DASH

USER GUIDE

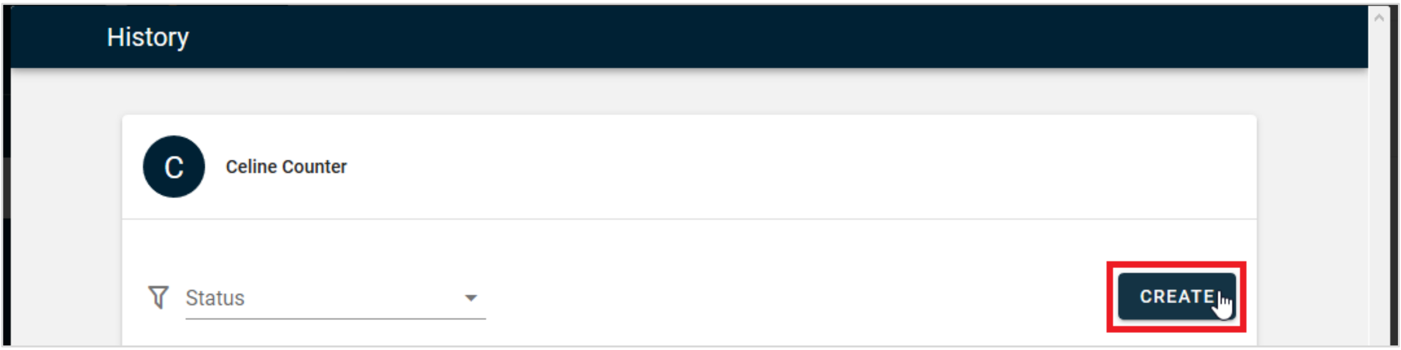
DYNAMICDOCS GUIDE

Contents

1 Creating a Dynamic SOA

Prior to using the DynamicDocs app, you will need to have generated an SOA in DASH. You should also do any editing that is required prior to using the DynamicDocs app.

Similar the DASH Fact Find and SOA Wizard, you will need to launch the app from within a contact. In the DynamicDocs app, you will be able to create a Dynamic Document by clicking on the **CREATE** button.



This will open the 'Create Dynamic Document' overlay where you will be able to create the Dynamic Document. You will need to add a **Name**, **Description** and specify the **Theme** and **Source** that will form the foundation of the Dynamic Document.

Theme

Theme is a drop-down option which is where you will be able to select a theme that will be used for the Dynamic Document you are creating. Themes essentially control what sections are mandatory within the DynamicDoc and will prompt clients for confirmation before they are able to move on to reading another section in a DynamicDoc.

Source

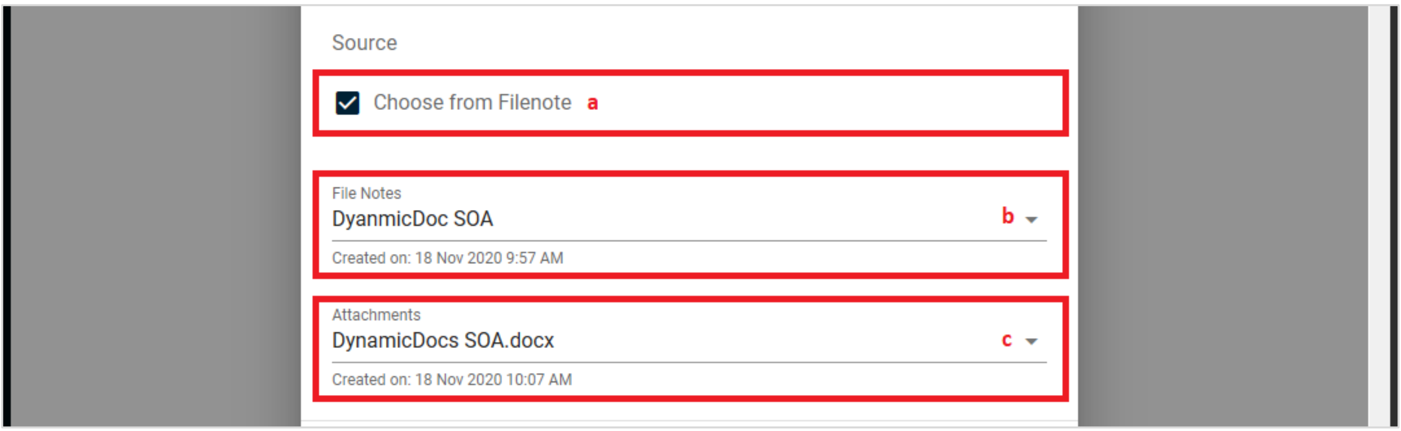
Source is where you will be able to specify the source document that will form the basis of the Dynamic Document. There are two options for source, from Filenote and from your Files. Please refer below for more information regarding each option.

