

# **360**Lifecycle

## **Online FactFind Training Manual**

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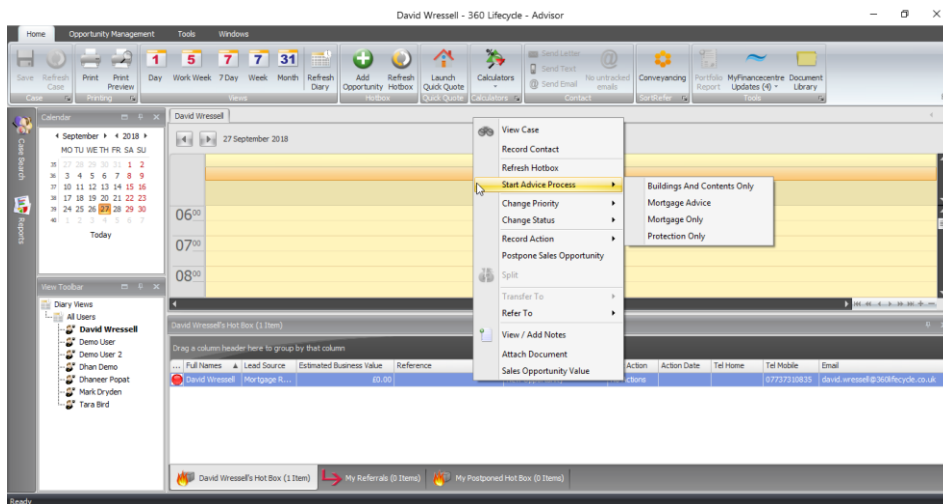
## 1.0 INTRODUCTION

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.

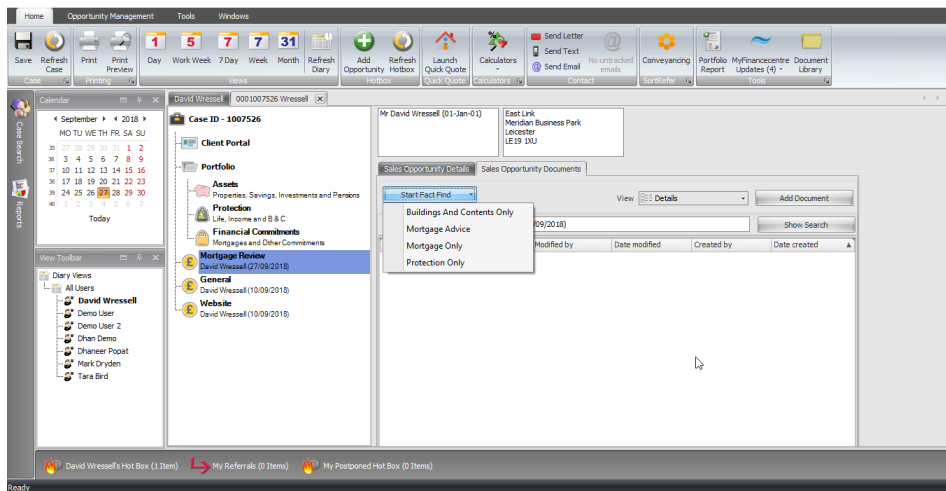
360 Lifecycle Online FactFind offers you the option to 'Invite Client' so your clients can complete, or part complete FactFind at any stage and potentially in advance of any appointment. 360 Online FactFind can be accessed from any web enabled device, thus allowing you to be in control and having access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

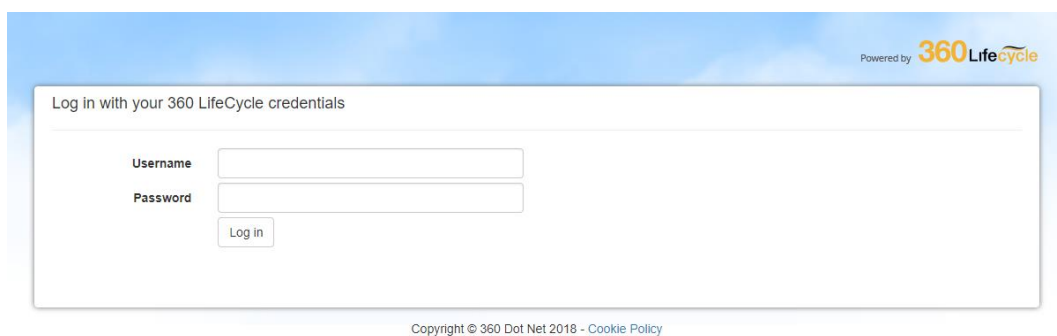
Online FactFind can be launched or accessed in one of three ways;



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

Powered by **360 Lifecycle**

Quick Quote Product Search Opportunities **In Progress** Completed **2** Contact Log off

My Fact Finds Additional Fact Finds

The following Fact Finds are currently in progress.

Show  entries Search:

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

Quick Quote Product Search Opportunities **In Progress** Completed **67**

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.

The screenshot shows the 'Quick Mortgage Quote' form on the 360Dotnet website. The form is titled 'Quick Mortgage Quote' and is part of the 'Mortgage' section. It includes a 'Mortgage Requirements' section with the following fields:

- Mortgage Reason: Purchase
- Mortgage Type: Standard (inc. Shared Equity / Help To Buy)
- Property Value: £200,000
- Loan Required: £100,000
- LTV: 50.00%
- Term: 25
- Term Type: Years
- Repayment Method: Repayment
- Source Of Deposit: Savings

Below the requirements section is a 'True Cost Calculation' section with a radio button for 'Calculate over initial period' set to 'Yes'.

## 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.

The screenshot shows the 'Opportunities' landing screen on the 360Dotnet website. It includes a search bar and a table of opportunities. The table has the following columns: Case ID, Full Names, Advisor, Opportunity Created, Opportunity Status, and Actions. The table contains one entry for Case ID 1007526, Full Names David Wressell, Advisor David Wressell, Opportunity Created 27/09/2018 02:33 PM, and Opportunity Status New Opportunity. The Actions column has a 'Start Advice Process' button.

Case ID	Full Names	Advisor	Opportunity Created	Opportunity Status	Actions
1007526	David Wressell	David Wressell	27/09/2018 02:33 PM	New Opportunity	Start Advice Process

Showing 1 to 1 of 1 entries

Opportunity Search

## 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

Powered by 360Lifecycle

Quick Quote Product Search Opportunities **In Progress** Completed 2 Contact Log off

My Fact Finds Additional Fact Finds

The following Fact Finds are currently in progress.

Show 25 entries

Edit FactFind, Invite Client, Refer or Delete

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

## 3.2.3 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.

360Dotnet

Powered by 360Lifecycle

Quick Quote Product Search Opportunities In Progress **Completed 12** Contact Log off

### Outstanding Reports

The following Fact Finds have outstanding Recommendation Reports.

