Online FactFind Training Manual

Contents

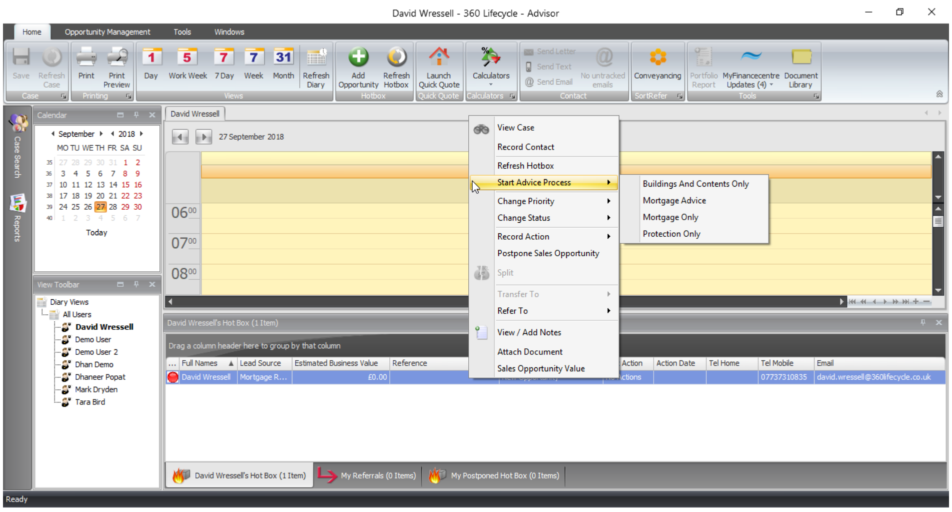
1.0 INTRODUCTION

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.

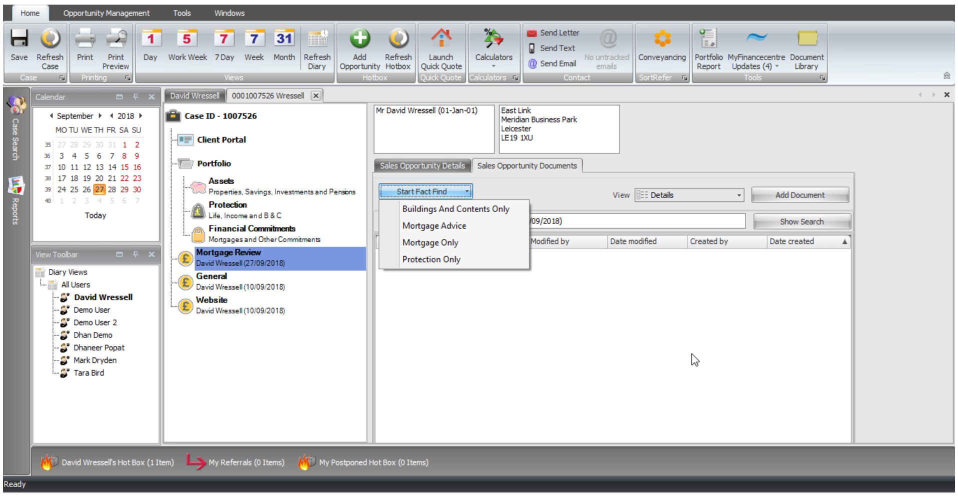
360 Lifecycle Online FactFind offers you the option to 'Invite Client' so your clients can complete, or part complete FactFind at any stage and potentially in advance of any appointment. 360 Online FactFind can be accessed from any web enabled device, thus allowing you to be in control and having access 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

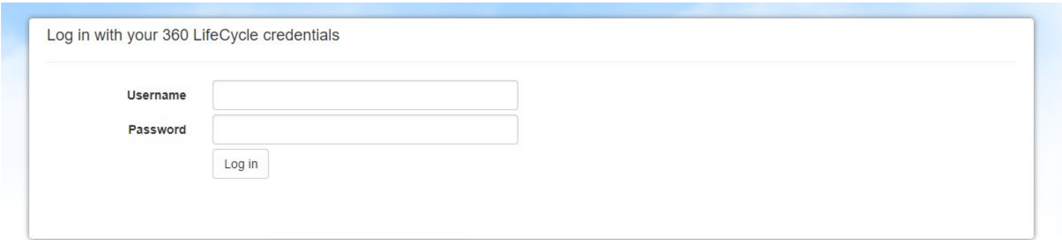
Online FactFind can be launched or accessed in one of three ways;



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



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



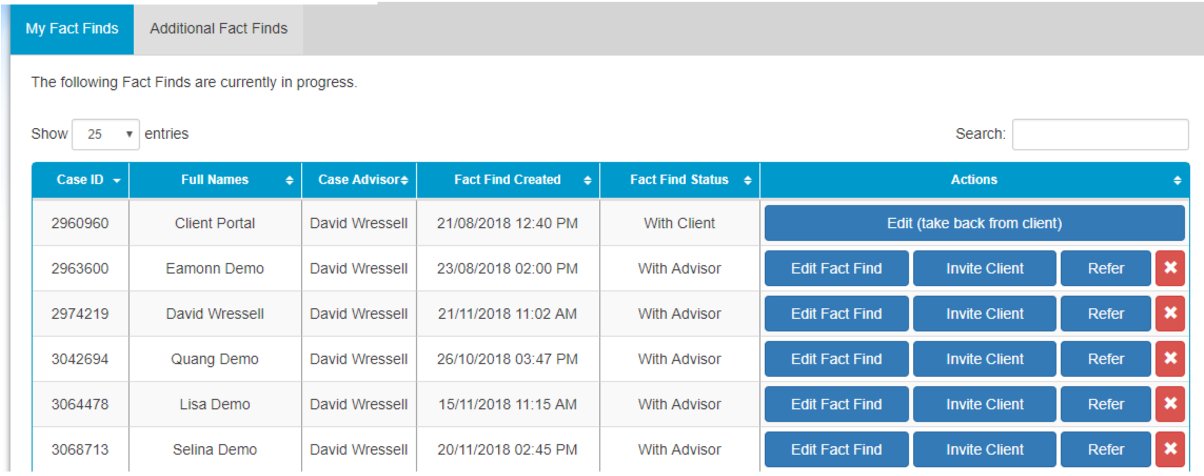
3. By entering the Online FactFind URL directly into your Internet Browser e.g. https://factfind.360lifecycle.co.uk/ and entering your 360 username and password.

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.

In Progress FactFinds

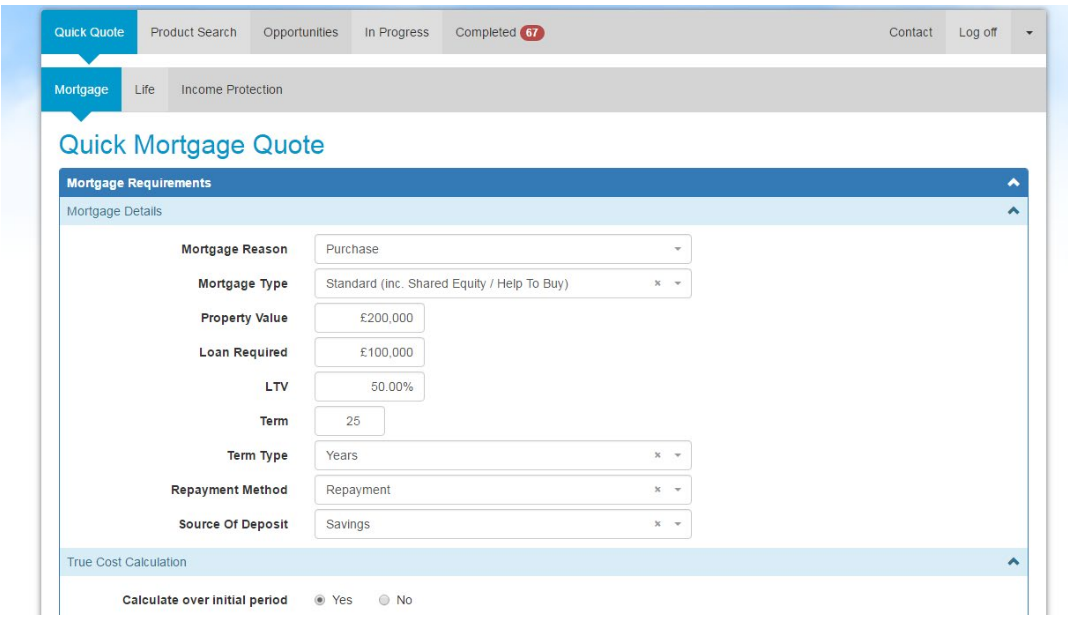


Case ID	Full Names	Case Advisor	Fact Find Created	Fact Find Status	Actions
2960960	Client Portal	David Wressell	21/08/2018 12:40 PM	With Client	Edit (take back from client)
2963600	Eamonn Demo	David Wressell	23/08/2018 02:00 PM	With Advisor	Edit Fact Find / Invite Client / Refer
2974219	David Wressell	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

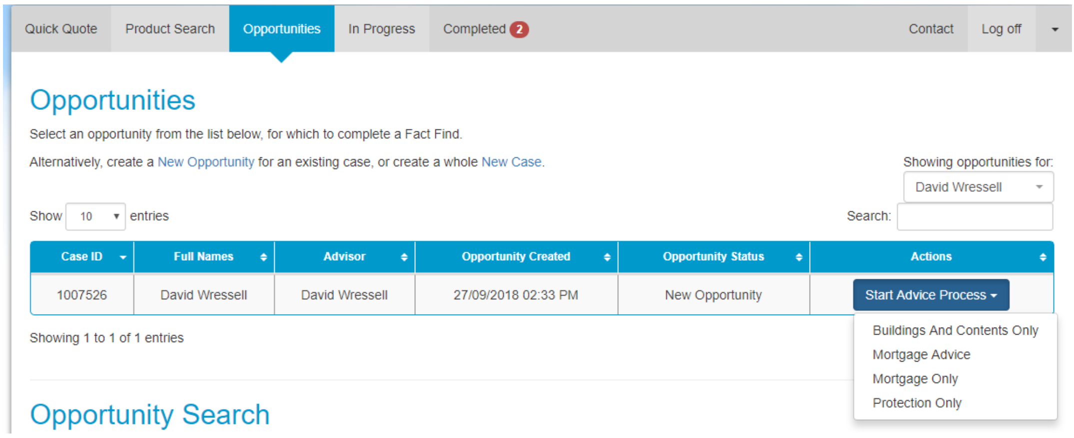
These Menu Options are always available throughout 360 FactFind and can be accessed at any point.

- 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.



3.2.1 Opportunities

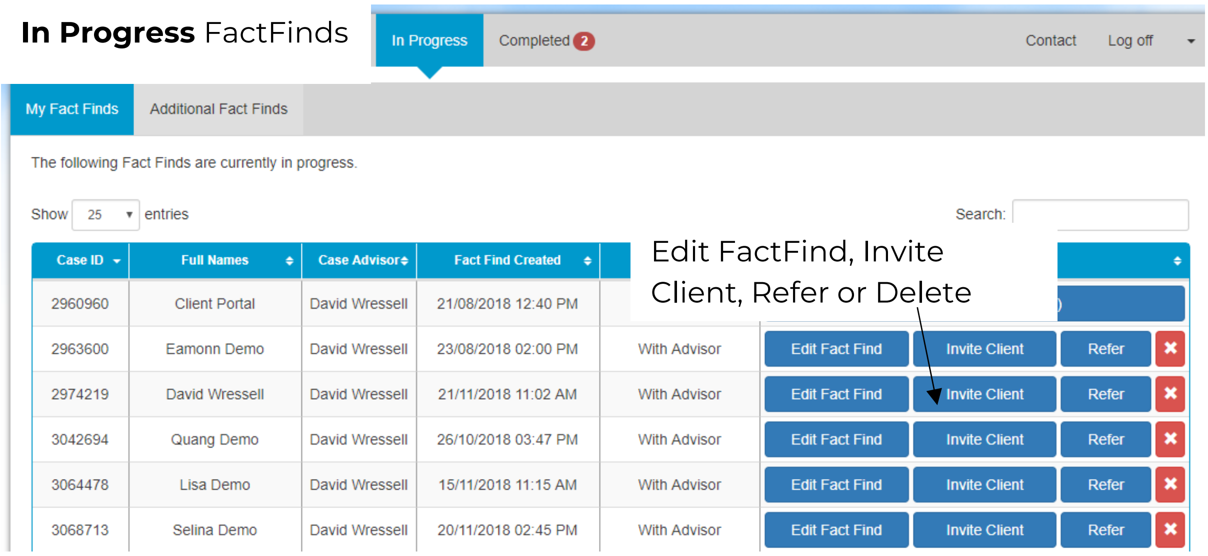
The Opportunities landing screen will display active sale opportunities for which a FactFind has yet to be launched from. As 360 FactFind can only be launched against a current sale opportunity and case record, from here you can also create **a 'New Opportunity'** for an existing client / case or you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



3.2.2 In Progress

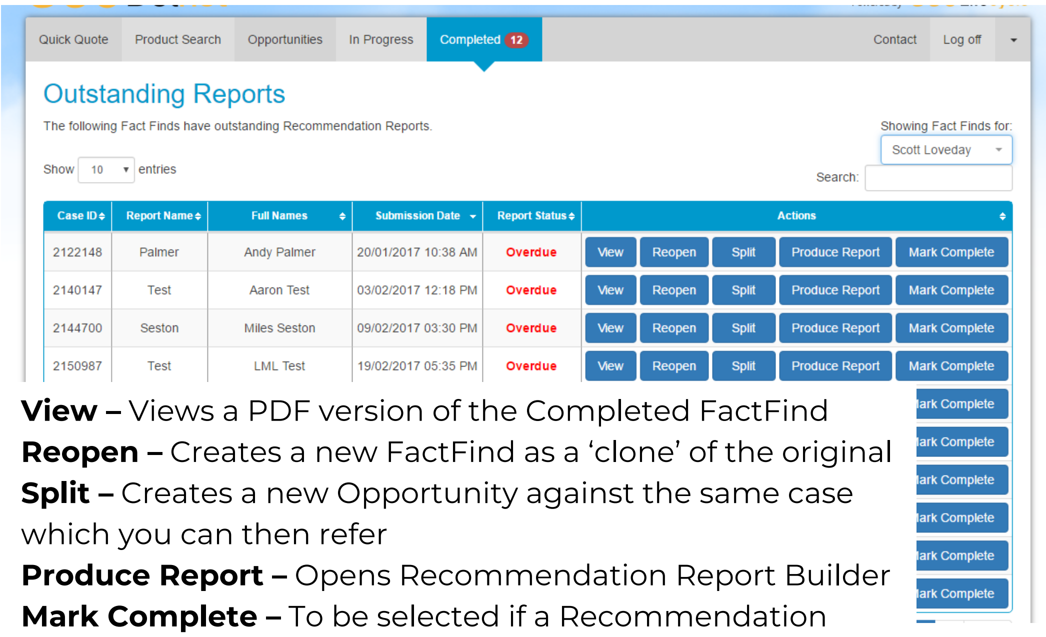
This is the landing screen if you log into FactFind directly from your Internet Browser. 'In Progress' lists all FactFinds which have been created and have yet to be Completed or Cancelled. From here you can either **'Edit FactFind'** to enter the sales process for that particular case, **'Invite Client'**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



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.