<u>From File Note</u>

If the source document is from the client's file note, you will need to click on the **Choose from Filenote** checkbox (**a**). Clicking on the checkbox change the source options from 'Upload file' to 'File Notes' and 'Attachments'.

If the source of the Dynamic Document is from the client's file note, click on the **File Notes** drop-down and then select the subject which contains the SOA you want to use as the source document (**b**).

Once a File Note has been specified, click on the **Attachments** drop-down which will display a list (arranged from newest to oldest) of attachments contained within the file note specified. You will need to select the appropriate document which will be used to form the basis of the Dynamic Document (**c**).



From File Note

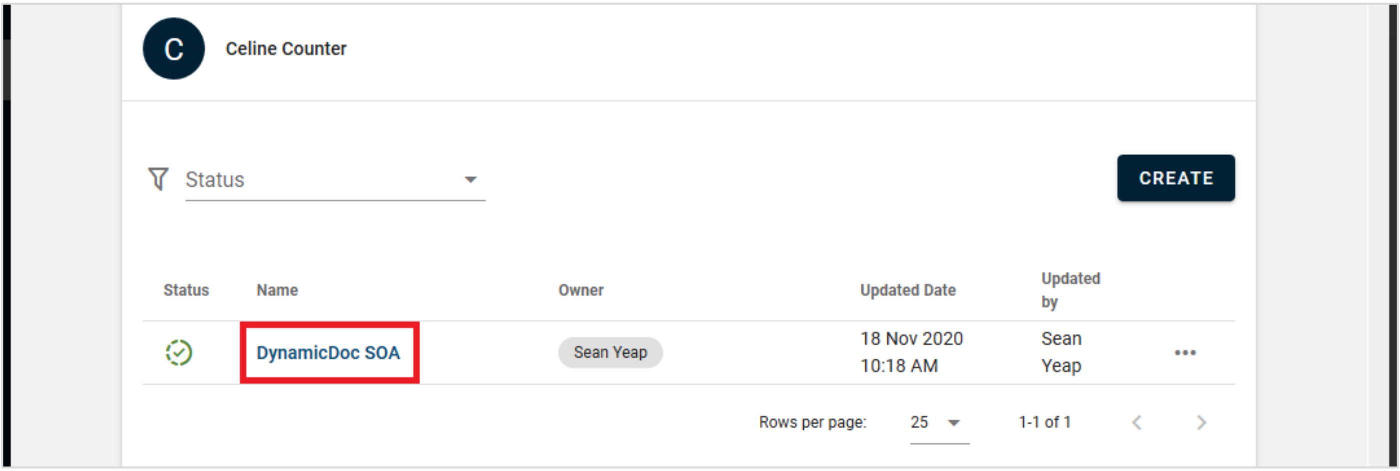
If your source document is not from the client's file note, leave the **Choose from Filenote** checkbox unchecked and click on **Upload file**. This will allow you to upload a file from your computer that will form the basis of the Dynamic Document you are creating.

Create the Dynamic Document

Once you have added a **Name**, **Description** and specified the **Theme** and **Source**, click on **SAVE** which is located at the bottom of the pop-up. The Dynamic Document will be created and appear in the table in the History page of the DynamicDocs app.