Show 10 entries

Showing Fact Finds for: Scott Loveday

Search:

Case ID	Report Name	Full Names	Submission Date	Report Status	Actions
2122148	Palmer	Andy Palmer	20/01/2017 10:38 AM	Overdue	View Reopen Split Produce Report Mark Complete
2140147	Test	Aaron Test	03/02/2017 12:18 PM	Overdue	View Reopen Split Produce Report Mark Complete

**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 screenshot displays the 360 Lifecycle Online FactFind interface. At the top, a navigation bar includes tabs for 'Quick Quote', 'Product Search', 'Opportunities', 'In Progress', and 'Completed' (with a red '2' badge). A 'Log off' button is on the right. Below the navigation bar, a red banner at the top of the FactFind states: 'Please fix the problems in the highlighted fields before attempting to submit this business.' The left-hand menu is highlighted with a blue bar, and several items are marked with exclamation marks, indicating missing mandatory data. The main content area is divided into two sections: 'Advice Process' and 'Case Information'. The 'Advice Process' section includes fields for 'Creation date' (13/09/2018 09:24 AM), 'Advised type' (Advised Sale), 'Disclosure method' (IDD - Email), and 'Advice type' (Distance). The 'Case Information' section includes fields for 'Case ID' (1007526), 'Case source' (a dropdown menu), 'Salutation' (David), and 'Mailing name' (Mr David Wressell).

Missing mandatory data items highlighted at top of the FactFind

Missing mandatory data items highlighted on 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.

2974219 - Wressell

Please fix the problems in the highlighted fields before attempting to submit this business.

**Data Gathering**

- Advice Process
- Applicants
- Dependants
- Income
- Address History
- Properties
- Existing Mortgages
- Existing Policies
- Credit History
- Budget Planner (Pre)
- Bank Details

**Research**

- Life Requirements
- Life Results
- Income Protection Requirements

Convert Fact Find

View as printable PDF

**Advice Process**

Creation date: 21/11/2018 11:02 AM

Advised type: Advised Sale

Disclosure method: IDD - Email

Advice type: Distance

Lead source:

Lead type:

**Initial Disclosure Document**

Produce IDD using: Standard Terms, Amended Terms

**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.

**Advice Process**

Creation date: 18/01/2019 03:00 PM

Advised type:

Disclosure method:

Advice type:

Lead source:

Lead type:

**Initial Disclosure Document**

Produce IDD using:

**Invite Client**

If you wish, you can invite the client to fill in the information themselves. You will be informed when they have finished submitting their information, and you will have the opportunity to review that information before proceeding.

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

**Invite Client**

How would you like to send the invitation to complete the Fact Find?

Send the invitation as a Client Portal action. This will be recorded in the Client Portal in 360 Office and Advisor.

Send the client a link, by email (plus an activation code sent to their mobile phone). This will **not** be recorded in the Client Portal in 360 Office and Advisor.

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

**360Dotnet** Powered by **360LifeCycle**

Quick Quote Product Search Opportunities In Progress Completed **1** Contact Log off

**Invite Client**

Inviting the client to fill out this Fact Find will send them an email link to the **Client View** of the site, and an activation code, sent separately by text message. While the Fact Find is assigned to the client, you will not be able to edit it yourself, though you can take it back from them at any time. When the client submits the Fact Find, you will be able to complete the advice process, using the information they have provided as a basis.

**Advisor Details**

Advisor's name: David Wressell

Advisor's email: david.wressell@360lifecycle.co.uk

Advisor's SMS id: DAVID

**Client Details**

Client to invite: Hollie Skeggs

Client's name: Hollie Skeggs

Client's email: david360lc@outlook.com

Client's mobile phone: 0845 6592 360

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.

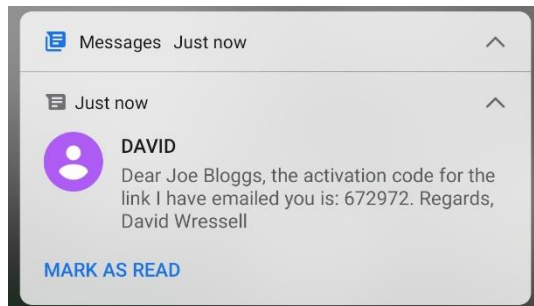
To do so, please visit the following, and fill in the requested information.

[Get Started](#)

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

Regards

David Wressell



Example of the email and text message which your client will receive

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.

[Quick Quote](#)
[Opportunities](#)
[In Progress](#)
[Completed 23](#)
[Contact](#)
[Log off](#)

## Invite Sent

The invitation was successfully sent to the client, by email and text message.

You will be informed when they have submitted their information, or you can take it back from them at any time.

Case ID	Report Name	Full Names	Fact Find Created	Fact Find Status	Actions
1599681	Factfind\Factfind	John Factfind\Susan Factfind	29/05/2015 08:28:34	With Client	<a href="#">Edit (take back from client)</a>

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.



Dear David Wressell,

This is an automated email from the 360 Fact Find system.

Mr David Wressell has finished completing their Fact Find for case ID 4362736.

The Fact Find is now assigned to you, so you can check the information that has been provided, arrange an appointment to discuss the case with the client, and complete the sale.

You can view and edit the case at the [Fact website](#).

[Edit the Fact Find](#)

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

Case ID ▾	Full Names ▾	Case Advisor ▾	Fact Find Created ▴	Fact Find Status ▾	Actions ▾			
1599681	John Factfind\Susan Factfind	DemoUser1	17/08/2016 03:51 PM	With Advisor	Edit Fact Find	Invite Client	Refer	✕

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.

The screenshot displays the 'Advisor View' interface. On the left is a vertical menu with icons and labels for various modules: Sales Process, Applicants (highlighted in blue), Dependants, Income, Address History, Properties, Existing Mortgages, Data Gathering, Advice Process, Applicants, Dependants, Initial Thoughts, Income, Address History, Properties, Existing Mortgages, Existing Policies, Savings & Investments, Liabilities, Credit History, Lifestyle Changes, Budget Planner, Protection, Mortgage Scope, Scope of Discussion, Needs & Priorities, and Bank Details.

