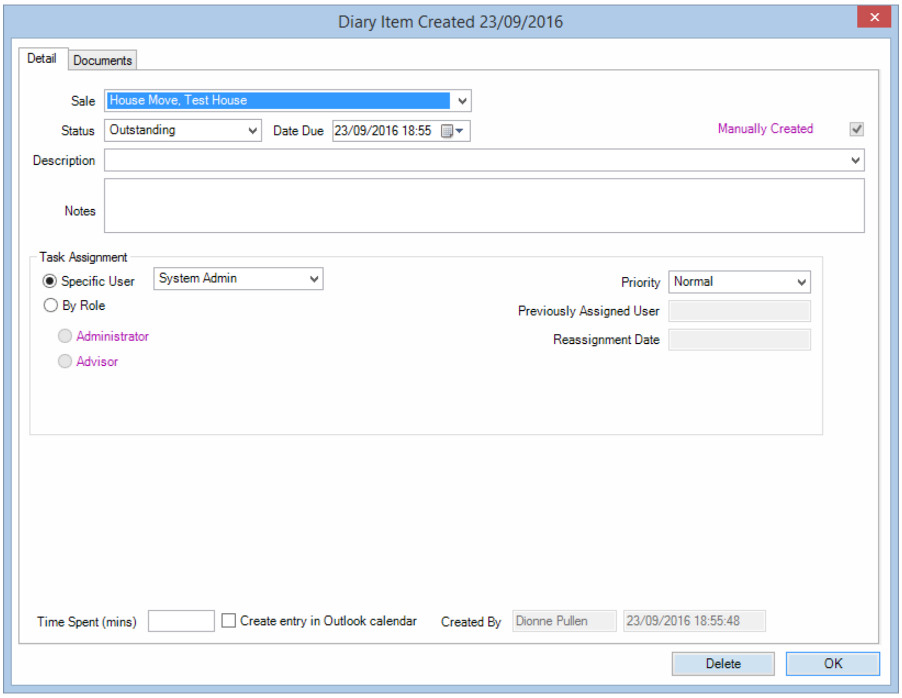

Figure 14: New Client Task Screen

- The item will default to an outstanding task, due immediately. The due date can be changed by entering a new date directly, or selecting a new data using the calendar functionality (accessible from the drop down arrow next to the date).
- Use the drop down next to Description to select the task item. If the item required is not present, a new item can be typed directly into the field.
- In the Notes field, free text can be entered to provide a more detailed description of the task.
- By default, the Key will assign the task to the current user. A different user can be selected from the drop down list.
- If necessary, the time spent on the task can be recorded. This can help provide a record of the time spent on a client file for billing purposes.
- The checkbox ‘Create entry in Outlook calendar’ will create an entry in that user’s Outlook calendar for this task (as long as the integration with Outlook has been setup in the Key).
- The Key will assign a normal priority for the task by default. This can be amended to High or Low using the drop down.
- Once all required fields have been completed, click the Close button.

Once saved, the task will appear in the list within Client>Admin>Tasks, and if outstanding will also be viewed on the Start page and within the user’s list in Admin>Diary/Tasks.

The task can be opened to be edited/completed by selecting it from the list and clicking on ‘Open’.

Audit

The Audit tab will detail any changes to the fact find that have been made online by the client.

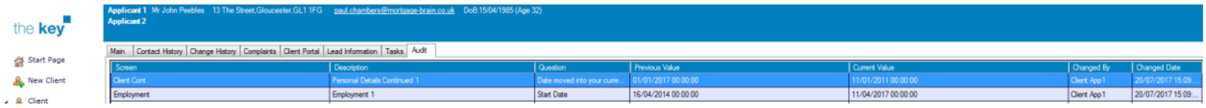

Figure 15: Audit Tab

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