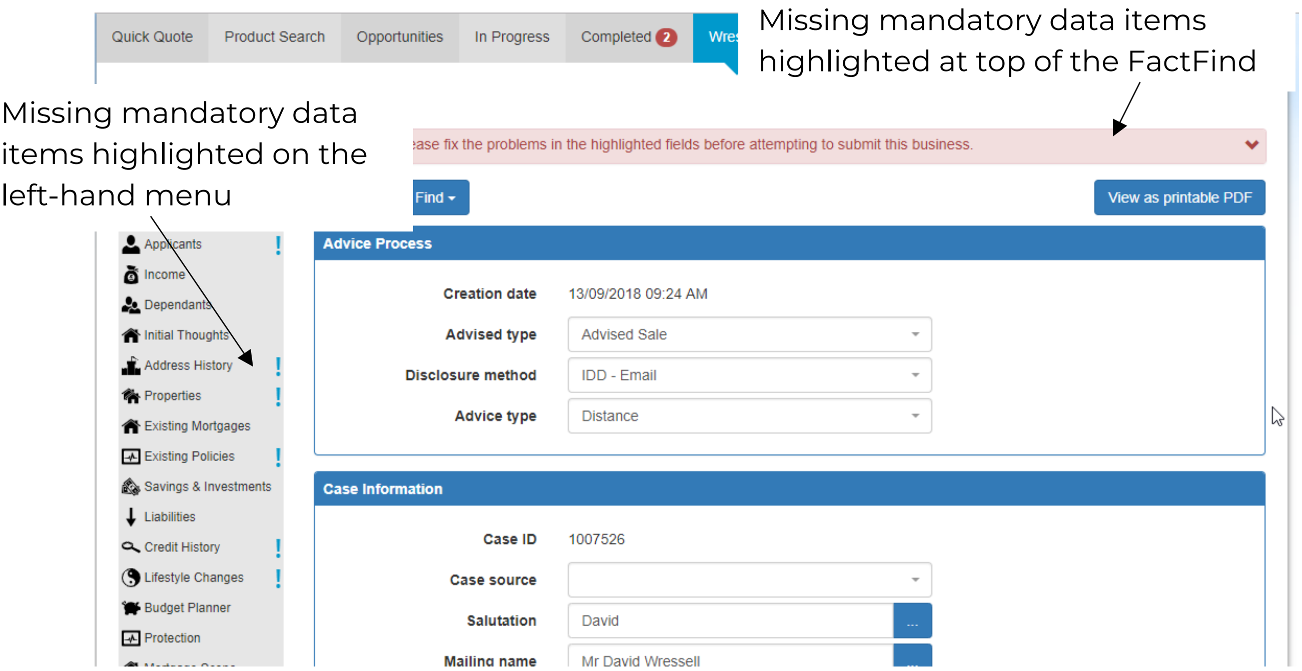


View – Views a PDF version of the Completed FactFind
Reopen – Creates a new FactFind as a 'clone' of the original
Split – Creates a new Opportunity against the same case which you can then refer
Produce Report – Opens Recommendation Report Builder
Mark Complete – To be selected if a Recommendation Report is not required or completed 'Offline'

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 left-hand menu.



The 'Advisor View' of the FactFind 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. 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.

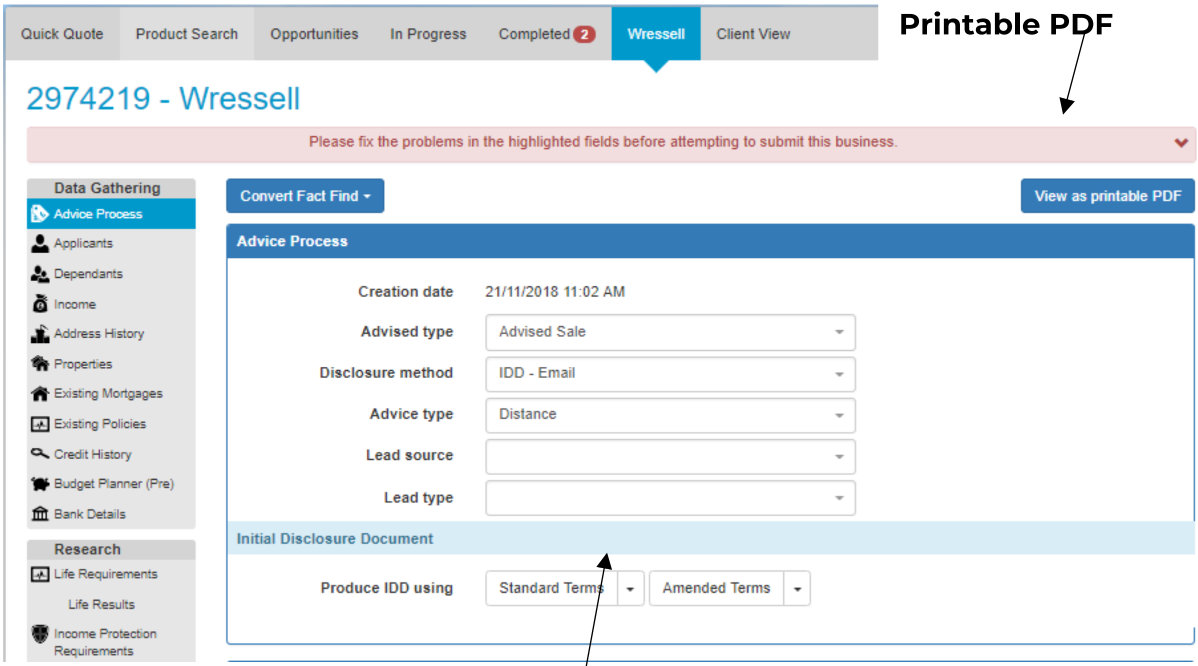
NOTE; if you convert to a FactFind version that removes pages, this information

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.

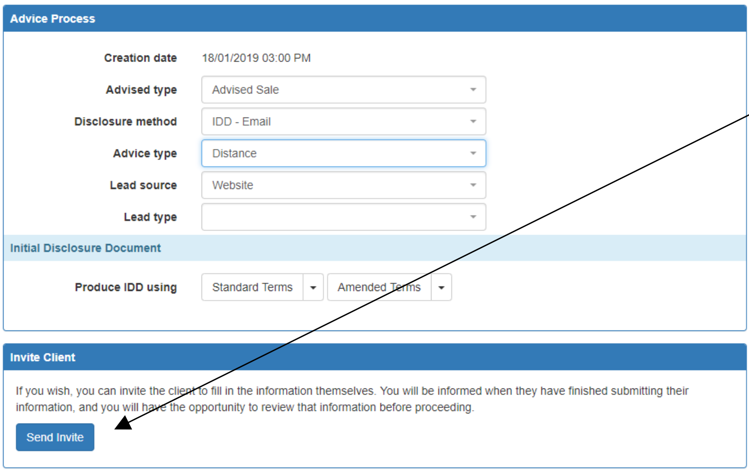
View FactFind as a **Printable PDF**



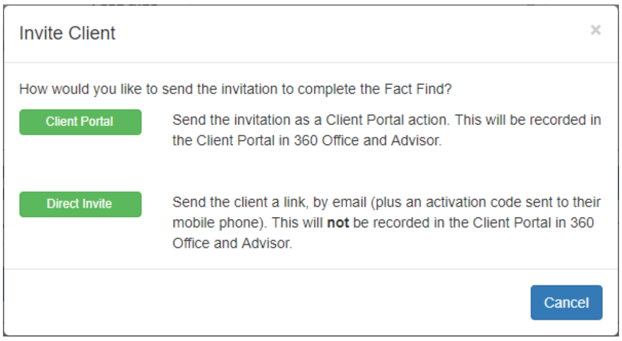
Produce IDD in Standard or Amended Terms and for Regulated or Unregulated business. Once produced you can then, View or Email directly to your client. Please note your default IDD Settings need to be entered should you wish to **Produce IDD.**

3.2.1 Send Invite

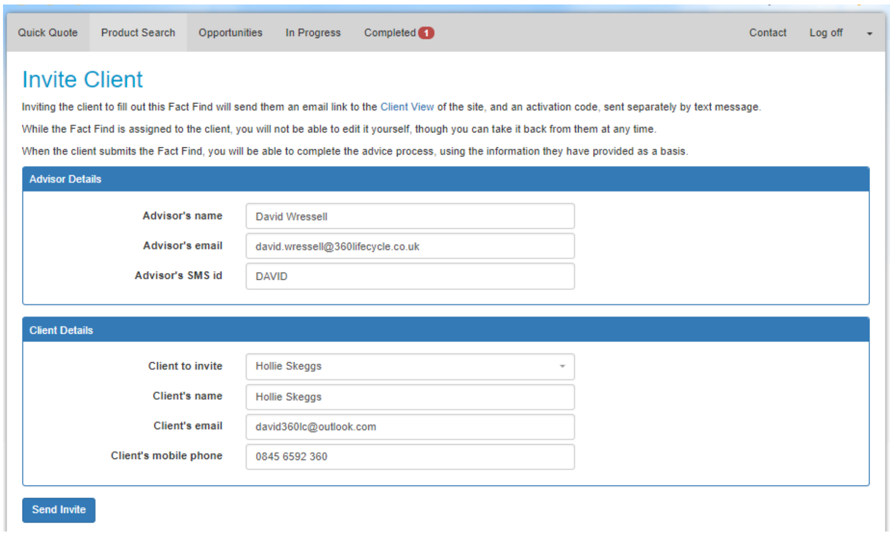
360 FactFind provides you with an opportunity to send the FactFind to your client for full or part completion. Clients can also upload documentation as part of this process. You can **Send Invite** from either the FactFind ‘Sales Process’ or ‘In Progress’ screens and can do this directly or via the Client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



Send Invite can be used at any point within the sales process.

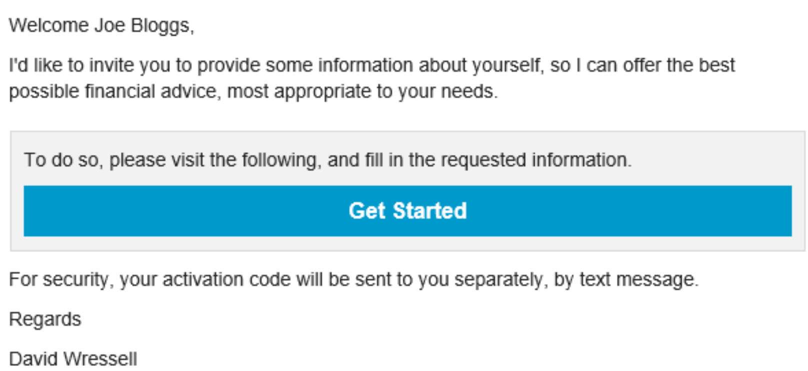


When choosing 'Direct Invite' you will have the opportunity to check and edit any details before sending to the client.



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.


Welcome Joe Bloggs,

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.

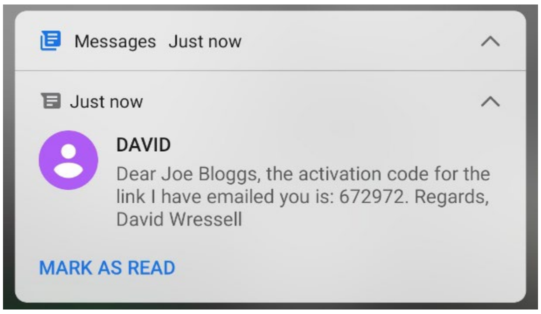
To do so, please visit the following, and fill in the requested information.

Get Started

For security, your activation code will be sent to you separately, by text message.

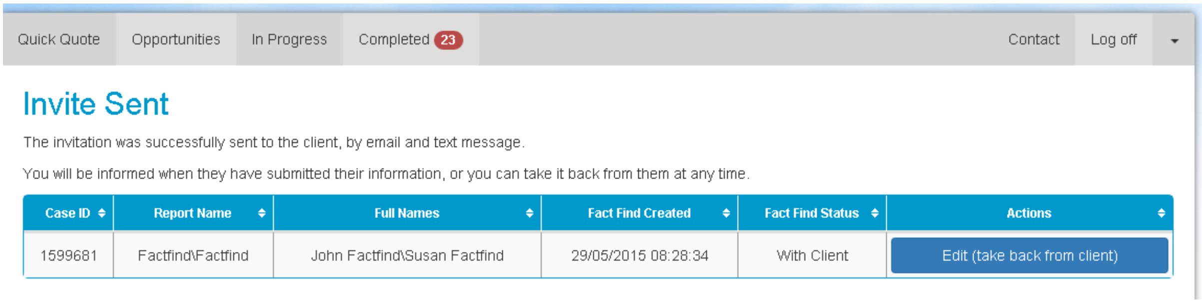
Regards

David Wressell



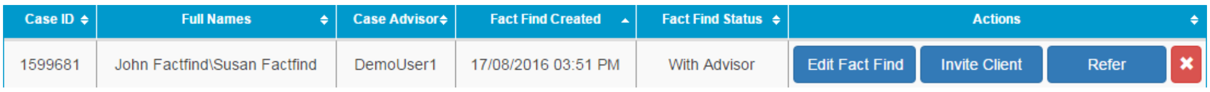
Once the client invite has been sent you will notice the ability to 'Edit FactFind', 'Invite Client', 'Refer' or Delete / Cancel the sales process has been removed. These options would have been replaced with **'Edit (take back from client)'**. The FactFind Status will also show as 'With Client'.

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.

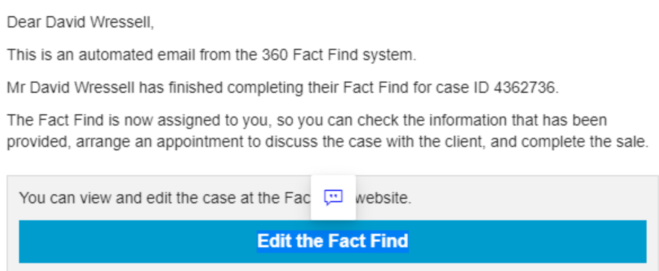


You can regain ownership of the FactFind at any time by choosing **Edit (take back from client)** This Action will also be displayed against 'In Progress' FactFinds.

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



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.

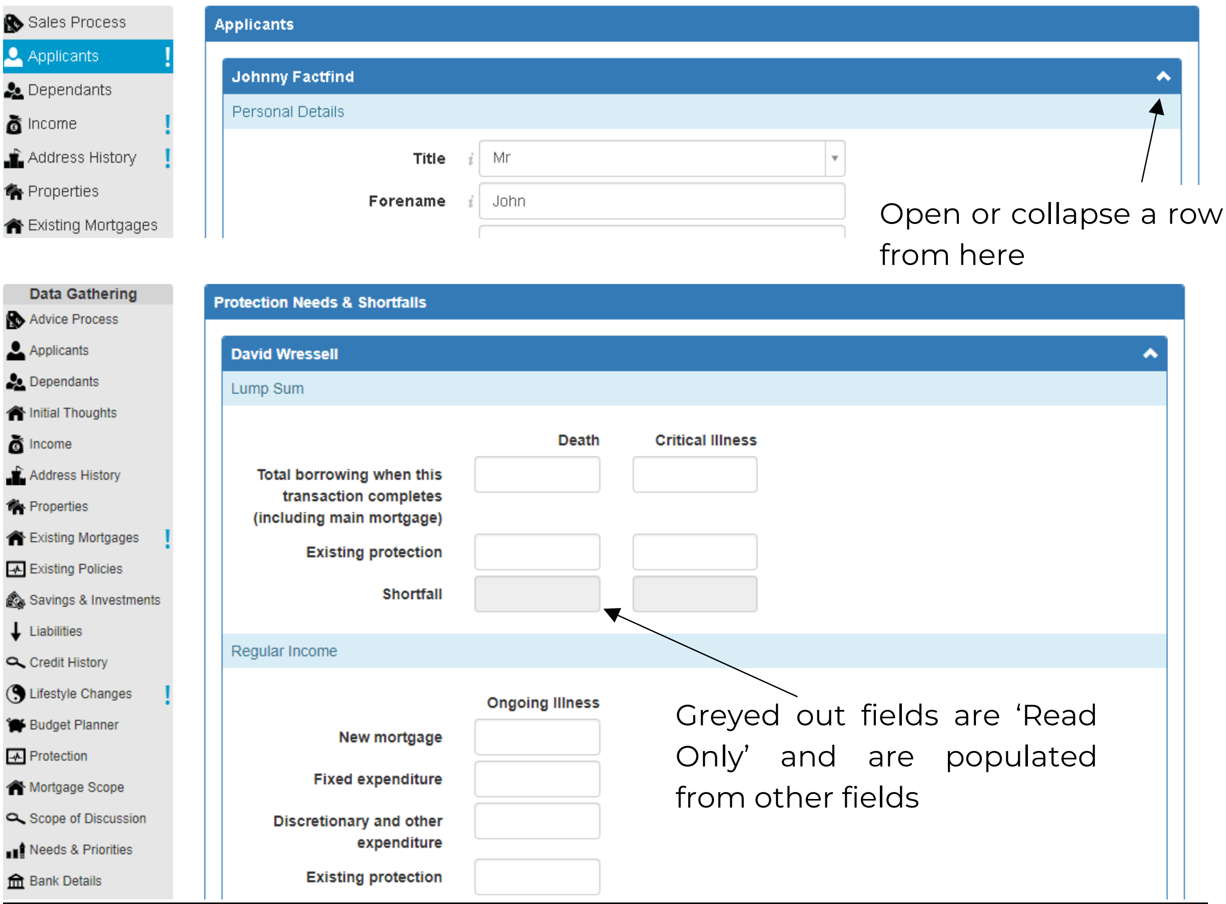


3.3 FactFind Completion

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.