The main content area is divided into two sections:

- Applicants:** This section shows a card for 'Johnny Factfind'. Under the 'Personal Details' header, there are input fields for 'Title' (set to 'Mr') and 'Forename' (set to 'John'). An arrow points to a small upward arrow icon in the top right corner of the card, with the text 'Open or collapse a row from here'.
- Protection Needs & Shortfalls:** This section shows a card for 'David Wressell'. It is divided into 'Lump Sum' and 'Regular Income' sections.
  - Lump Sum:** Contains a table with columns for 'Death' and 'Critical Illness'. Rows include 'Total borrowing when this transaction completes (including main mortgage)', 'Existing protection', and 'Shortfall'. The 'Shortfall' row is greyed out.
  - Regular Income:** Contains a table with a column for 'Ongoing Illness'. Rows include 'New mortgage', 'Fixed expenditure', 'Discretionary and other expenditure', and 'Existing protection'. The 'New mortgage' and 'Fixed expenditure' rows are greyed out.
 An arrow points to the greyed-out 'Shortfall' field with the text 'Greyed out fields are 'Read Only' and are populated from other fields'.

### 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.

Factfind\Factfind

Please fix the problems in the highlighted fields before attempting to submit this business.

**Mortgage Requirements**

Property Purchase Standard Repayment - £270,000.00

**Applicant Details**

Applicants: x Johnny Factfind x Susan Factfind

First Applicant Type: No Selection

Second Applicant Type: No Selection

**Mortgage Details**

Mortgage Reason: Purchase

Mortgage Type: Standard

Repayment Method: Repayment

Source Of Deposit: Savings

Property Value: £300,000.00

Loan Required: £270,000.00

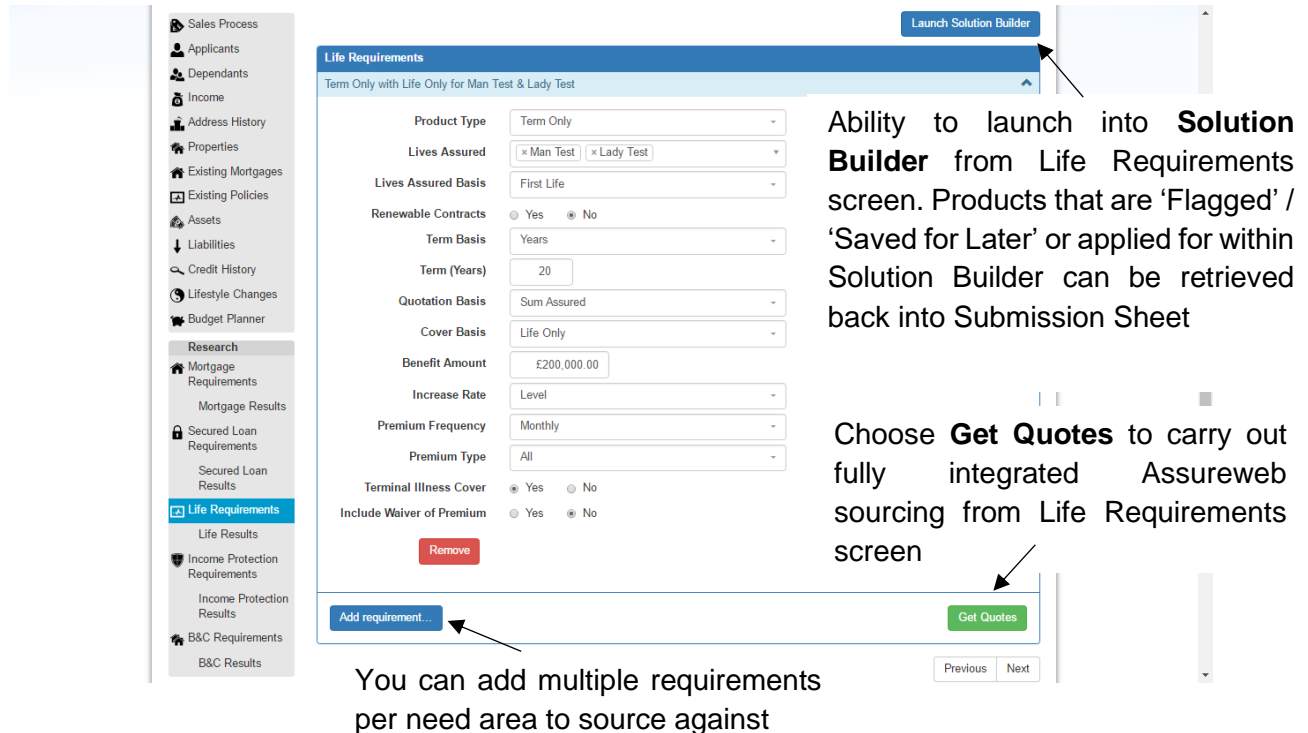
LTV: 90.00%

Term: The Term field is required.

Left-hand menu items: Sales Process, Applicants, Dependants, Income, Address History, Properties, Existing Mortgages, Existing Policies, Assets, Liabilities, Credit History, Lifestyle Changes, Budget Planner, **Mortgage Requirements** (highlighted with red exclamation mark), Mortgage Results, Life Requirements, Life Results, Income Protection Requirements.

Any mandatory information which is missing will be displayed in 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

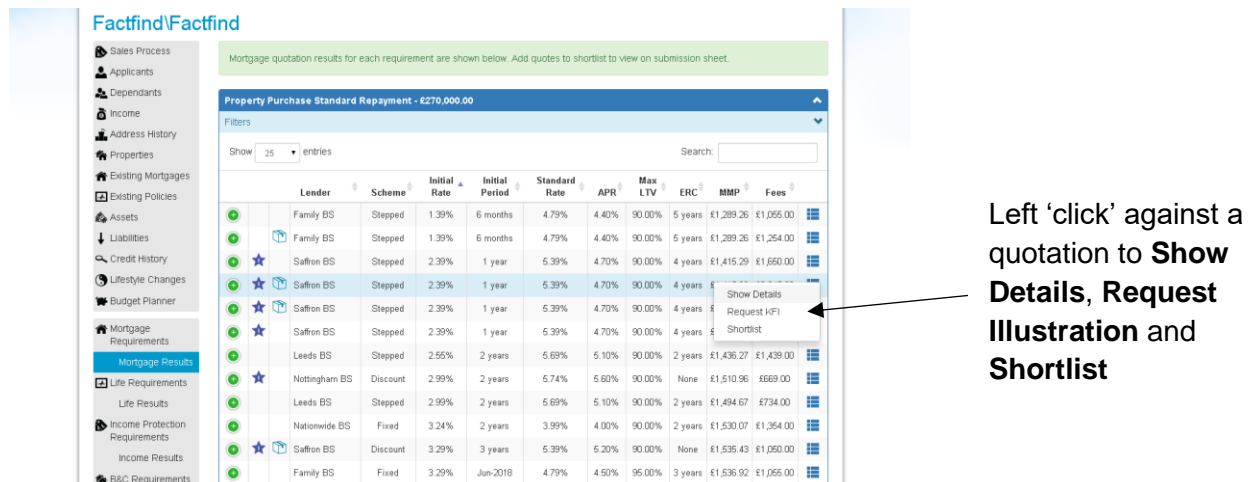
Choose **Get Quotes** to carry out fully integrated Assureweb sourcing from Life Requirements screen

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'**.

