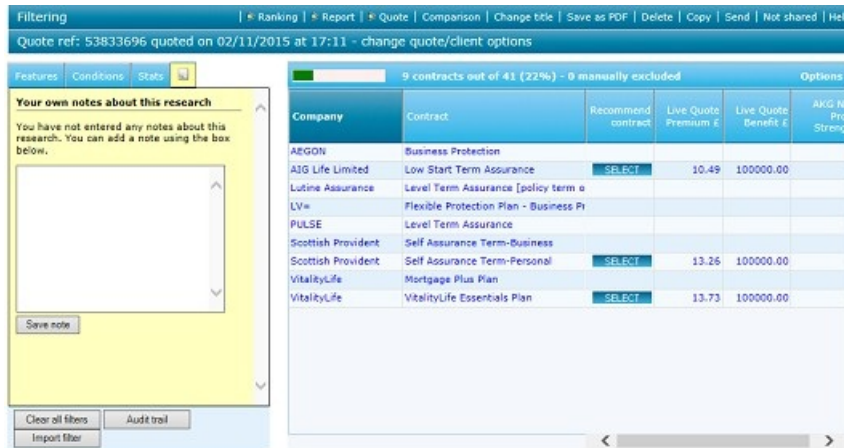


Can I record notes on research?

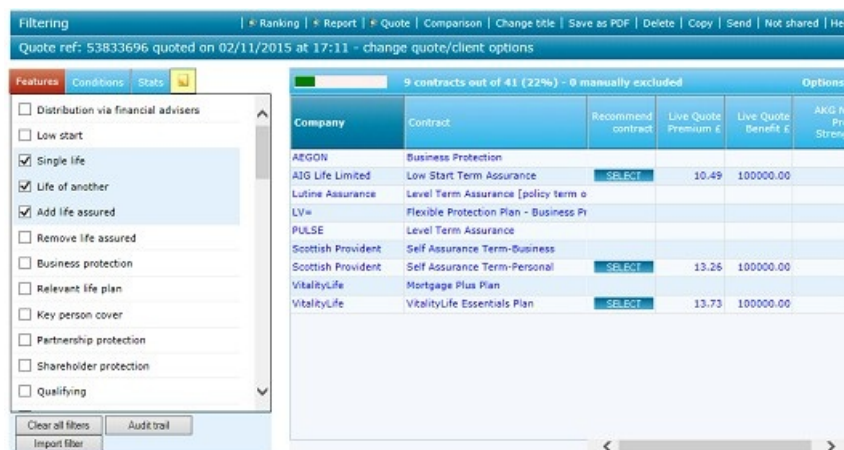
Last Modified on 10/01/2024 12:36 pm GMT

You can record notes about your research to remind you of key points, or to act as a to-do list. The note entry form is displayed as an extra tab above the list of fields, and is illustrated by the first screenshot below.



You simply enter text into the box and click on the **Save note** button.

Once notes have been entered for a piece of research the icon for the notes tab changes colour from grey to yellow. This is illustrated by the second screenshot, and provides an immediate indication when you open a piece of research of whether a note has been recorded.



Notes are displayed in reverse chronological order – i.e. most recent first. You can delete notes by clicking on the cross icon in the header for the note, to the left of the text describing who created the note and when. This is illustrated by the third screenshot.

Filtering | * Ranking | * Report | * Quote | Comparison | Change title | Save as PDF | Delete | Copy | Send | Not shared | Help

Quote ref: 53833696 quoted on 02/11/2015 at 17:11 - change quote/client options

Features | Conditions | Stats

Created by you on 4 November 2015

TEST

New note....

Clear all filters | Audit trail | Import filter

9 contracts out of 41 (22%) - 0 manually excluded

Company	Contract	Recommend contract	Live Quote Premium £	Live Quote Benefit £	AKG No Prof Strength
AEGON	Business Protection				
AIG Life Limited	Low Start Term Assurance	SELECT	10.49	100000.00	
Lutine Assurance	Level Term Assurance [policy term o				
LV=	Flexible Protection Plan - Business Pr				
PULSE	Level Term Assurance				
Scottish Provident	Self Assurance Term-Business				
Scottish Provident	Self Assurance Term-Personal	SELECT	13.26	100000.00	
VitalityLife	Mortgage Plus Plan				
VitalityLife	VitalityLife Essentials Plan	SELECT	13.73	100000.00	

New notes can be added either by using the **new note** link which is displayed at the bottom of the list, or using the icon which is shown in the header of the first note (next to the Delete note icon).

You also have the option of adding a note when sending research to another user. The recipient of your research can see all the notes you have entered, but cannot delete them. Similarly, you cannot delete notes which other users have created.

Enter report information | Back to report selection | Back to ranking | Back to filtering | Help

This report template contains fields which need to be completed based on information from the client's fact-find. You can either download the basic report template and then edit it manually, or you can complete some of the information on this screen before generating the report.

If you are using Word 97 or lower please click here

Download basic template

Costs and Services documentation

- Advisers own material
- CIDD
- SCDD

Marital Status

- Married
- Single
- Divorced
- Separated
- Widowed

Living with

- Married

Create complete report

Once again, your browser will then ask you whether to save the document on your hard disk or open it directly in Microsoft Word.