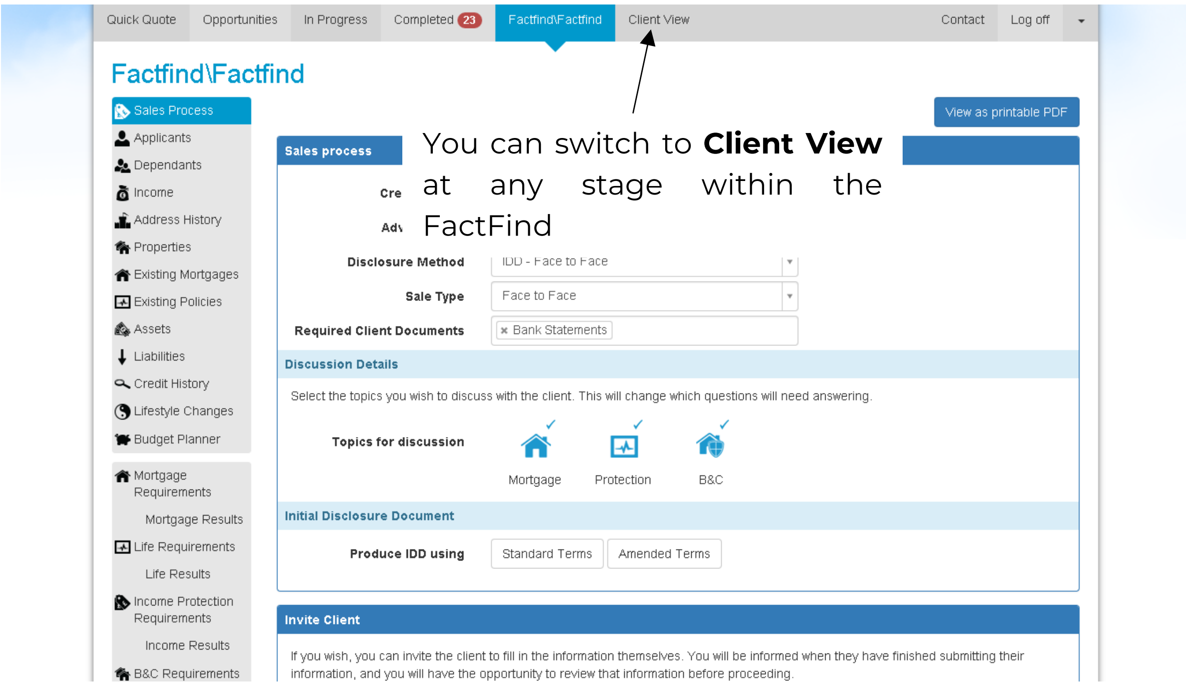
3.3.1 Advisor View

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.

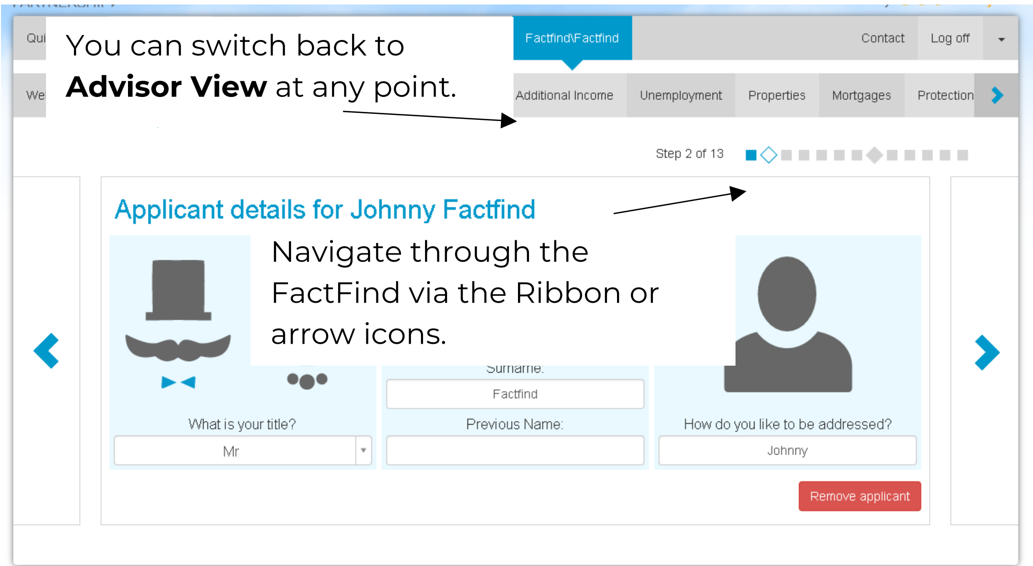


3.3.2 Client View

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.



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'**.



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.

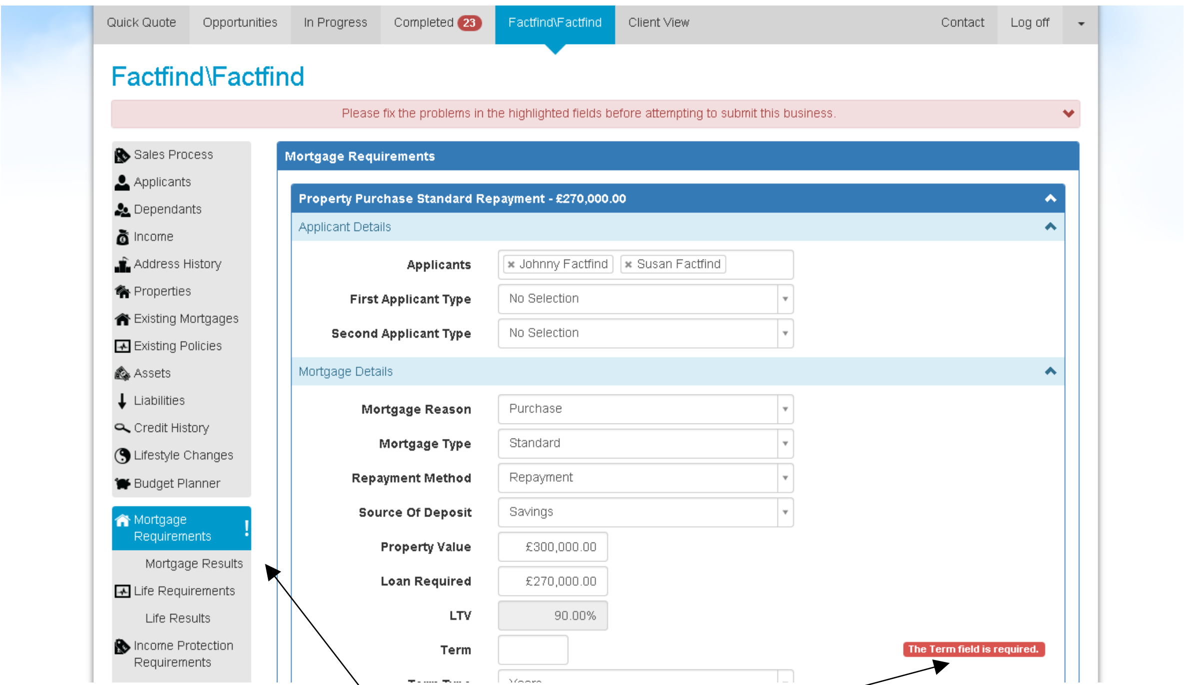
You can capture multiple requirements per need area to then carry out sourcing from and select recommendations for. The following screen shots will go through the steps of capturing requirements and displaying results for Mortgages and Life although it is the same process across all need areas.

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).

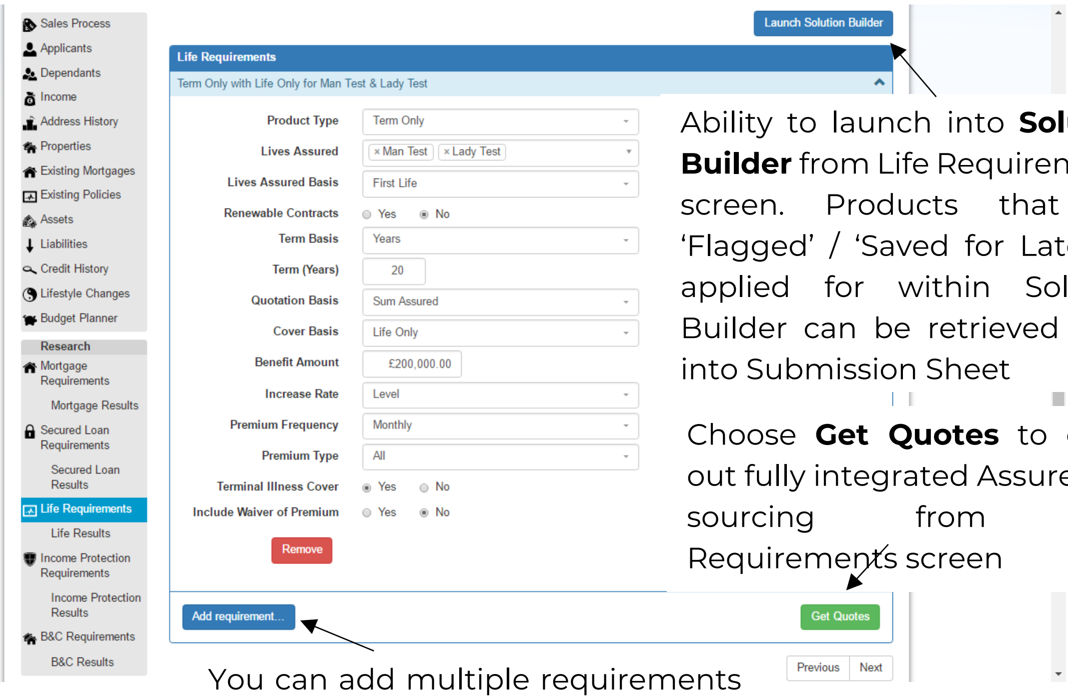
Please use your Internet Browser scroll bar to ensure all information within the Requirements screen has been captured before choosing **'Get Quotes'**.

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.



Any mandatory information which is missing will be displayed and red and highlighted on the left-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.*



Ability to launch into **Solution Builder** from Life Requirements screen. Products that are 'Flagged' / 'Saved for Later' or applied for within Solution Builder can be retrieved back into Submission Sheet

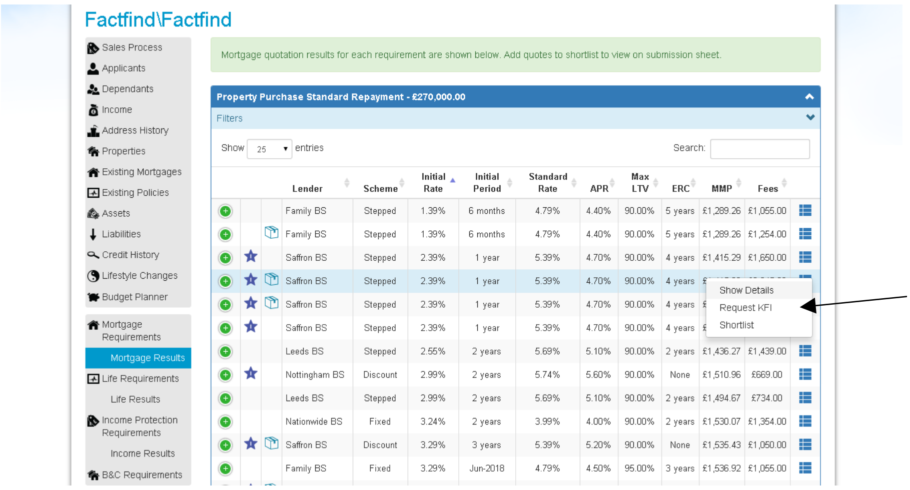
Choose **Get Quotes** to carry out fully integrated Assureweb sourcing from Life Requirements screen

You can add multiple requirements per need area to source against

3.6 Sourcing & Results

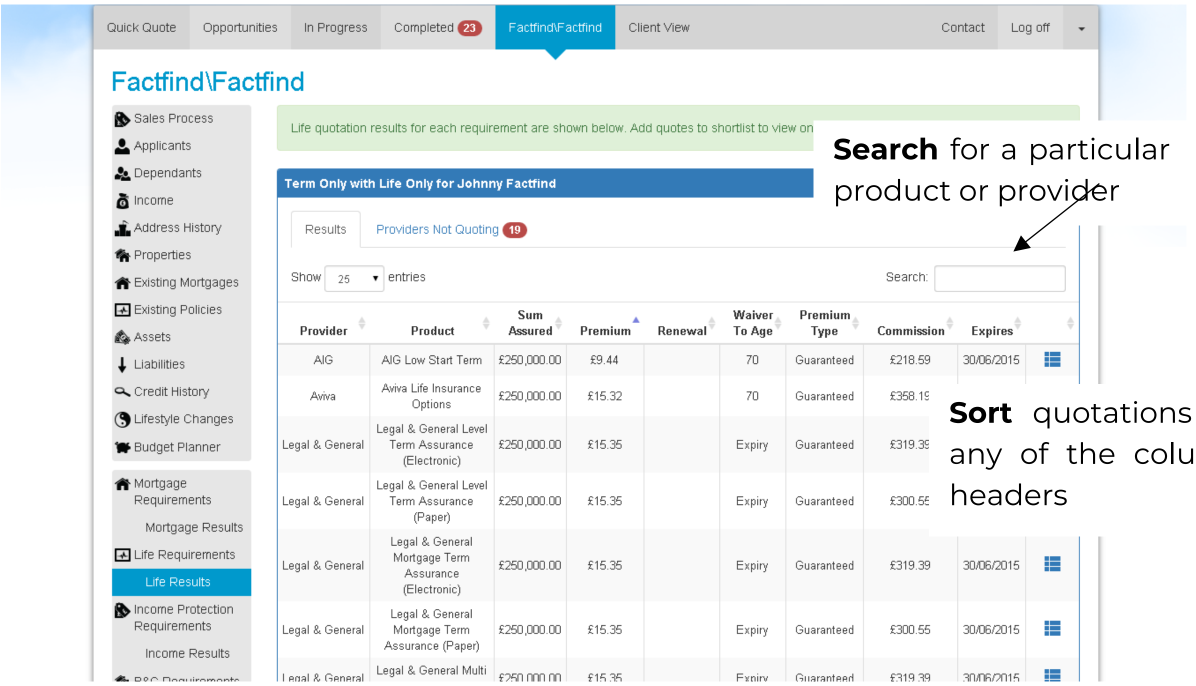
Upon choosing **'Get Quotes'** you will then move forward to the Results. Where multiple requirements are present for a need area then quotations will be displayed for each requirement.