The screenshot displays the 'Factfind\Factfind' section of the application. A sidebar on the left contains a navigation menu with options like 'Sales Process', 'Applicants', 'Dependants', 'Income', 'Address History', 'Properties', 'Existing Mortgages', 'Existing Policies', 'Assets', 'Liabilities', 'Credit History', 'Lifestyle Changes', 'Budget Planner', 'Mortgage Requirements', 'Mortgage Results', 'Life Requirements', 'Income Protection Requirements', 'Income Results', and 'BPP Requirements'. The 'Life Results' option is currently selected.

At the top, a navigation bar includes 'Quick Quote', 'Opportunities', 'In Progress', 'Completed' (with a red badge showing '23'), 'Factfind\Factfind' (highlighted), 'Client View', 'Contact', and 'Log off'.

Below the navigation bar, a green banner states: 'Life quotation results for each requirement are shown below. Add quotes to shortlist to view on'. A blue header reads 'Term Only with Life Only for Johnny Factfind'.

Below the header, there are two tabs: 'Results' and 'Providers Not Quoting' (with a red badge showing '19'). A 'Show' dropdown is set to '25' entries. A search box is labeled 'Search:'. An arrow points to this search box with the text 'Search for a particular product or provider'.

The main content is a table of quotations. The columns are: Provider, Product, Sum Assured, Premium, Renewal, Waiver To Age, Premium Type, Commission, and Expires. The table lists several quotations from providers like AIG, Aviva, and Legal & General. An arrow points to the column headers with the text 'Sort quotations by any of the column headers'.

Provider	Product	Sum Assured	Premium	Renewal	Waiver To Age	Premium Type	Commission	Expires
AIG	AIG Low Start Term	£250,000.00	£9.44		70	Guaranteed	£218.59	30/06/2015
Aviva	Aviva Life Insurance Options	£250,000.00	£15.32		70	Guaranteed	£358.19	29/06/
Legal & General	Legal & General Level Term Assurance (Electronic)	£250,000.00	£15.35		Expiry	Guaranteed	£319.39	30/06/
Legal & General	Legal & General Level Term Assurance (Paper)	£250,000.00	£15.35		Expiry	Guaranteed	£300.55	30/06/
Legal & General	Legal & General Mortgage Term Assurance (Electronic)	£250,000.00	£15.35		Expiry	Guaranteed	£319.39	30/06/2015
Legal & General	Legal & General Mortgage Term Assurance (Paper)	£250,000.00	£15.35		Expiry	Guaranteed	£300.55	30/06/2015
Legal & General	Legal & General Multi	£250,000.00	£15.35		Expiry	Guaranteed	£319.39	30/06/2015

### 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 immediate 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 to 'Shortlist'

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

Request Illustration

Chosen ☐

Remove

- 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 immediate 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 relevant 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 screen shots below). Any Quotations for which you select as ‘Chosen’ can visible through colour coding.
- Remove – Remove from the shortlisted Quotations.

The screenshot displays the Factfind\Factfind application interface. The top navigation bar includes links for Quick Quote, Opportunities, In Progress, Completed (23), Factfind\Factfind, Client View, Contact, and Log off. The left sidebar lists various modules such as Sales Process, Applicants, Dependents, Income, Address History, Properties, Existing Mortgages, Existing Policies, Assets, Liabilities, Credit History, Lifestyle Changes, Budget Planner, Mortgage Requirements, Mortgage Results, Life Requirements, Life Results, Income Protection Requirements, and Income Results.

The main content area shows two shortlist tables. The first table is titled 'Mortgage Shortlist' and displays a 'Property Purchase Standard Repayment - £270,000.00'. It includes a search bar and a table with columns: Lender, Scheme, Initial Rate, Initial Period, Std Rate, APR, Max.LTV, ERC, MMP, Fees, and True Cost. The table contains one entry for 'Nationwide BS' with a fixed rate of 3.24% and an initial period of 2 years. The second table is titled 'Life Protection Shortlist' and displays 'Term Only with Life Only for Johnny Factfind'. It includes a search bar and a table with columns: Provider, Product, Sum Assured, Premium, Type, Waiver To Age, Term, Commission, and Expires. The table contains one entry for 'Aviva' with a sum assured of £250,000.00 and a premium of £15.32.

A callout box with an arrow points to the 'Chosen' checkbox in the Mortgage Shortlist table, stating: "Chosen Quotations will be visible through colour coding".

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

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.

**Solution Builder Quotes**

Retrieve Quotes

Products Applied For

No products have been applied for using Solution Builder.

Solutions Liked

**Man Test, Lady Test - Multi Provider** £43.92

**Zurich Level Protection Plan** £9.36

Level Term, Term 20 years, Cover type Life & CIC, Benefit amount £210000

Apply Not Chosen Chosen

**Cirencester Friendly Income Assured Plus (Pure)** £34.56

Income Protection, To age 65, Benefit amount £20000, Deferred period Three

Apply Not Chosen Chosen

Life Pro

Income

Submission Sheet

Documents

Submit Business

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.

Navigate to the required need / product area and then choose **Add**

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 reopen 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

Name	Tag	Created
Mortgage KFI		01/06/2015 14:24:53
Mortgage KFI		01/06/2015 12:39:05
Life Insurance Sourcing Results		31/05/2015 17:57:01
Mortgage Sourcing Results		31/05/2015 17:56:48
Mortgage KFI		31/05/2015 17:53:21
Initial Disclosure Document		29/05/2015 12:58:51

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.

## 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**



**Factfind\Factfind**

**Documents**

Name	Tag	Created
Life Insurance Requirement Shortlist	Life Policy - Johnny Factfind - LTA	02/06/2015 19:44:40
Mortgage Requirement Shortlist	Mortgage - Johnny Factfind & Susan Factfind - 7...	01/06/2015 14:16:47
Life Insurance Requirement Shortlist		01/06/2015 12:16:36
Mortgage Requirement Shortlist		01/06/2015 12:11:56
Product Key Features - Key Features of M...	Life Policy - Johnny Factfind - LTA	31/05/2015 17:57:00
Product Key Features - Critical Illness Insu...	Life Policy - Johnny Factfind - LTA	31/05/2015 17:57:00
Product Key Features - Critical Illness Insu...	Life Policy - Johnny Factfind - LTA	31/05/2015 17:56:59
Product Key Features - Life Insurance Opti...	Life Policy - Johnny Factfind - LTA	31/05/2015 17:56:59
Product Key Features - Life Insurance Opti...	Life Policy - Johnny Factfind - LTA	31/05/2015 17:56:59
Client Specific Illustration - Life	Life Policy - Johnny Factfind - LTA	31/05/2015 17:56:59

**Upload Documents**

Select folder: Case ☐ Opportunity ☒ Sale ☐

Browse...

