

Some common questions we are asked...

- When do I reopen a factfind?
 - Only when the original application has fallen through and/or needs resourcing.
 - For a completely new bit of business a new factfind should be created.

Completed Reports

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

Show entries

Search:

Case ID ▾	Report Name ▴	Full Names ▴	Submission Date ▴	Completion Date ▴	Actions ▴			
2974488 📞	Demo\Demo	Factfind Demo\Advisor Demo	07/09/2018 09:32 PM	10/09/2018 11:21 AM	View	Archive	Split	Download Report
3170848 📞	Flintstone\Rubble	Fred Flintstone\Barney Rubble	28/01/2019 03:29 PM	28/01/2019 03:29 PM	View	Reopen	Split	Download Report
3170968 📞	Nesbit	John Nesbit	28/01/2019 04:09 PM	28/01/2019 04:10 PM	View	Reopen	Split	Download Report

Some common questions we are asked...

- Why can I only 'Archive' a fact find not 'Reopen'?
 - Fact finds can only be reopened once, otherwise a new fact find is then created.

Completed Reports

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

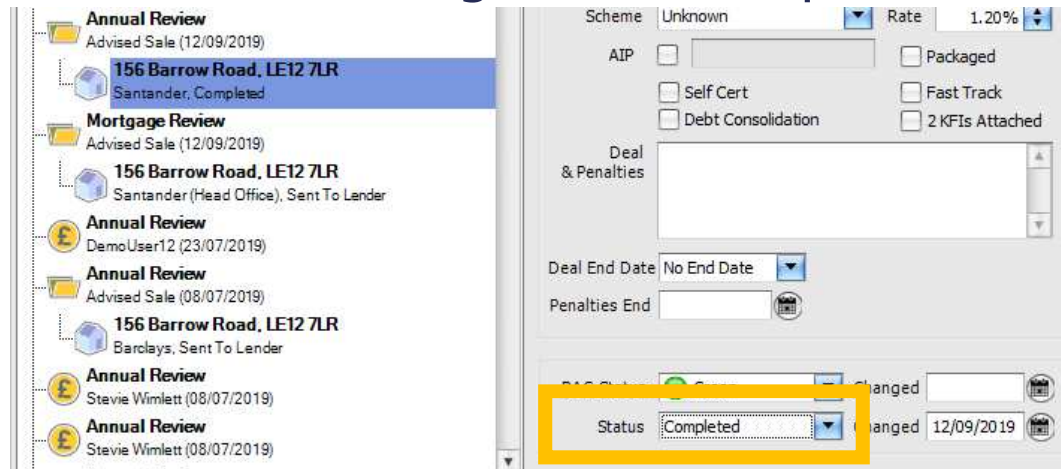
Show entries

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3170968 📞	Nesbit	John Nesbit	28/01/2019 04:09 PM	28/01/2019 04:10 PM	View	Reopen	Split	Download Report

Some common questions we are asked...

- I've previously done a factfind for a client but their information isn't pulling through to the new one.
 - Budget planner info – saved for 30 days from date of previous factfind creation.
 - Existing policies are status driven – you need to ensure product status are changed to 'Completed' or 'On Risk'



The screenshot displays a software interface for policy management. On the left, a list of policies is shown, including 'Annual Review' and 'Mortgage Review' for '156 Barrow Road, LE12 7LR'. The right pane shows the details for a selected policy. The 'Status' dropdown menu is highlighted with a yellow box, showing 'Completed' as the selected option. Other fields visible include 'Scheme: Unknown', 'Rate: 1.20%', 'AIP', 'Packaged', 'Self Cert', 'Fast Track', 'Debt Consolidation', '2 KFIs Attached', 'Deal & Penalties', 'Deal End Date: No End Date', and 'Penalties End'.