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



Left ‘click’ against a quotation to **Show Details**, **Request Illustration** and **Shortlist**

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’.**



Search for a particular product or provider

Sort quotations by any of the column headers

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

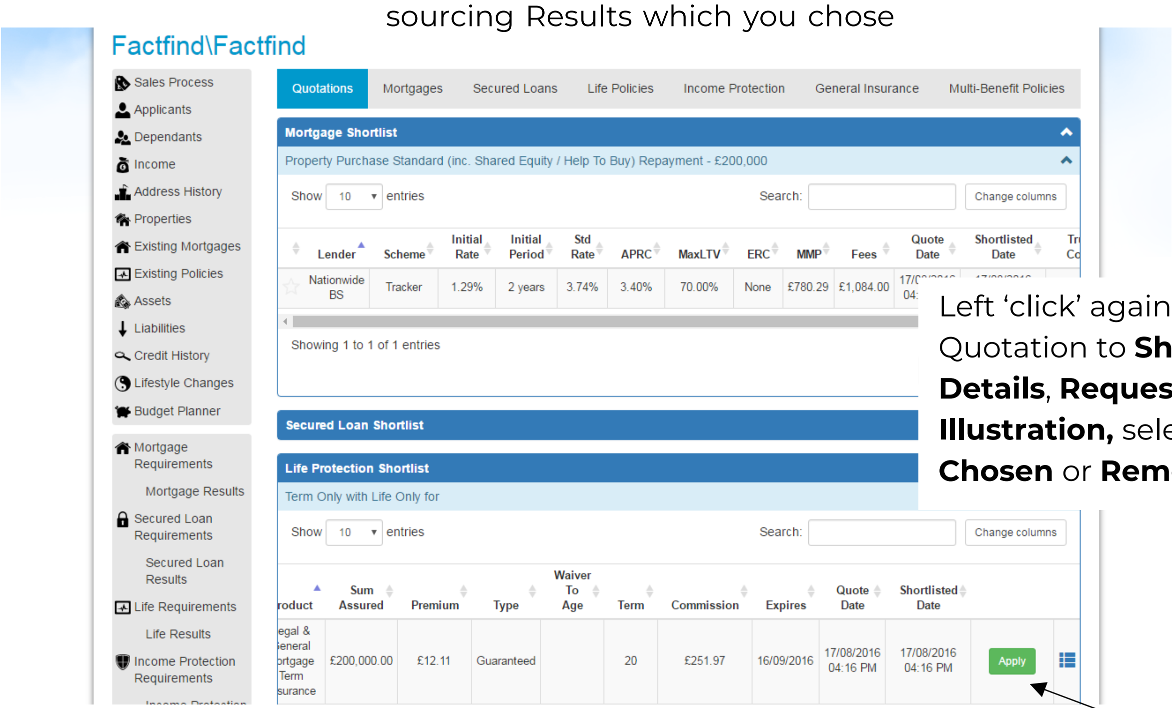
- Show Details – This will provide you with some core information regarding the quotation e.g. the provider, product, suitability and commission information.
- Request Illustration – This will allow you to produce an immedate illustration for usage. Any Illustrations produced directly from the Results 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

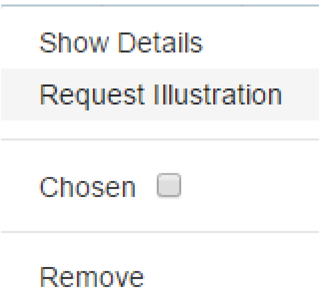


Left 'click' against a Quotation to **Show Details**, **Request Illustration,** select as **Chosen** or **Remove**

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

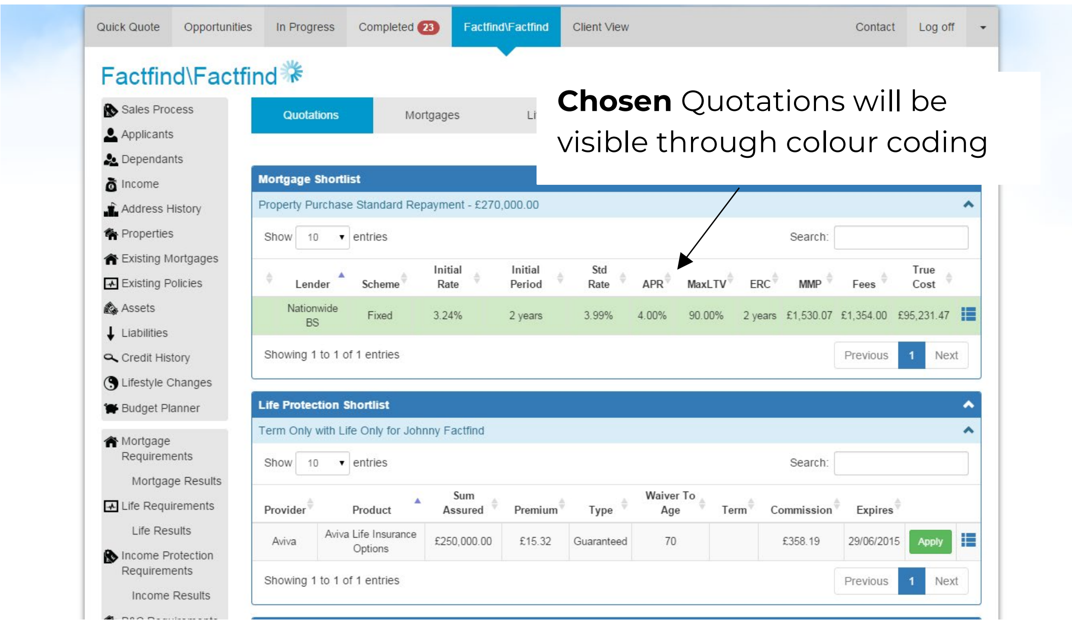
4.1 Show Details, Request Illustration, Chosen and Remove

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

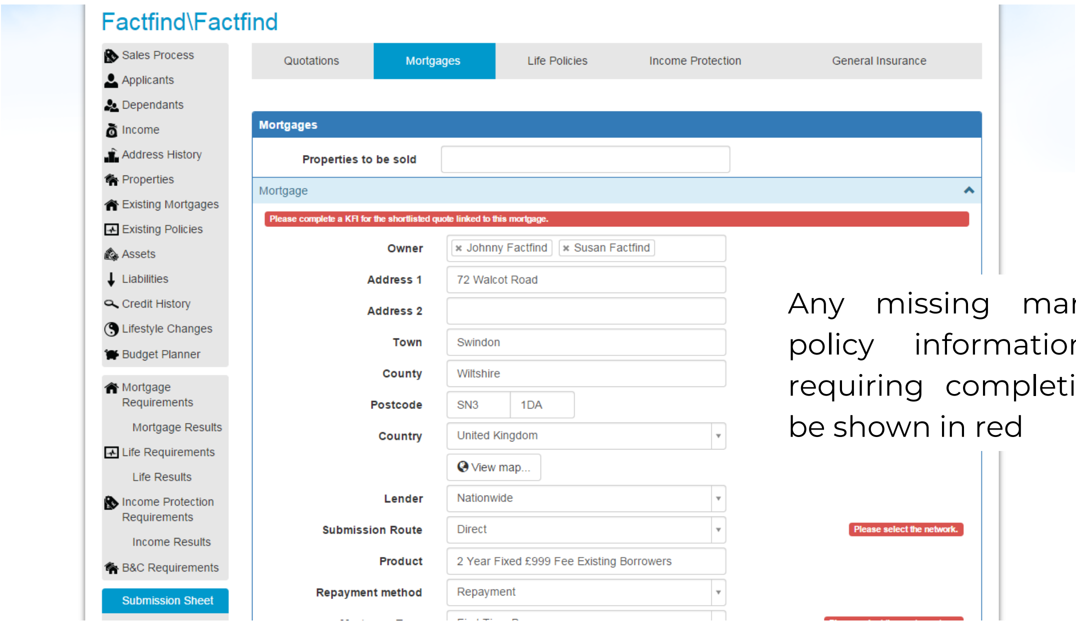


- Show Details – This will provide you with some core information regarding the quotation e.g. the provider, product, suitability and commission information.
- Request Illustration – This will allow you to produce an immedate Illustration for usage. Any Illustrations produced will automatically be uploaded 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.

- Remove – Remove from the shortlisted Quotations.



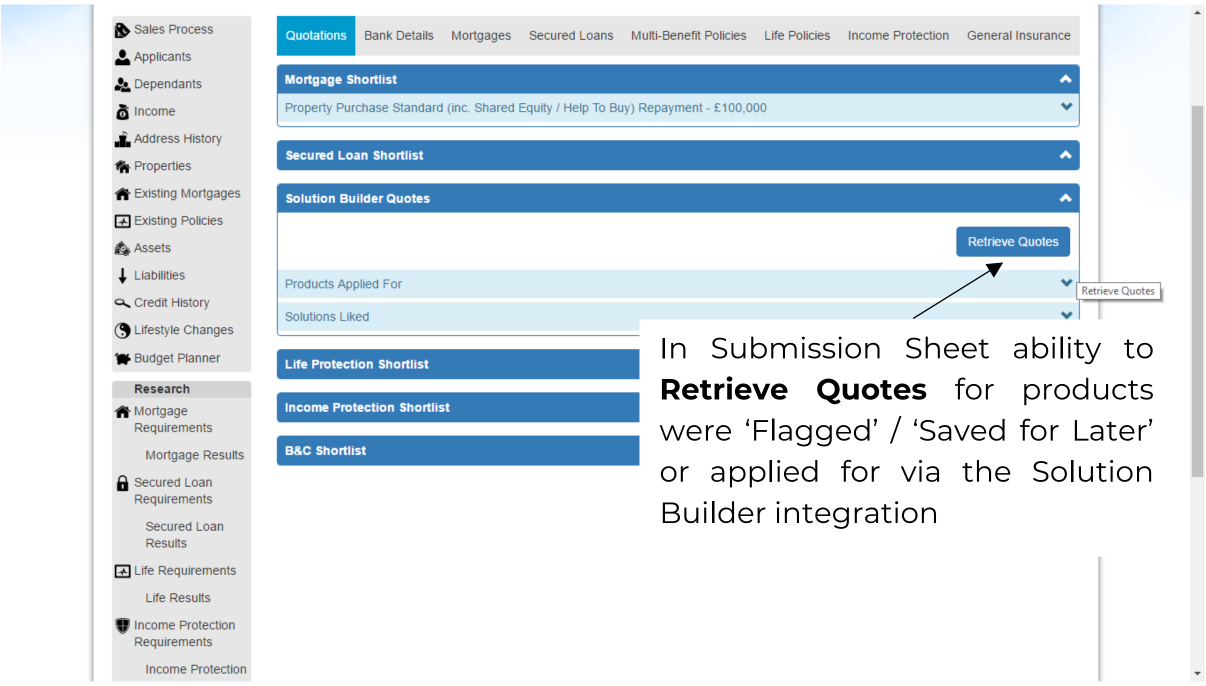
Chosen Quotations will be visible through colour coding



Any missing mandatory policy information and requiring completion will be shown in red

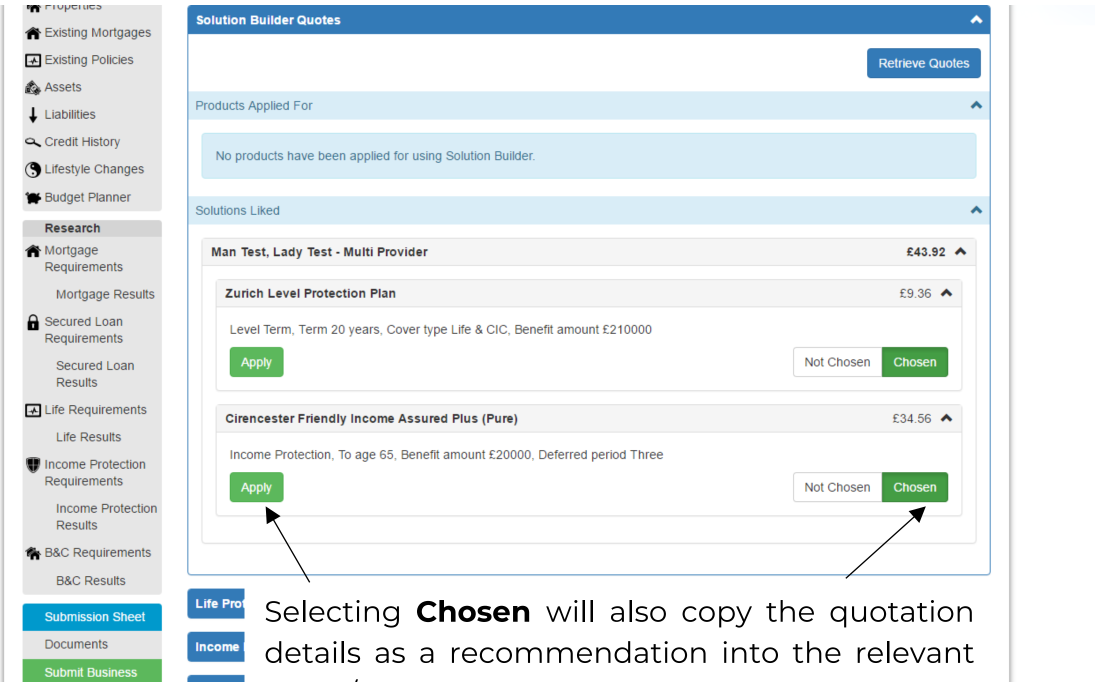
4.2 Retrieving Solution Builder Quotes

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’.**



In Submission Sheet ability to **Retrieve Quotes** for products were 'Flagged' / 'Saved for Later' or applied for via the Solution Builder integration

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



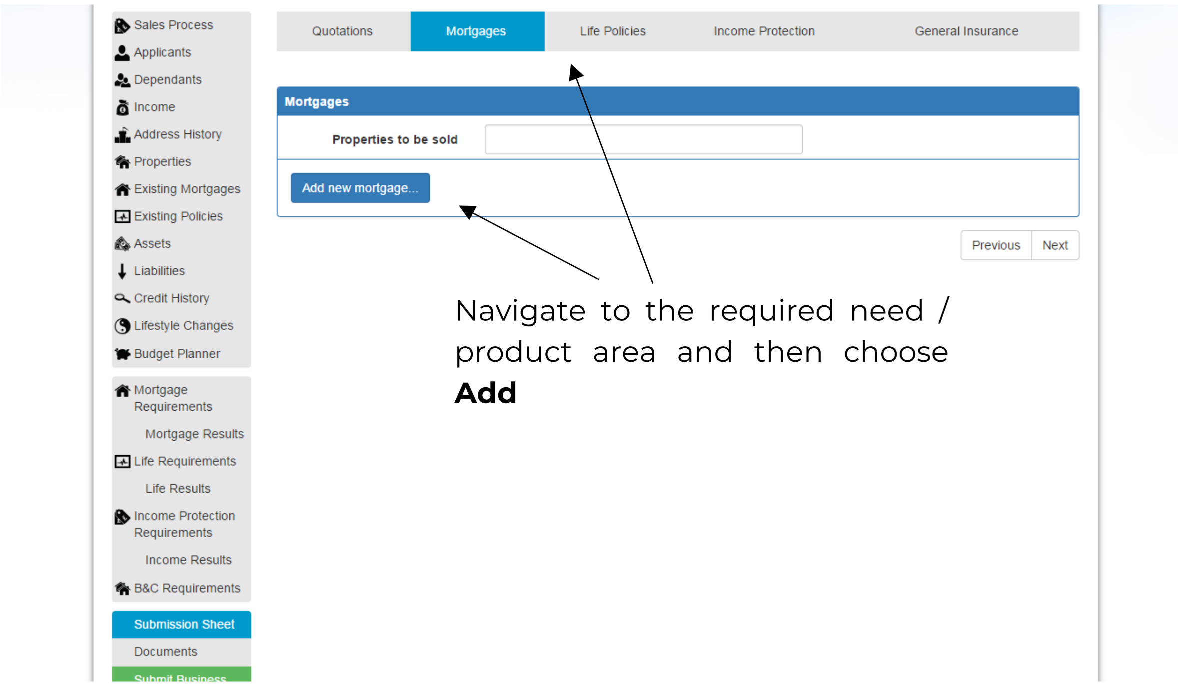
Selecting **Chosen** will also copy the quotation details as a recommendation into the relevant need / product area