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.

**Factfind\Factfind**

**Notes**

You can add notes to any page using the Add Note button. Whichever page they are added on, notes are also shown here.

Date	Stage	Note
02/06/2015	Documents	Notes Go Here & Can Be Entered Against Any Page Within Fact Find
02/06/2015	Documents	Another Note
02/06/2015	Sales Process	Note On Sales Process Screen

**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 successfully Submit Business from the colour coding on left hand process menu.

**Submit Business**

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.

Submitting business will prevent any further changes to this fact find.

Do you want to continue?

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.

Quick Quote Product Search Opportunities In Progress **Completed 12** Contact Log off

### Outstanding Reports

The following Fact Finds have outstanding Recommendation Reports.

Show  entries

Showing Fact Finds for:  Search:

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	<input type="button" value="View"/> <input type="button" value="Reopen"/> <input type="button" value="Split"/> <input type="button" value="Produce Report"/> <input type="button" value="Mark Complete"/>

- 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 outside 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 updates to the client Personal Details and a new sale event created with the 'Chosen' policy records

Case ID - 2974219

Client Portal

Portfolio

Assets

Protection

Financial Commitments

Life Sales Opportunity

Website

LTA (Mr David Wressell)

Accident & Sickness (Mr David Wressell)

General

General

General

General

Website

Mr David Wressell (30-Dec-92)

TBA

Change Address

Export Case

Untracked Emails

Client Details

Case Details

Contact History

Documents

Reviews

Client Circumstances

Client Details

Client Type

Retail Client

Title

Mr

Forename

David

Middle Names

Surname

Wressell

D.O.B.

30/12/1992

Sex

Male

Contact Details

Home

Work

Mobile

07737310835

Email

david.wressell@360lifecycc

Client has no Email Address

☐

Additional Information

Occupation

NI Number

Status

Contractor

Income

£0.00

Smoker

No

Dependants

0

Remove Duplicates

9 Potential duplicate records found for David

Add Client

Remove Client

FullName	Age	Home Phone	Work Phone	Mobile Phone	Email
Mr David Wressell	26			07737310835	david.wressell@360lifecy...

Data Privacy Settings

View/Edit Permissions

Privacy Portal Request

- Any existing arrangements will be added to the **'Portfolio'** section of the case record.

**Case ID - 2974219**

**Client Portal**

**Portfolio**

- Assets
  - Properties, Savings, Investments and Pensions
- Protection
  - Life, Income and B & C
- Financial Commitments
  - Mortgages and Other Commitments
- Life Sales Opportunity
  - David Wressell (21/11/2018)
- Website
  - Advised Sale (21/11/2018)
  - LTA (Mr David Wressell)
    - Abbey Life, On Risk
  - Accident & Sickness (Mr David Wressell)
    - Aegon Scottish Equitable, Accepted
- General
  - David Wressell (04/09/2018)
- General
  - David Wressell (04/09/2018)
- General
  - David Wressell (04/09/2018)
- Website
  - David Wressell (04/09/2018)

**Life Policies** | **Income Protection** | **Building And Contents**

**Add Policy**

Owner: Mr David Wressell | Policy Number: | Provider: Abbey Life | Start Date: | Policy Type: LTA | Term (years): 20 | Life Assured: Mr David Wressell | Guaranteed/Reviewable: ☒ N/A ☐ Guaranteed ☐ Reviewable | Sum Assured: £100,000 | Waiver of Premium: ☐ | CTC/SIC Cover: £0 | Purpose: Family | Benefit Type: | In Trust: ☐ | Premium: £4.09 | Review Agreed: ☐ | Premium Frequency: Monthly | Review Date: |

Owner: Mr David Wressell | Policy Number: | Provider: | Start Date: 03/09/2018 | Policy Type: LTA + CIC | Term (years): 0 | Life Assured: Mr David Wressell | Guaranteed/Reviewable: ☒ N/A ☐ Guaranteed ☐ Reviewable | Sum Assured: £100,000 | Waiver of Premium: ☐ | CTC/SIC Cover: £10,000 | Purpose: | Benefit Type: | In Trust: ☐ | Premium: £10.00 | Review Agreed: ☐ | Premium Frequency: Monthly | Review Date: |

- 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.

**Case ID - 2974219**

**Client Portal**

**Portfolio**

- Assets
  - Properties, Savings, Investments and Pensions
- Protection
  - Life, Income and B & C
- Financial Commitments
  - Mortgages and Other Commitments
- Life Sales Opportunity
  - David Wressell (21/11/2018)
- Website
  - Advised Sale (21/11/2018)
  - LTA (Mr David Wressell)
    - Abbey Life, On Risk
  - Accident & Sickness (Mr David Wressell)
    - Aegon Scottish Equitable, Accepted
- General
  - David Wressell (04/09/2018)
- General
  - David Wressell (04/09/2018)
- General
  - David Wressell (04/09/2018)
- Website
  - David Wressell (04/09/2018)

Mr David Wressell (30-Dec-92) | TBA

**Event Details** | **Notes** | **Tasks** | **Documents** | **Commission & Payments**

Filter Documents: Advised Sale (21/11/2018) | View: Details | Add Documents

Advised Sale (21/11/2018) | Show Search

Name	Modified by	Date modified	Created by	Date created
Comparison Summary	David Wressell	21/11/2018 10:54	David Wressell	02/10/2018 13:36
Client Specific Illustr...	David Wressell	21/11/2018 10:54	David Wressell	02/10/2018 13:37
Product Key Featur...	David Wressell	21/11/2018 10:54	David Wressell	02/10/2018 13:37
Online Fact Find	David Wressell	21/11/2018 10:54	David Wressell	21/11/2018 10:54
Budget Planner Doc...	David Wressell	21/11/2018 10:54	David Wressell	21/11/2018 10:54
360 Accounts	David Wressell	21/11/2018 14:16	David Wressell	21/11/2018 14:16
Nov Template	David Wressell	14/01/2019 11:26	David Wressell	14/01/2019 11:26

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**

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

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

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.

Recommendation Report for Mr J & Mrs S Factfind

Paragraph Selection

Select the paragraphs you would like to include in the recommendation report.

Description	Included
Introduction	No Yes
Introduction - First Time Buyer	No Yes
Introduction - Purchase	No Yes
Remortgage - Reason	No Yes
Income & Expenditure	No Yes
Term of Mortgage	No Yes
Mortgage Type - Introduction	No Yes
Mortgage Type - Fixed	No Yes
Features & Preferences	No Yes
Personal Circumstances	No Yes

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'.