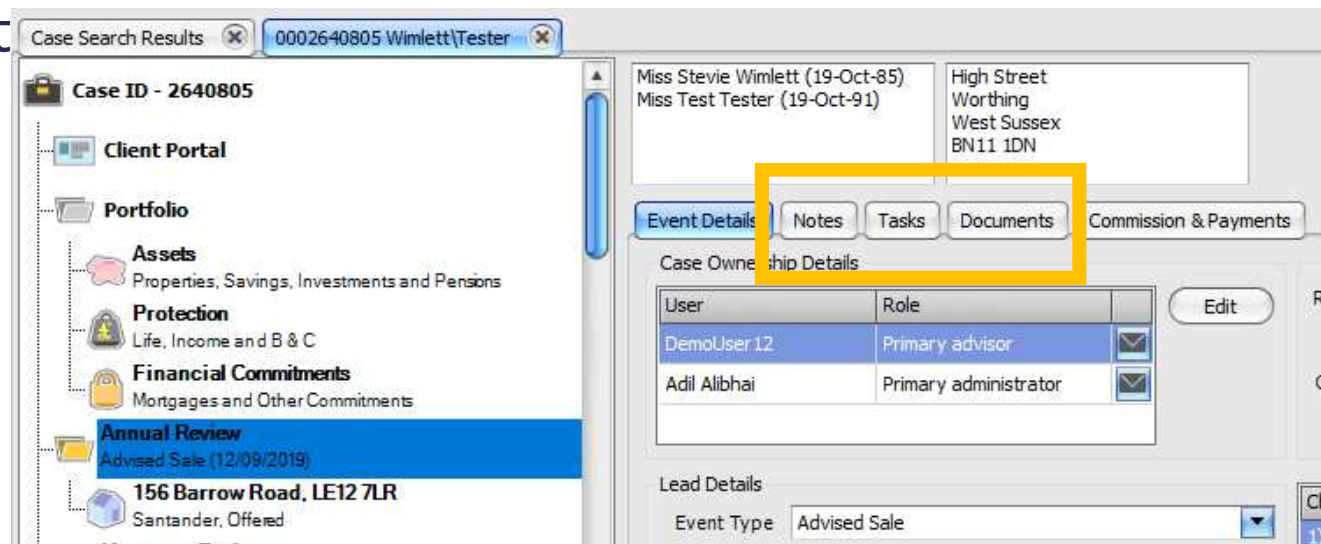
Some common questions we are asked...

- Why can't I see another advisors factfind?
 - You can only see your own in progress factfinds. If access to another fact find is required it needs to be 'Referred' to you.

Quick Quote	Product Search	Opportunities	In Progress	Completed 114	Contact	Log off
My Fact Finds	Additional Fact Finds					
The following Fact Finds are currently in progress:						
Show	25	entries			Search:	
Case ID	Full Names	Case Advisors	Fact Find Created	Fact Find Status	Actions	
3483194	kir sunn	DemoUser12	12/09/2019 11:34 AM	With Advisor	Edit Fact Find	Refer
2901634	Dani Moll	DemoUser12	20/08/2019 11:00 AM	With Advisor	Edit Fact Find	Refer
3424925	Stevie 360Test	DemoUser12	07/08/2019 03:38 PM	With Advisor	Edit Fact Find	Refer
3424925	Stevie 360Test	DemoUser12	07/08/2019 11:26 AM	With Advisor	Edit Fact Find	Refer
3432192	Rob Clare	DemoUser12	31/07/2019 12:13 PM	With Advisor	Edit Fact Find	Refer
3283090	Robert Clare	DemoUser12	24/07/2019 02:30 PM	With Advisor	Edit Fact Find	Refer

Some common questions we are asked...

- I've submitted my fact find but need to upload some more documents/add a note? Where do I go?
 - Open up the case record in either 360 Advisor or Office.
 - Click on the 'Sale Event' and then select the Document or Note



Some common questions we are asked...

- Why can't I view other peoples hotboxes in 360 Advisor?
 - 360 Advisor contains only your own hotbox. You can view others (permissions allowed) through Performance Explorer in 360 Office.