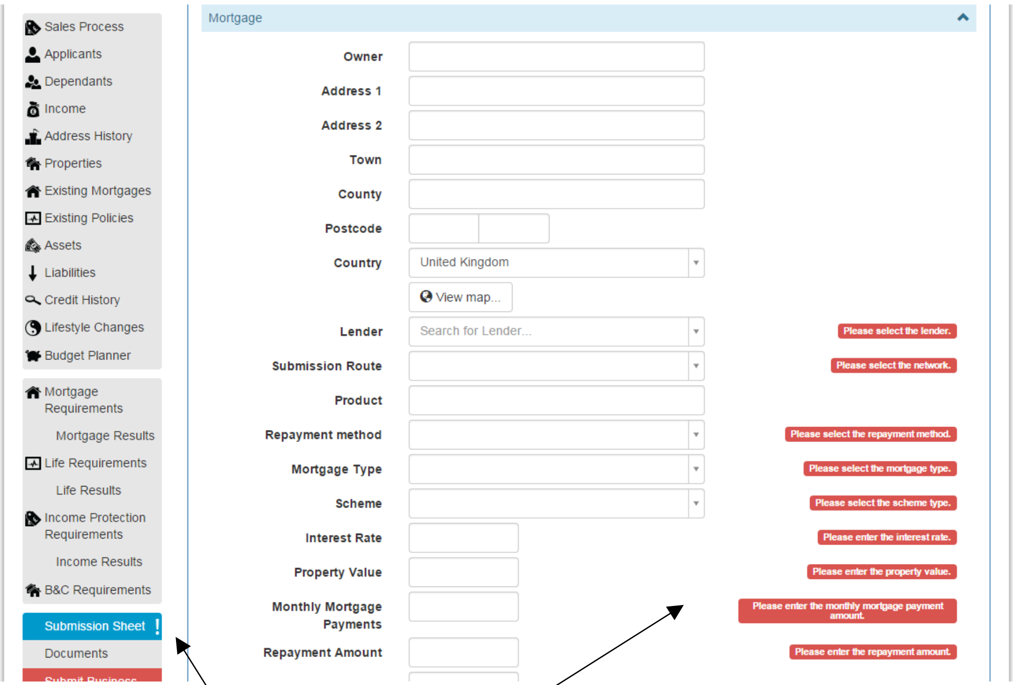
Ability to **Apply** a retrieved Solution Builder product

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.





Complete the required data items of the product you are recommending. Missing mandatory data will be displayed

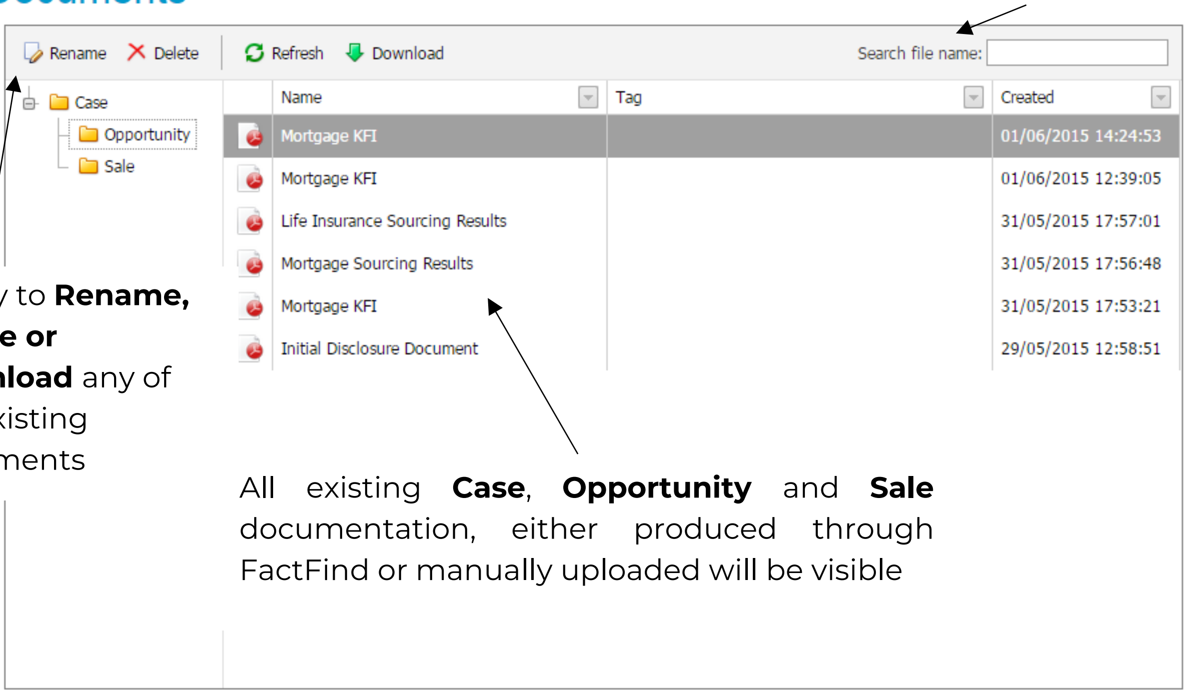
5.0 DOCUMENTS

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.

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.

Documents

Ability to manually **Search** for documents

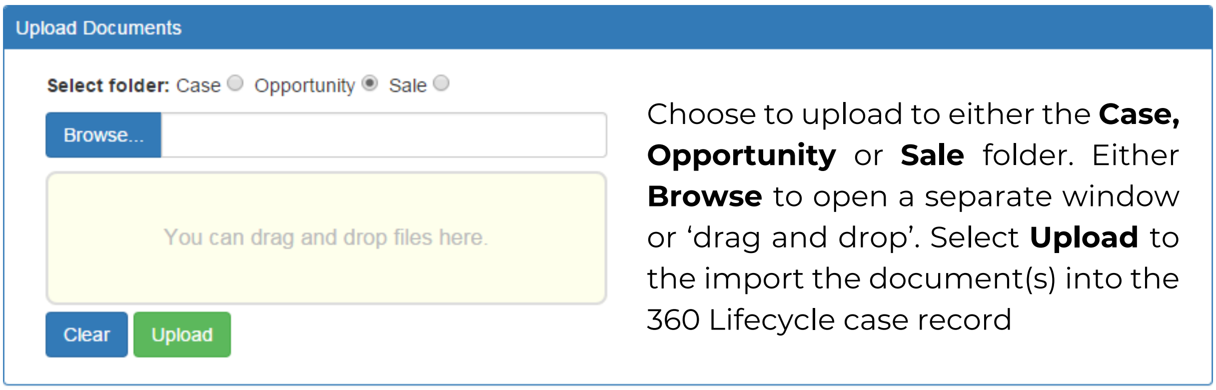


Ability to **Rename, Delete or Download** any of the existing documents

All existing **Case**, **Opportunity** and **Sale** documentation, either produced through FactFind or manually uploaded will be visible

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.



Choose to upload to either the **Case, Opportunity** or **Sale** folder. Either **Browse** to open a separate window or 'drag and drop'. Select **Upload** to the import the document(s) into the 360 Lifecycle case record

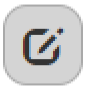
6.0 NOTES

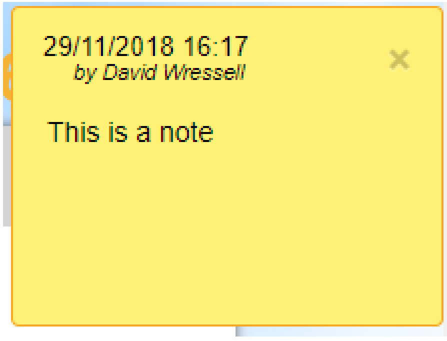
You have the ability to **'Add Note'** against any page of the Online FactFind. Multiple notes can be added against a page and notes can be added or edited at any time until you have chosen to 'Submit Business' or Cancel / Delete the FactFind.

6.1 Add Note

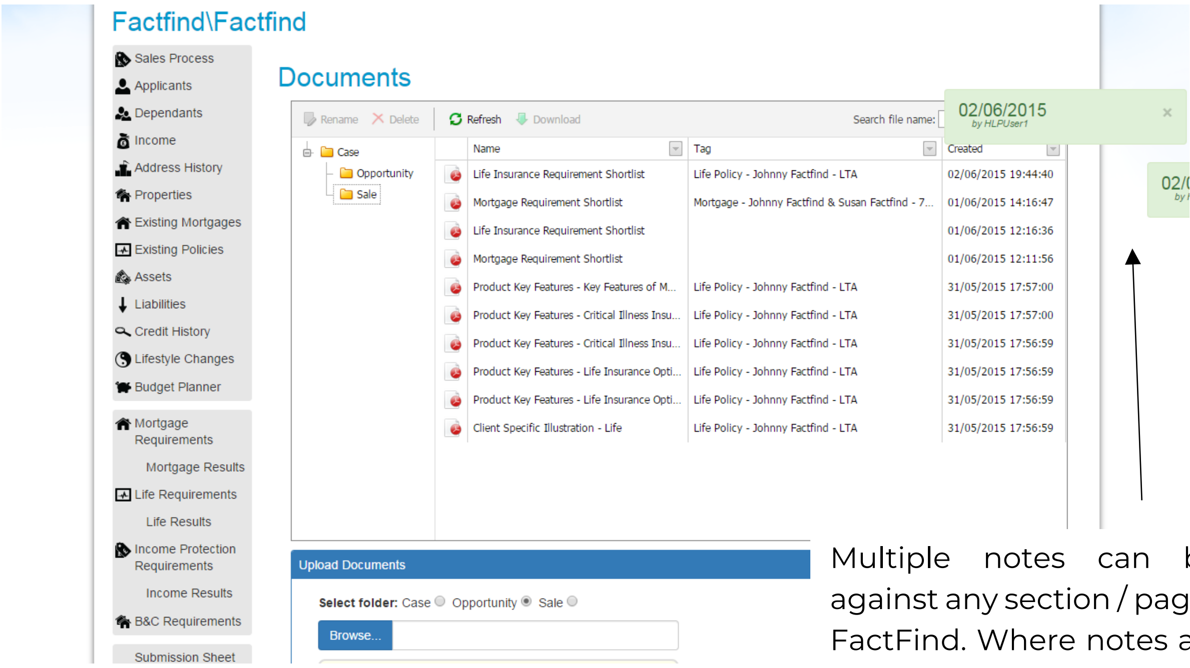
To '**Add Note'** against any stage of the FactFind process first of all navigate to the page for which you would like to record your notes. From the right hand corner select the **'Add Note'** icon. These can be added to the side of every page, or against an individual section, such as 'Employment Income'.

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





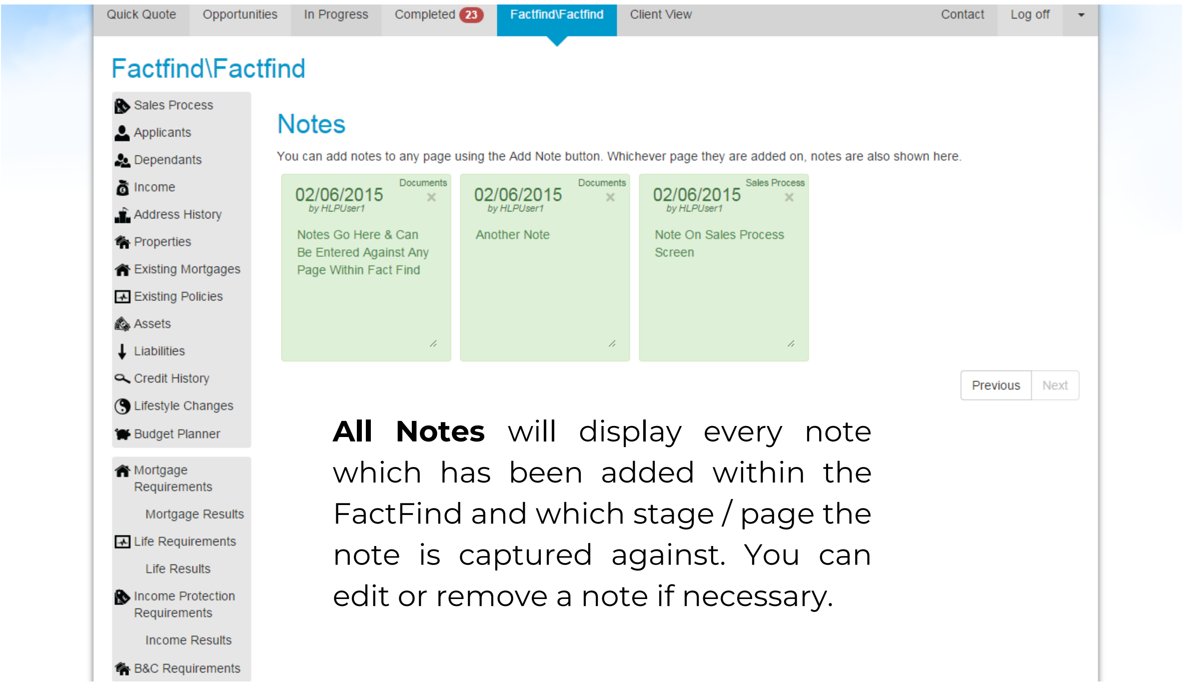
Enter or edit your free text notes within the pop-up window. If required, the note can be removed by clicking on **X**



Multiple notes can be added against any section / page of Online FactFind. Where notes are present they will show on the right hand side of the page.

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.



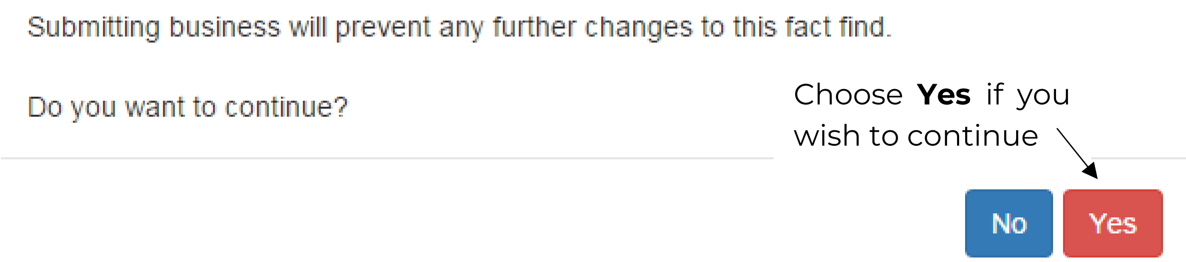
All Notes will display every note which has been added within the FactFind and which stage / page the note is captured against. You can edit or remove a note if necessary.

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.

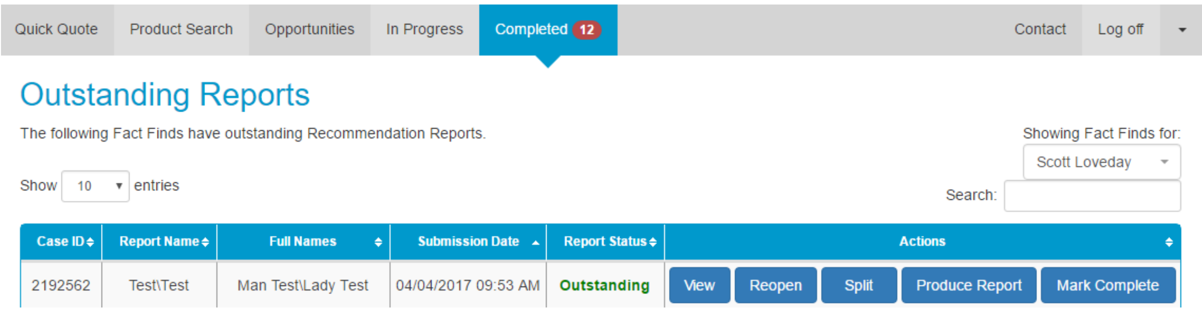
Once all mandatory data is entered the **Submit Business** label will move from red to green.