Joint Liability	No	Yes
Next Steps	No	Yes
Solicitors	No	Yes
Existing Protection	No	Yes
Needs - Protection	No	Yes
Needs - Income Protection	No	Yes
Total Premium	No	Yes
Replacement Policies	No	Yes
Documentation / Next Steps	No	Yes
Will	No	Yes
Signature Box - Joint	No	Yes

**Produce Report** once all necessary paragraphs are in scope

[View Fact Find](#) [Produce Report](#)

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The fully editable Recommendation Report will then be launched.

## 360Dotnet

Powered by 360LifeCycle

[Quick Quote](#)
[Product Search](#)
[Opportunities](#)
[In Progress](#)
[Completed 13](#)
[Contact](#)
[Log off](#)

### Recommendation Report for Test Client

File

Home

Insert

Page Layout

View

Tahoma

11

A Aa

B I U S X<sup>4</sup> X<sub>2</sub>

Font

Normal

Heading...

Heading...

Subtitle

Find

Replace

Select All

Undo

Clipboard

Factfind & Mrs Susan Factfind

Link

Business Park

Leicester

LE19 1XW

4th April 2017

Your reference: 1599681

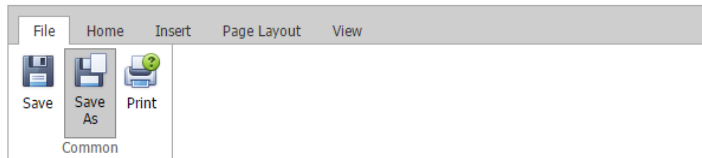
Dear John & Susan

Following our recent meetings / telephone conversations, I am writing to thank you for using Account Manager Demo Brand and to confirm the advice I have provided. Firstly, I would like to confirm that during the meeting, I provided you with disclosure about our services and charges.

Summary of Discussions

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

## Recommendation Report for Test Client



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.

**Complete to generate the finalised report**

Use the scroll bar to navigate the Report

View Fact Find   Restart   **Complete**

**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.

Once completed, you will be no longer be able to edit this recommendation report.

Do you want to continue?

No   Yes

Selecting **'Yes'** to the completion will upload a copy of the Recommendation Report to the Documents section of the 'master' 360 Lifecycle 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

## Completed Reports

The following Fact Finds have been completed, including their Recommendation Report.

Show 10 entries

Search:

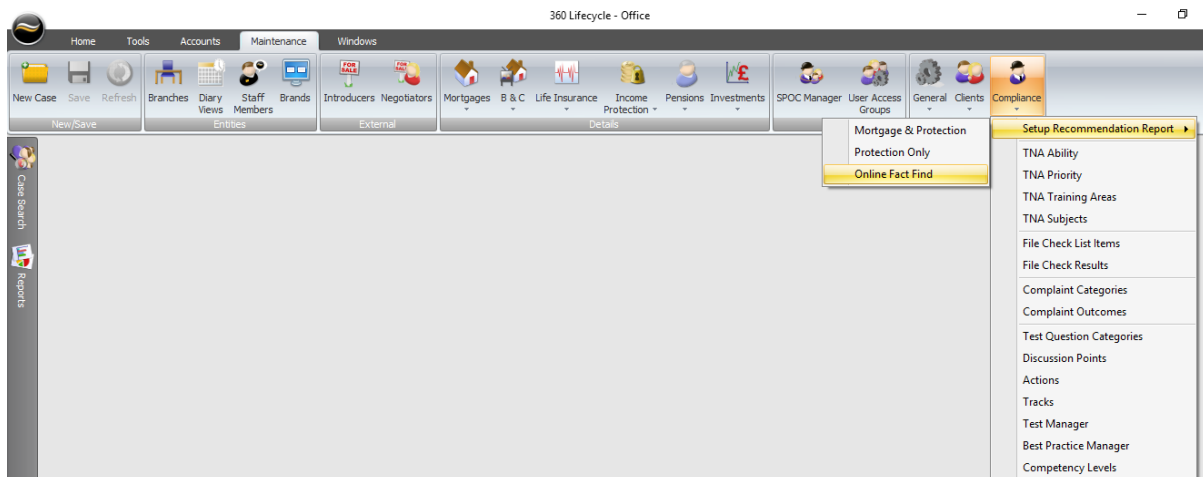
Case ID	Report Name	Full Names	Submission Date	Completion Date	Actions
1599681	Factfind\Factfind	John Factfind\Susan Factfind	17/08/2016 04:23 PM	17/08/2016 04:35 PM	<a href="#">View</a> <a href="#">Reopen</a> <a href="#">Split</a> <a href="#">Download Report</a>

## 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 Recommendation Report Template. The Recommendation Report Template can be accessed by logging into 360 Lifecycle 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

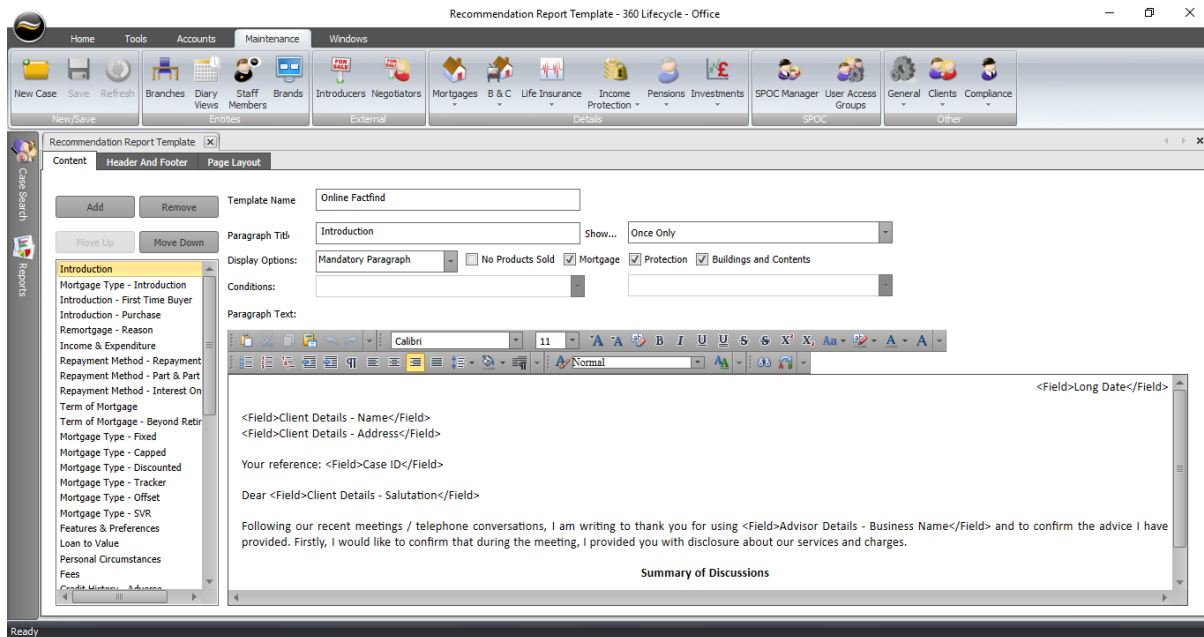
Login to 360 Lifecycle Office from the shortcut on your Desktop. Once 360 Lifecycle has opened click onto the 'Maintenance' tab to access 'Compliance'. From here choose 'Setup Recommendation Report' and select '**Online FactFind**'.



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.

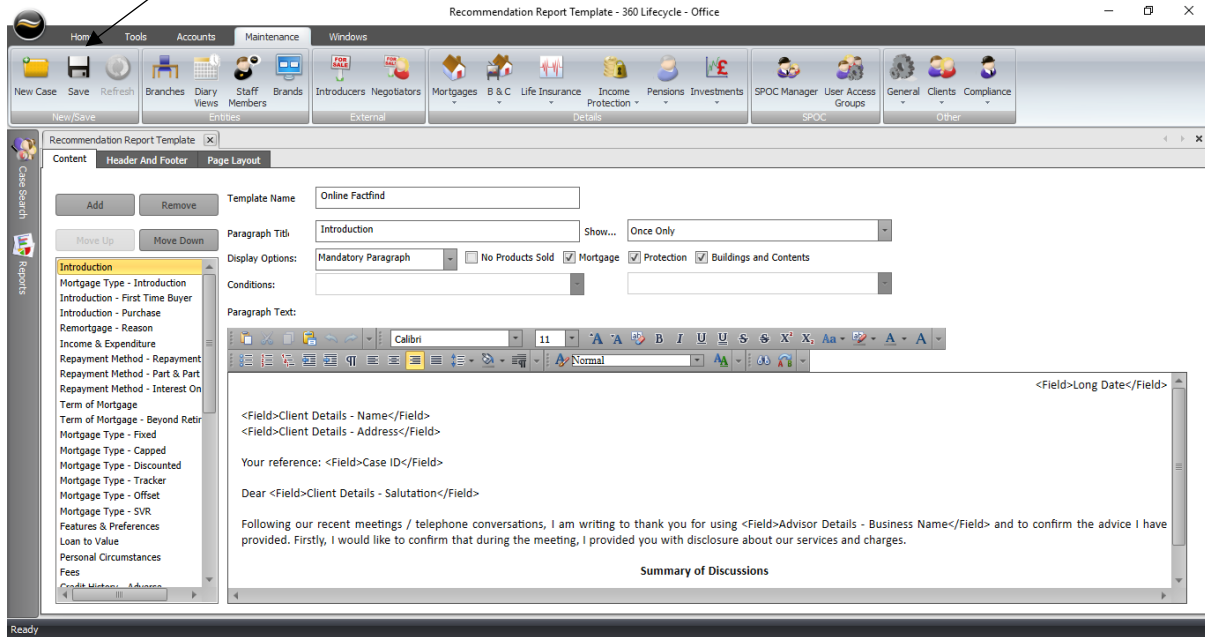




## 9.2 Amending Recommendation Report Content

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

Template Name:

Paragraph Title:  Show...:

Display Options:  ☐ No Products Sold ☒ Mortgage ☐ Protection ☐ Buildings and Contents

Conditions:

Paragraph Text:

Calibri 11

Normal

You told me that you would like the stability of having payments that would not be subject to change for a period of time. You are aware that although your payments will not rise during the fixed rate period, if interest rates go down, you would not benefit from lower payments. You are also aware that the fixed rate will end after a period of time, and I have recommended <Personalise>Justify Term e.g. a 3 year deal because....</Personalise>

- 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....

Paragraph Text:

Property	<Field>Address Line 1</Field>
Lender	<Field>Lender Name</Field>
Loan Amount	<Field>Loan Amount</Field> plus <Field>Mortgage Lender Fee</Field> to be added to the loan
Term	<Field>Mortgage Term</Field>
Payment	<Field>Monthly Payment</Field>
Initial Rate	<Field>Initial Rate</Field>

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.

Recommendation Report Template - 360 Lifecycle - Office

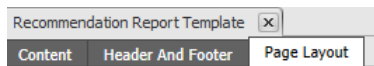
Header

<Field>Branding Image</Field>

Footer

Ready

## 9.4 Page Layout



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

### Margins

Left  Inches

Right  Inches

Top  Inches

Bottom  Inches

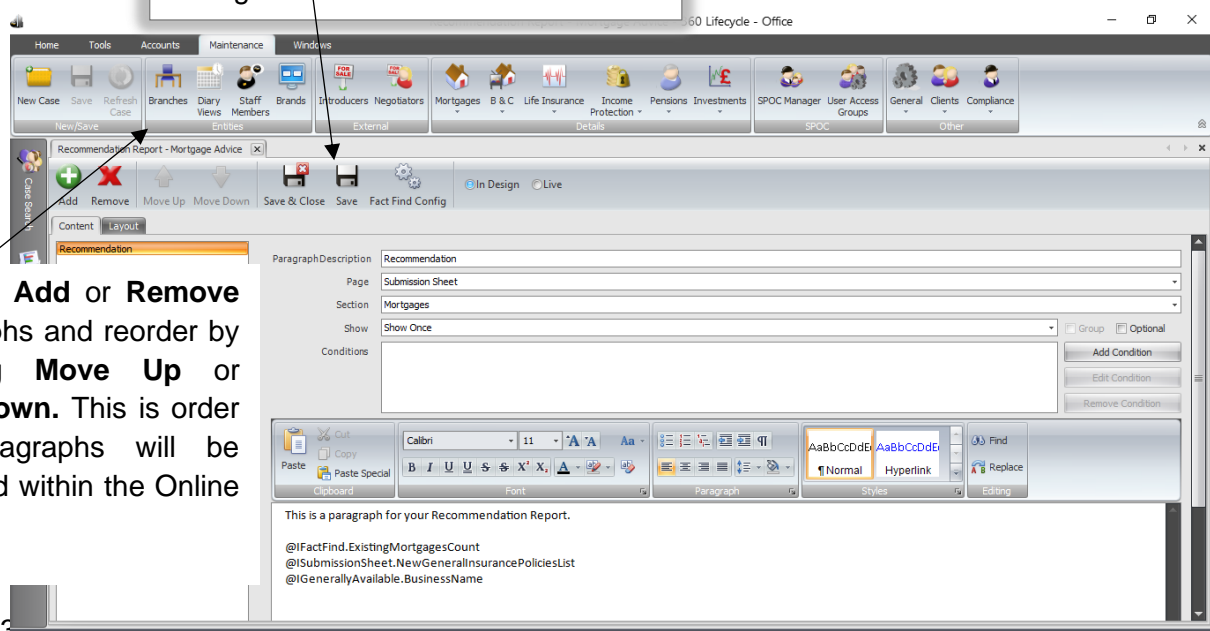
## 9.5 Amending Recommendation Report Content with the 'Report per FactFind Template' Editor