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



Choose **Yes** if you wish to continue

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.

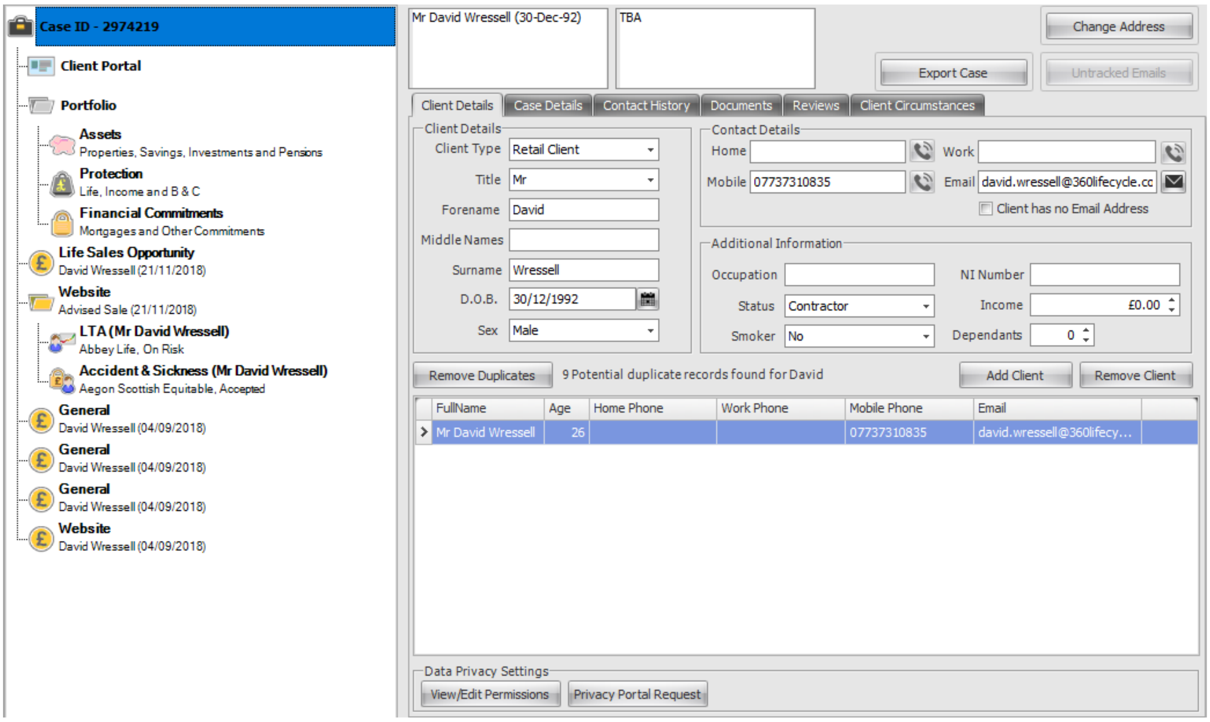


- View – This will open a PDF copy of the completed FactFind.
- Reopen – Choosing Reopen will create a new and fully editable ‘cloned’ copy of the original FactFind. The newly cloned FactFind will be attached to a new opportunity against the 360 Lifecycle case record named ‘Reopened Sales Process’.
- 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.

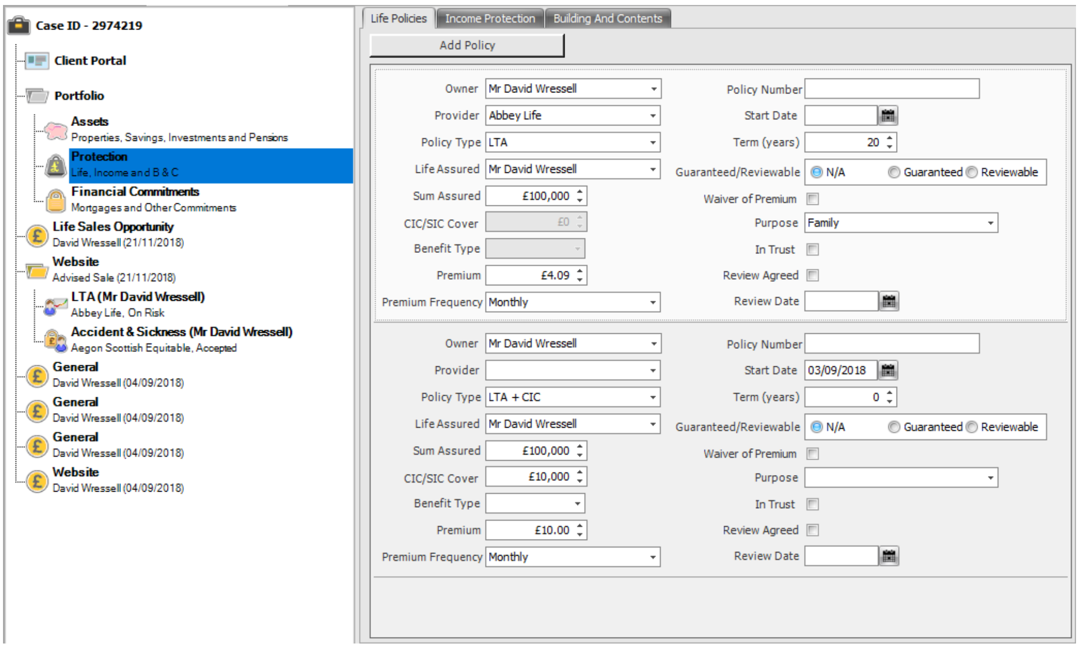
7.1 Updates To The 360 Lifecycle Case Record

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;

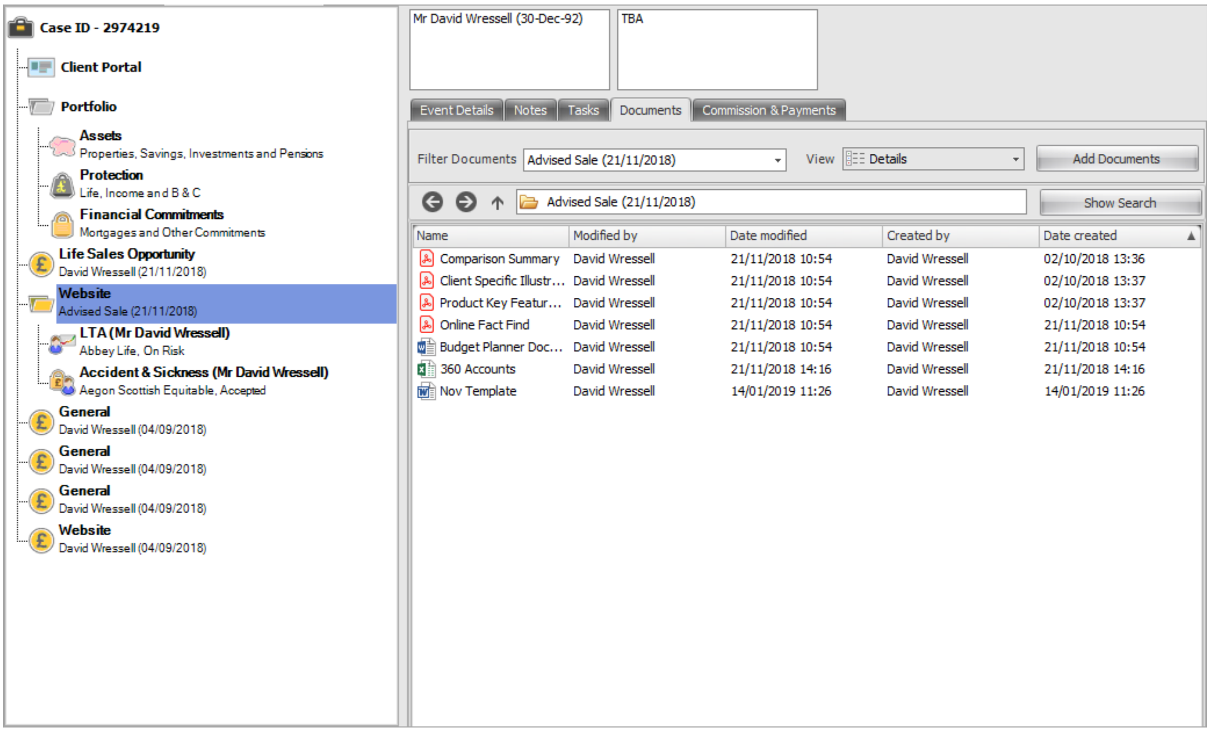
1. The case record will include udpates to the client Personal Details and a new sale event created with the ‘Chosen’ policy records



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



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.

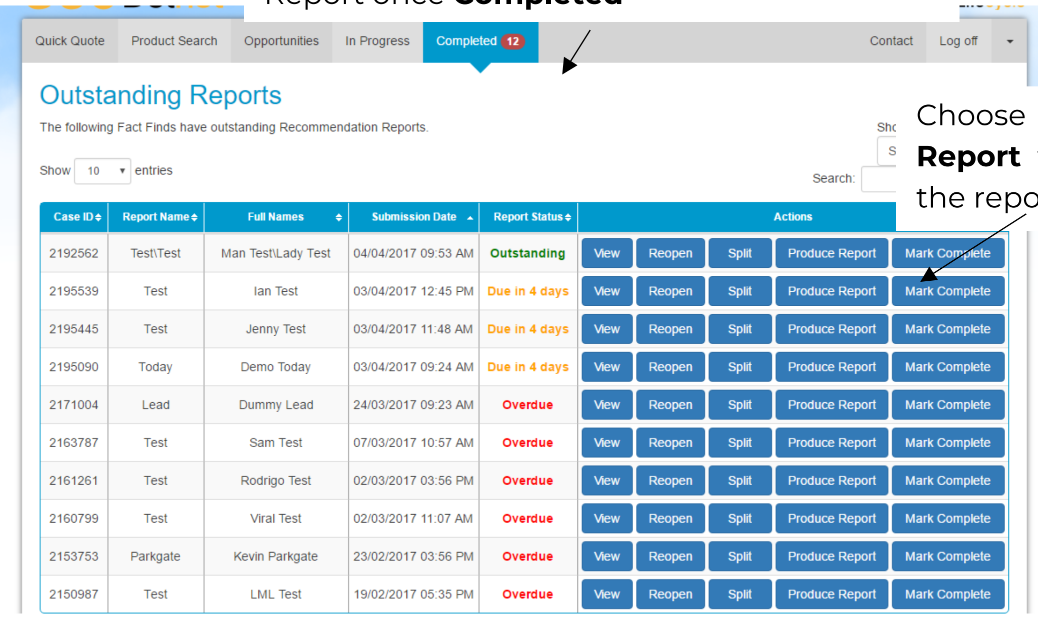


For further information on the 360 Lifecycle case record please refer to the other 360 Lifecycle Navigation Guides.

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'.**

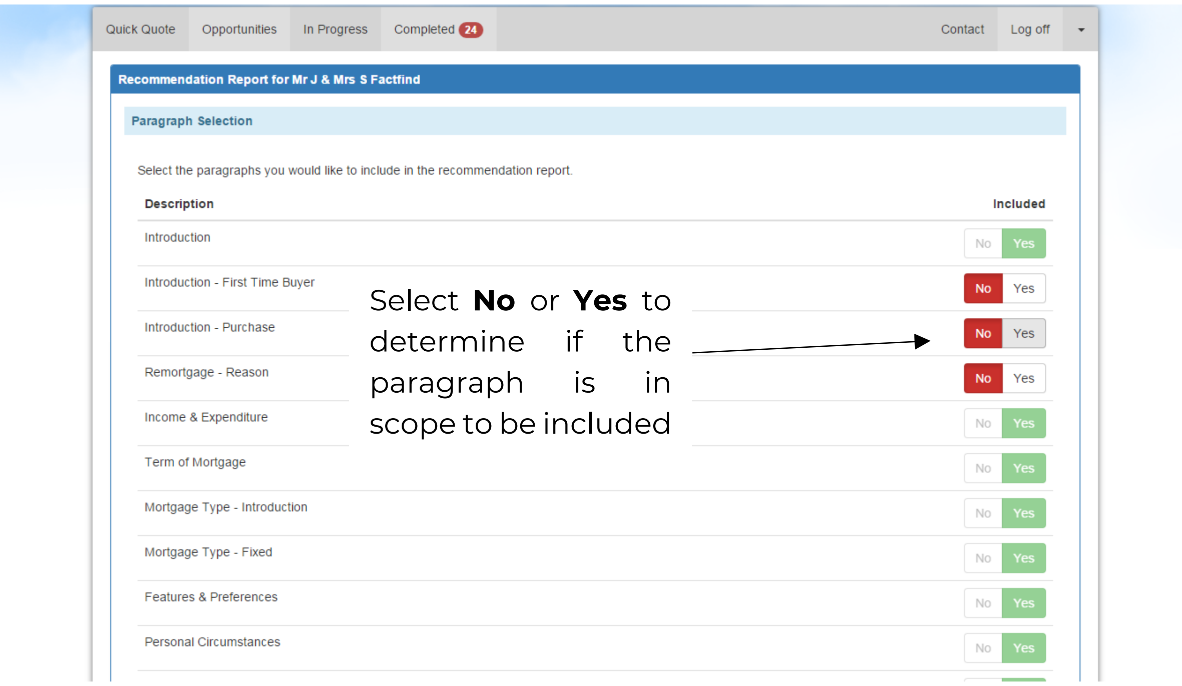
You can only produce the Recommendation Report once **Completed**



Case ID	Report Name	Full Names	Submission Date	Report Status	Actions				
2192562	Test\Test	Man Test\Lady Test	04/04/2017 09:53 AM	Outstanding	View	Reopen	Split	Produce Report	Mark Complete
2195539	Test	Ian Test	03/04/2017 12:45 PM	Due in 4 days	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

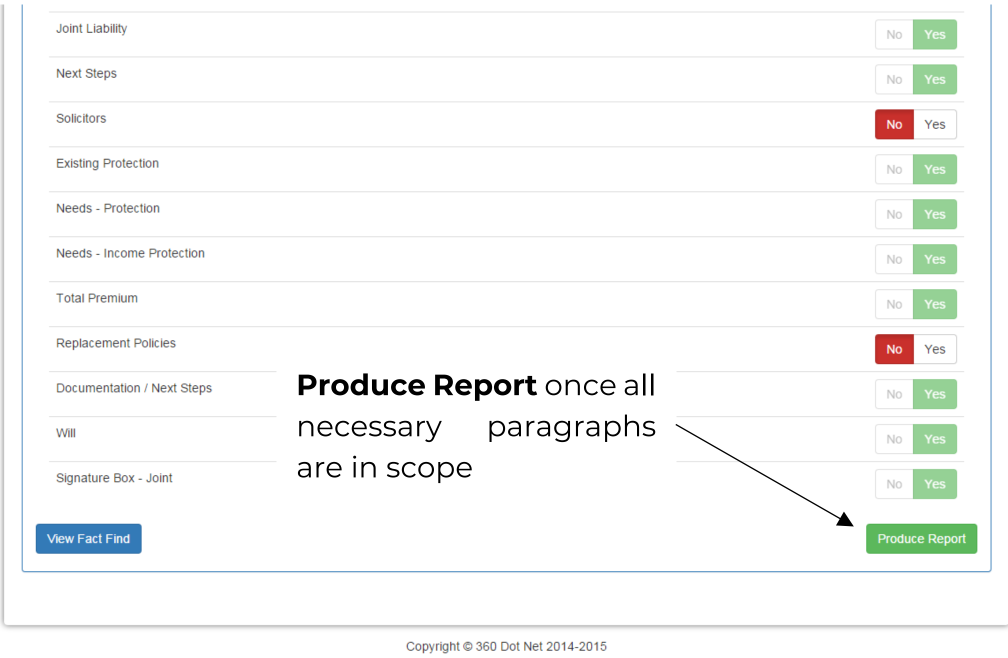
Choose **Produce Report** to launch the report builder

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.



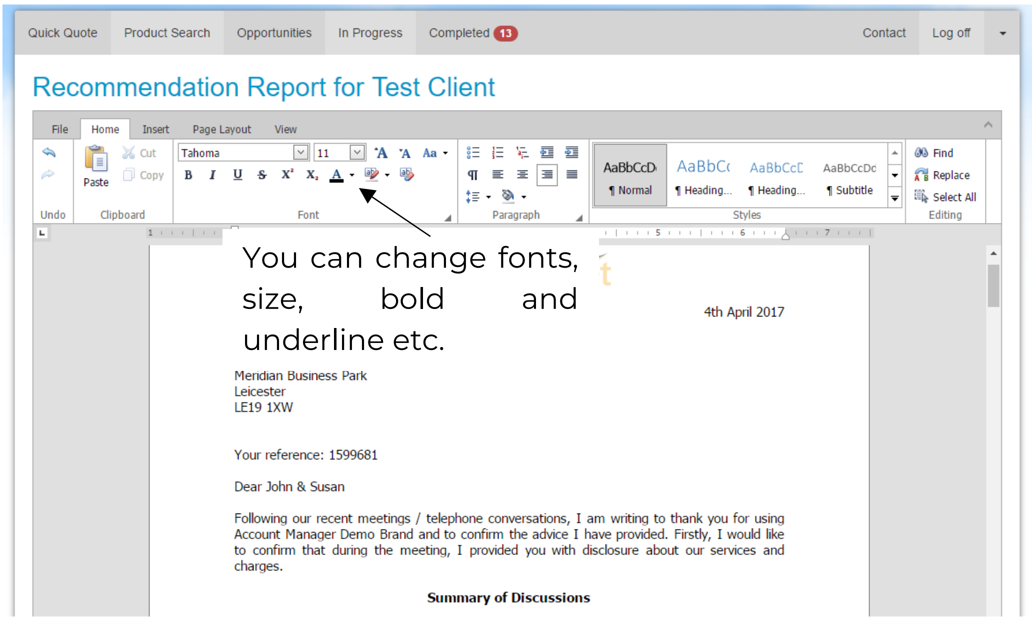
Select **No** or **Yes** to determine if the paragraph is in scope to be included

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

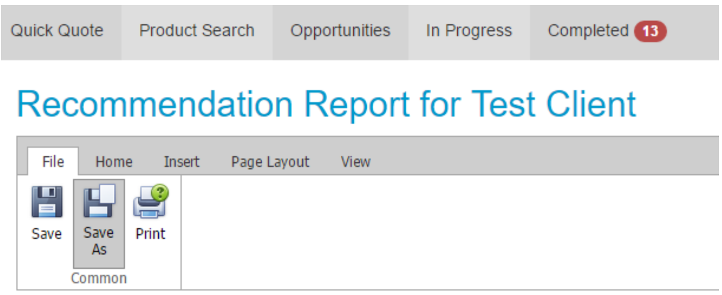


Produce Report once all necessary paragraphs are in scope

The fully editable Recommendation Report will then be launched.

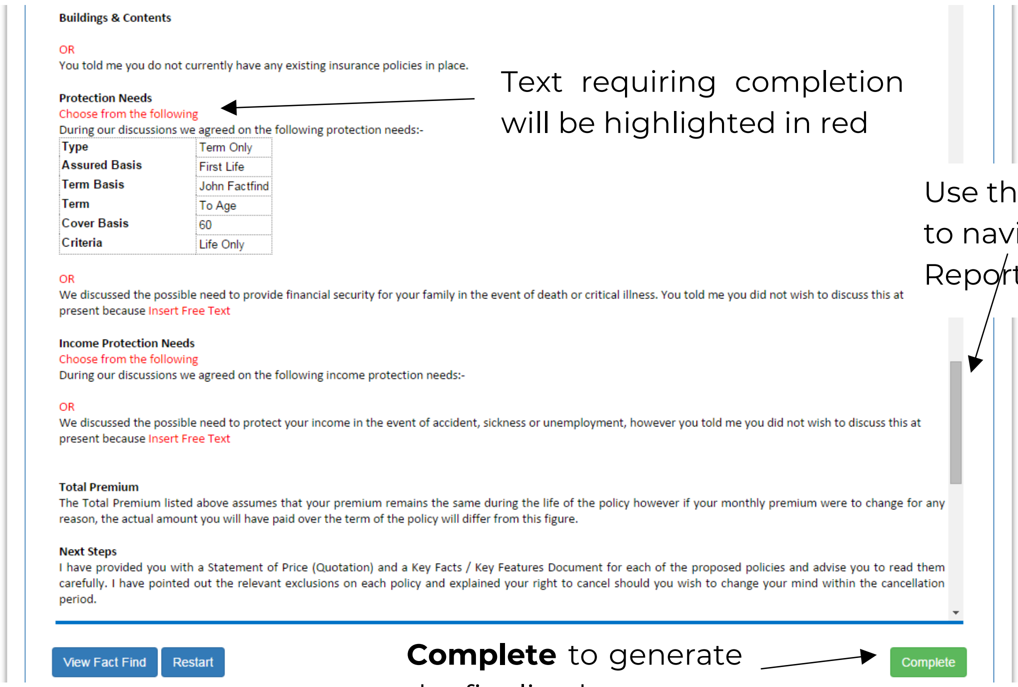


You can change fonts, size, bold and underline etc.



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

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


Buildings & Contents

OR
You told me you do not currently have any existing insurance policies in place.

Protection Needs
Choose from the following
During our discussions we agreed on the following protection needs:-

Type	Term Only
Assured Basis	First Life
Term Basis	John Factfind
Term	To Age
Cover Basis	60
Criteria	Life Only

OR
We discussed the possible need to provide 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 Insert Free Text

Income Protection Needs
Choose from the following
During our discussions we agreed on the following income protection needs:-

OR
We discussed the possible need to protect your income in the event of accident, sickness or unemployment, however you told me you did not wish to discuss this at present because Insert Free Text

Total Premium
The Total Premium listed above assumes that your premium remains the same during the life of the policy however if your monthly premium were to change for any reason, the actual amount you will have paid over the term of the policy will differ from this figure.

Next Steps
I have provided you with a Statement of Price (Quotation) and a Key Facts / Key Features Document for each of the proposed policies and advise you to read them carefully. I have pointed out the relevant exclusions on each policy and explained your right to cancel should you wish to change your mind within the cancellation period.

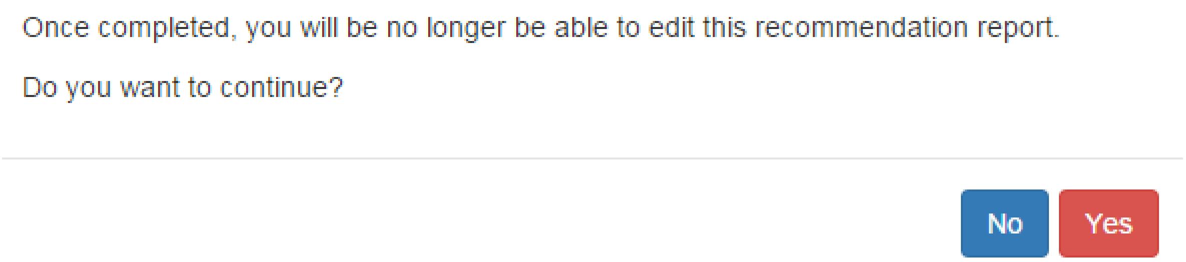
Text requiring completion will be highlighted in red

Use the scroll bar to navigate the Report

Complete to generate the finalised report

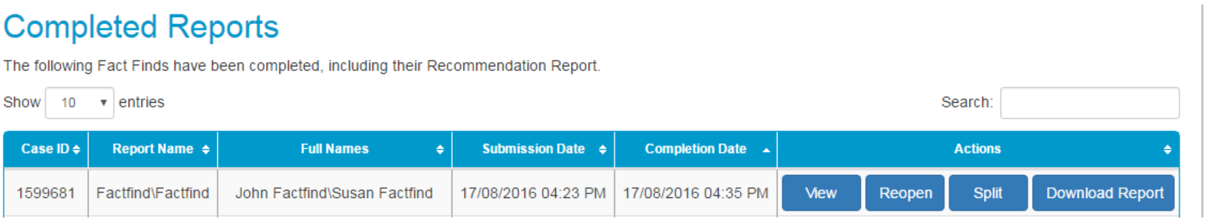
View FactFind will launch the FactFind as a PDF document. **Restart** will remove any changes.

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.



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

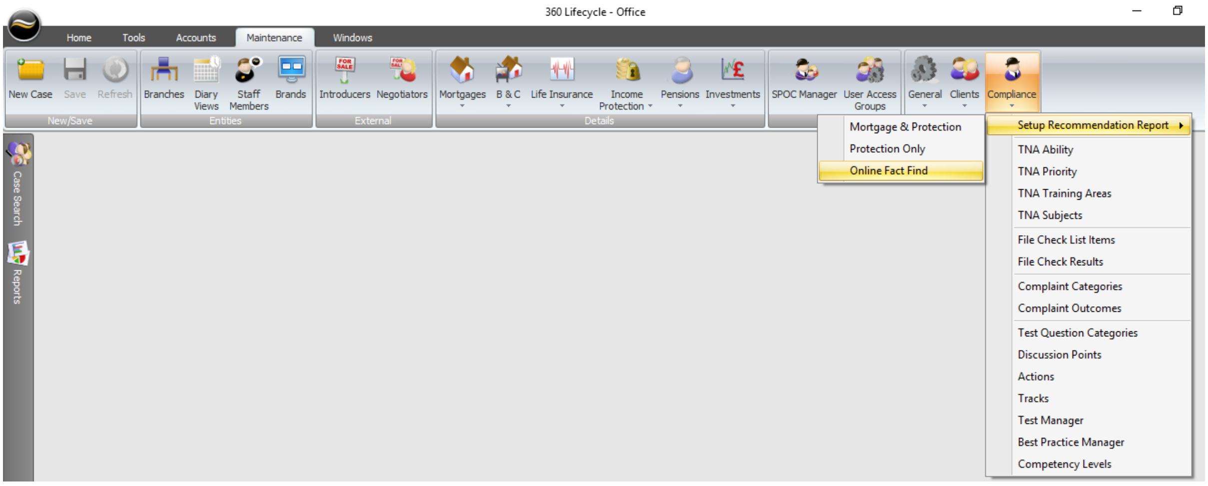


9.0 CREATING OR AMENDING RECOMMENDATION REPORT TEMPLATES

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'.

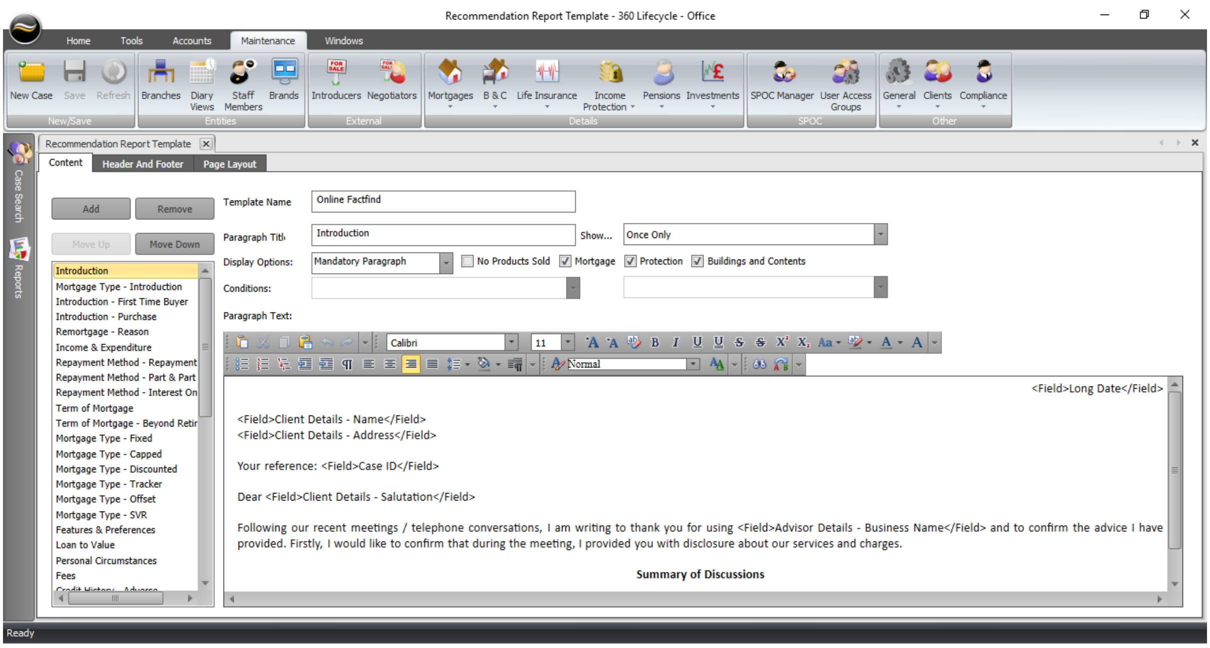
9.1 Getting Started

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'.**

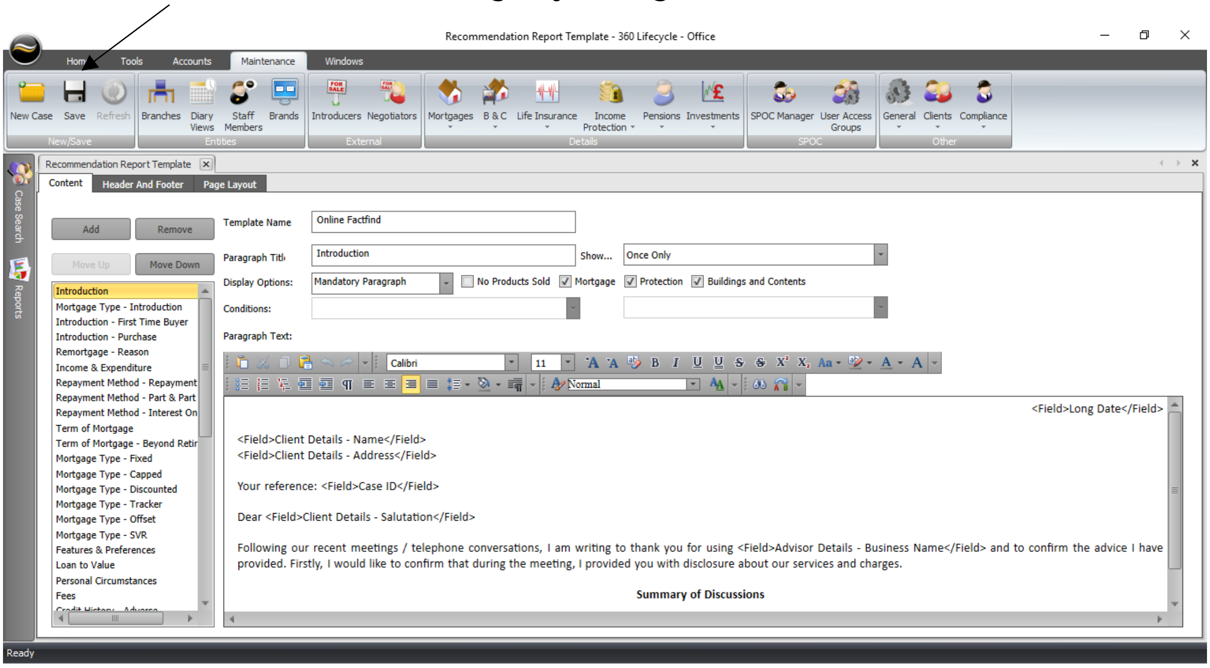
You will then be taken to the Recommendation Report Template and where any existing templates will be displayed within the Content tab.