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

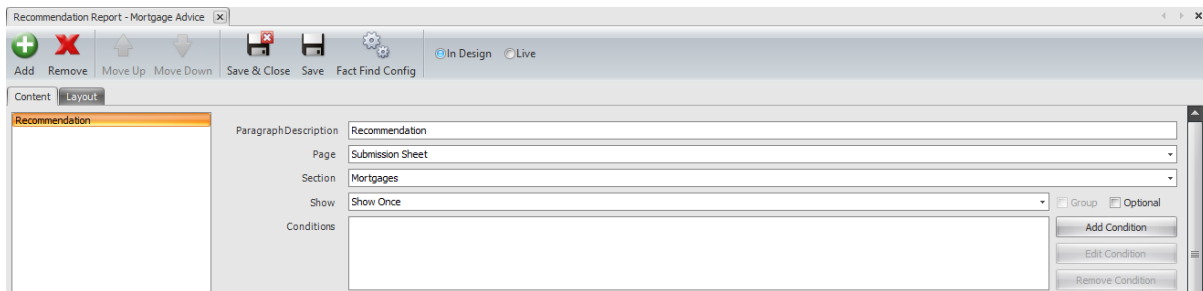
The Content tab will provide you with access to create, remove and re-order any recommendation paragraphs. Each paragraph will have its own **'Title'** and associated wording which is then displayed when producing the report within Online FactFind. Paragraphs can be set to show as **'Once Only'** or 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.

Paragraph Text:

Recommendation  
In order to reach my recommendation, I have considered the above Needs and Preferences and compared this to what is available in the market. I am pleased to recommend the following mortgage(s).

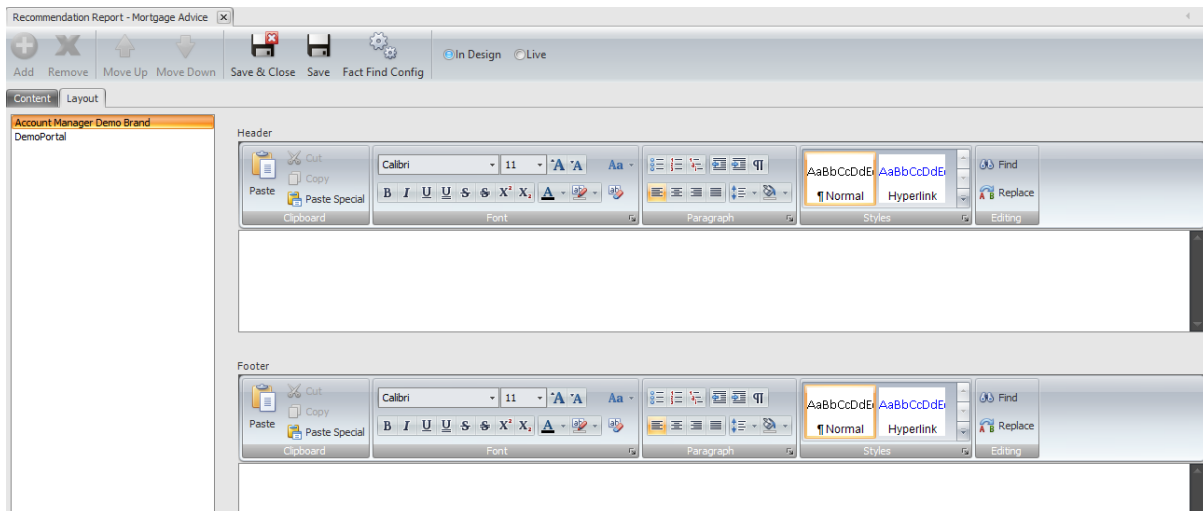
Proposed Mortgage	
Property	<Field>Address Line 1</Field>
Lender	<Field>Lender Name</Field>
Loan Amount	<Field>Loan Amount</Field> plus <Field>Mortgage Lender Fee</Field> to be added to the loan
Term	<Field>Mortgage Term</Field>
Payment	<Field>Monthly Payment</Field>
Initial Rate	<Field>Initial Rate</Field>

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.

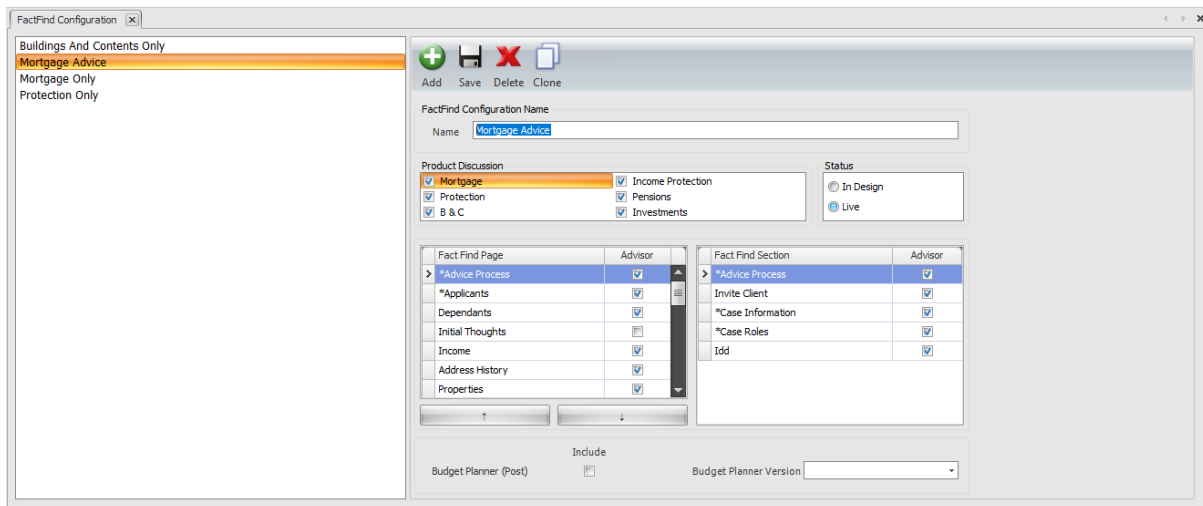
### 10.1 Adding, Amending and Removing FactFinds

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 be 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 being 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.