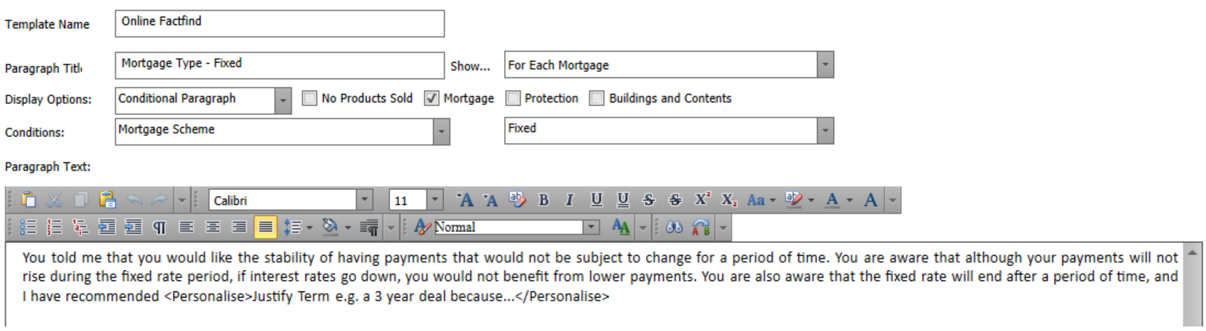
9.2 Amending Recommendation Report Content

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

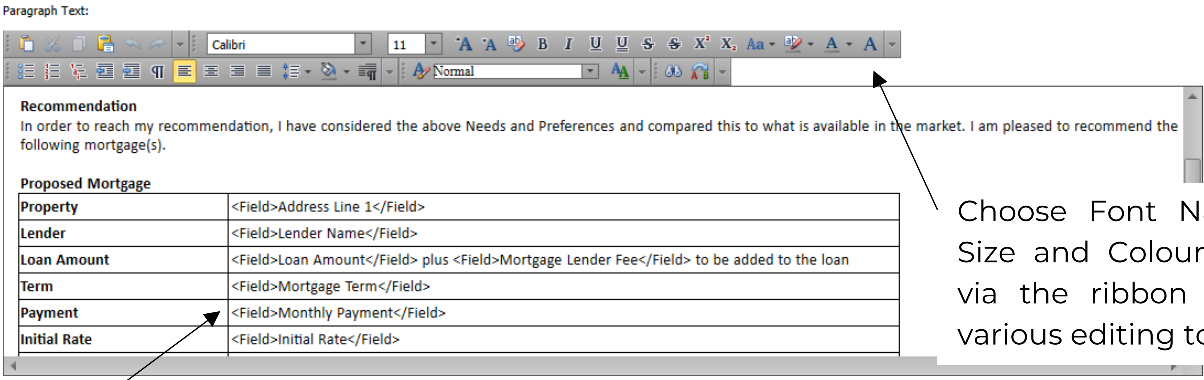


You can **Add** or **Remove** paragraphs and reorder by choosing **Move Up** or **Move Down.** This is the order the paragraphs will be displayed within Online FactFind



- 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....

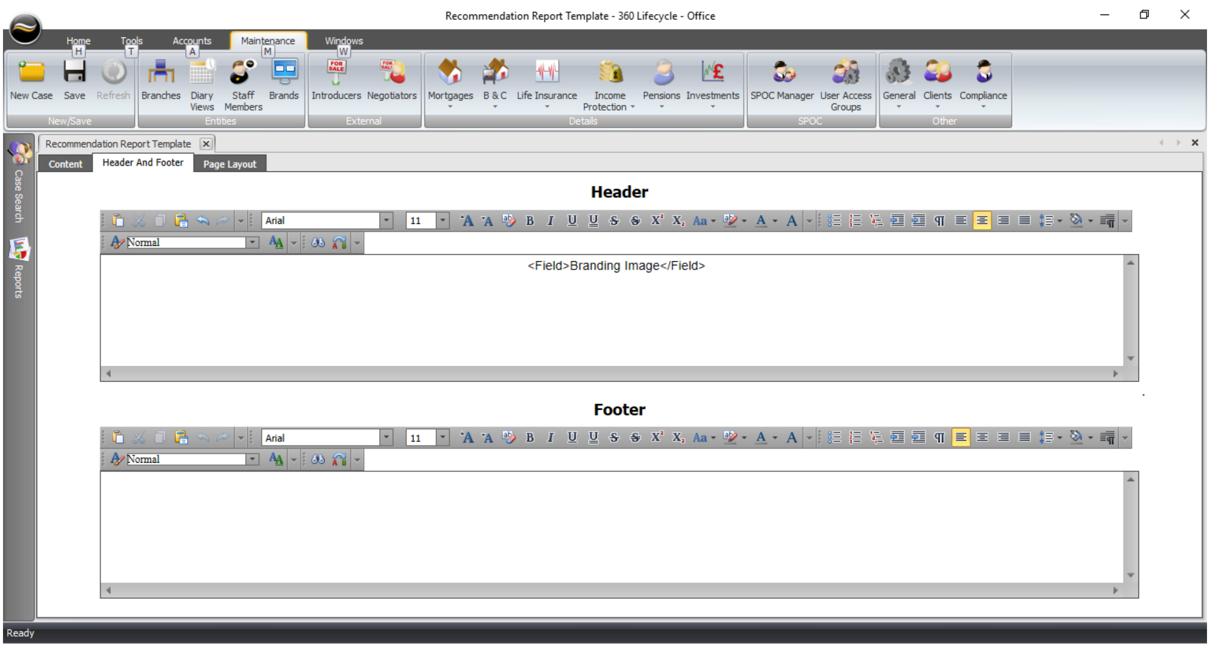


Choose Font Name, Size and Colour etc. via the ribbon with various editing tools.

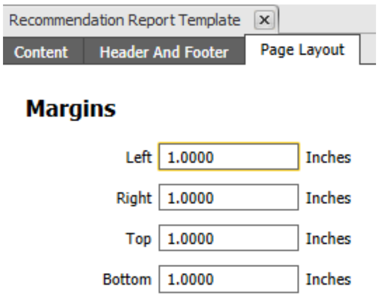
Merge Fields can be included by ‘right clicking’ within the Paragraph Text. ‘Insert Field’ provides individual merge items e.g. Mortgage Initial Rate. ‘Insert List’ will group multiple merge items and list together within the Recommendation Report (see below chart)

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.



9.4 Page Layout



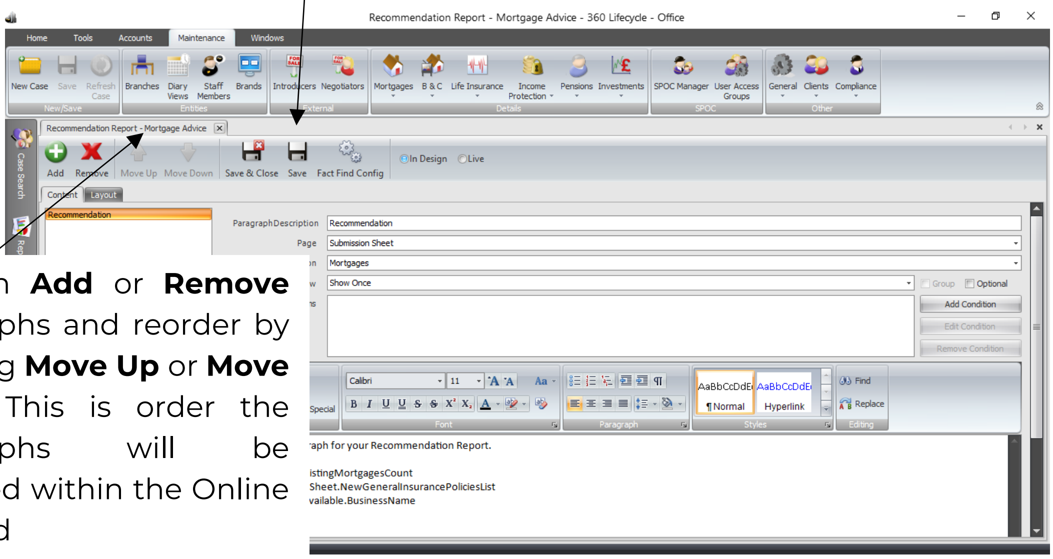
If desired the Recommendation Report margins can be altered within Page Layout.

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

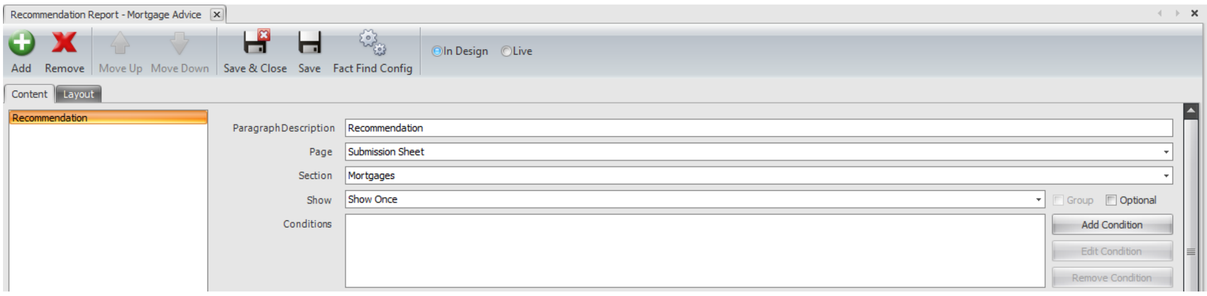
NOTE – if one of these templates is not populated, you will automatically get the report produced from the template edited above.

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 **'Save'** after making any changes

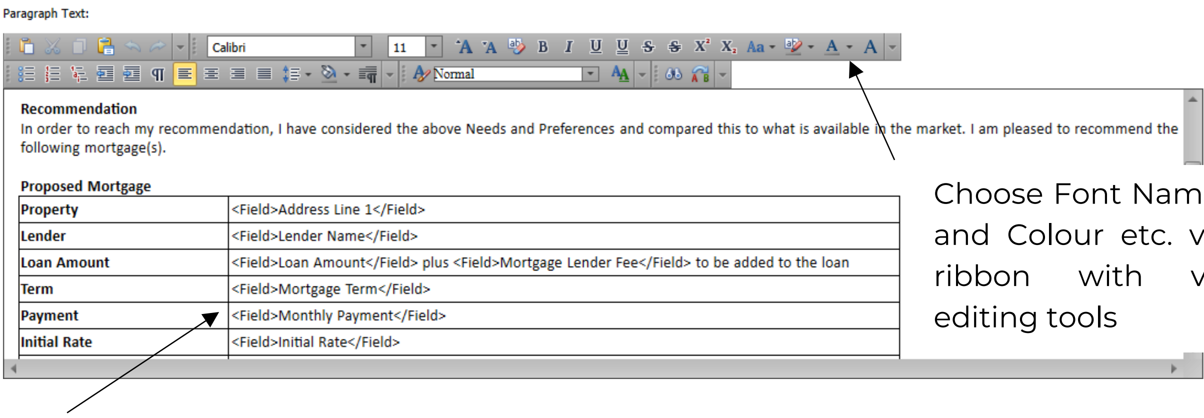


You can **Add** or **Remove** paragraphs and reorder by choosing **Move Up** or **Move Down.** This is order the paragraphs will be displayed within the Online FactFind



- 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.

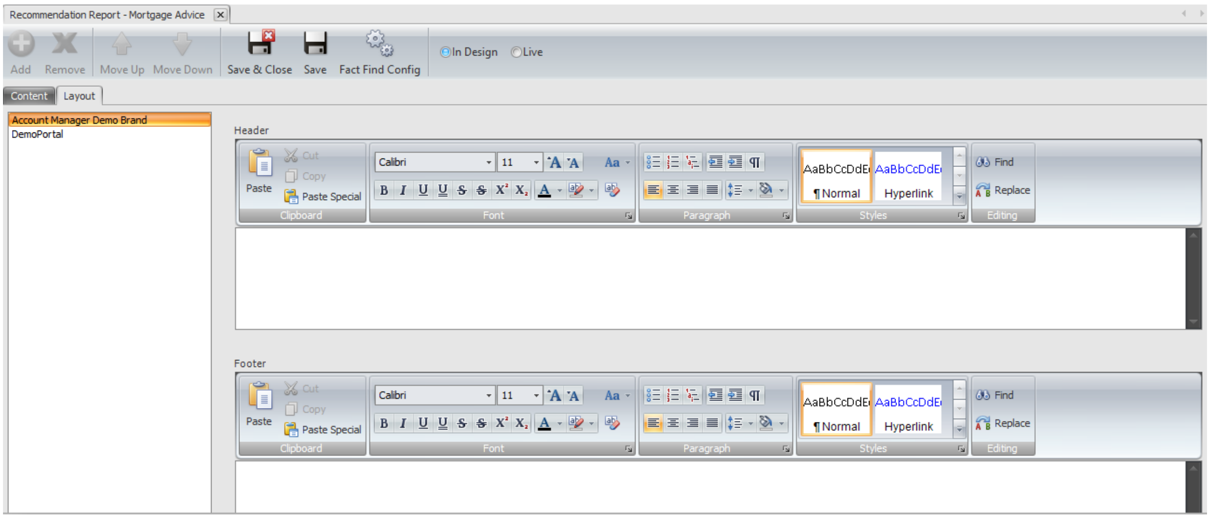


Choose Font Name, Size and Colour etc. via the ribbon with various editing tools

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)

9.6 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.



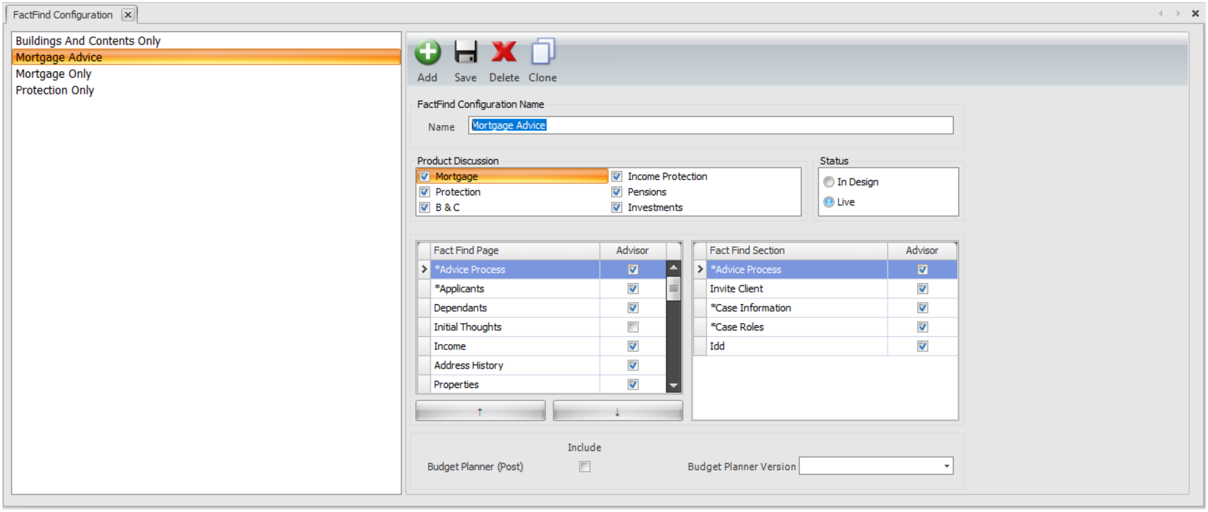
N.B. these templates are configured PER FactFind you have created within 360. This means if you want a template for each of these, they will need to be added in. If you require these to be copied from one template to another, please contact our Support team.

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.



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.