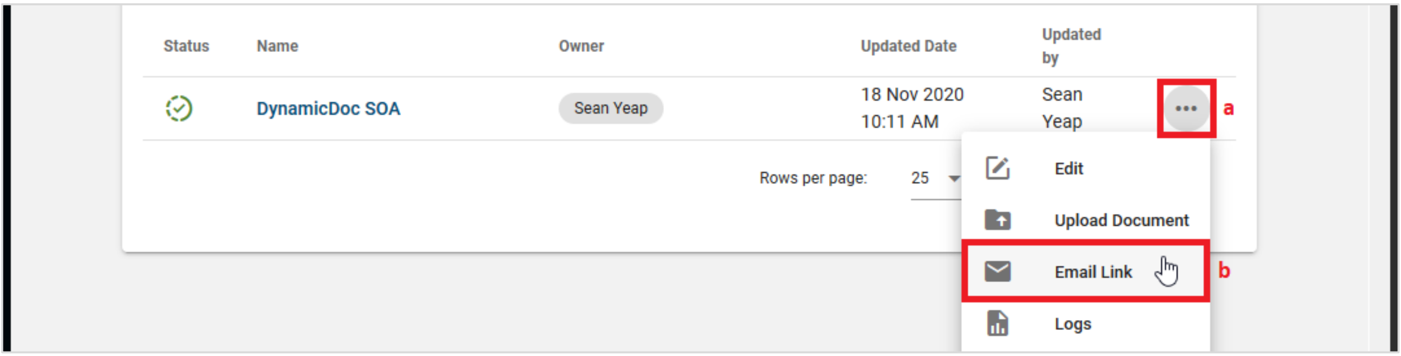
2 Sending the Dynamic SOA

Prior to sending out a link to the client, it is a good idea to review the Dynamic SOA to ensure that information is displayed correctly. You can do that by clicking on the **Name** of the Dynamic Document. This will open the Dynamic SOA in the adviser view.

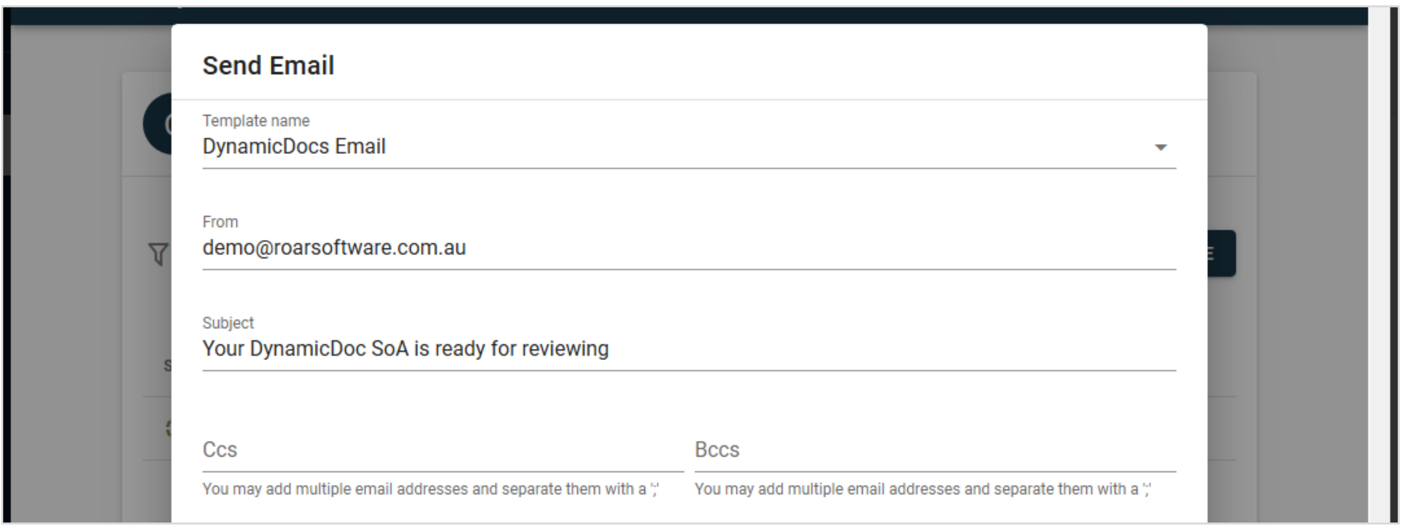


Email Link to Client

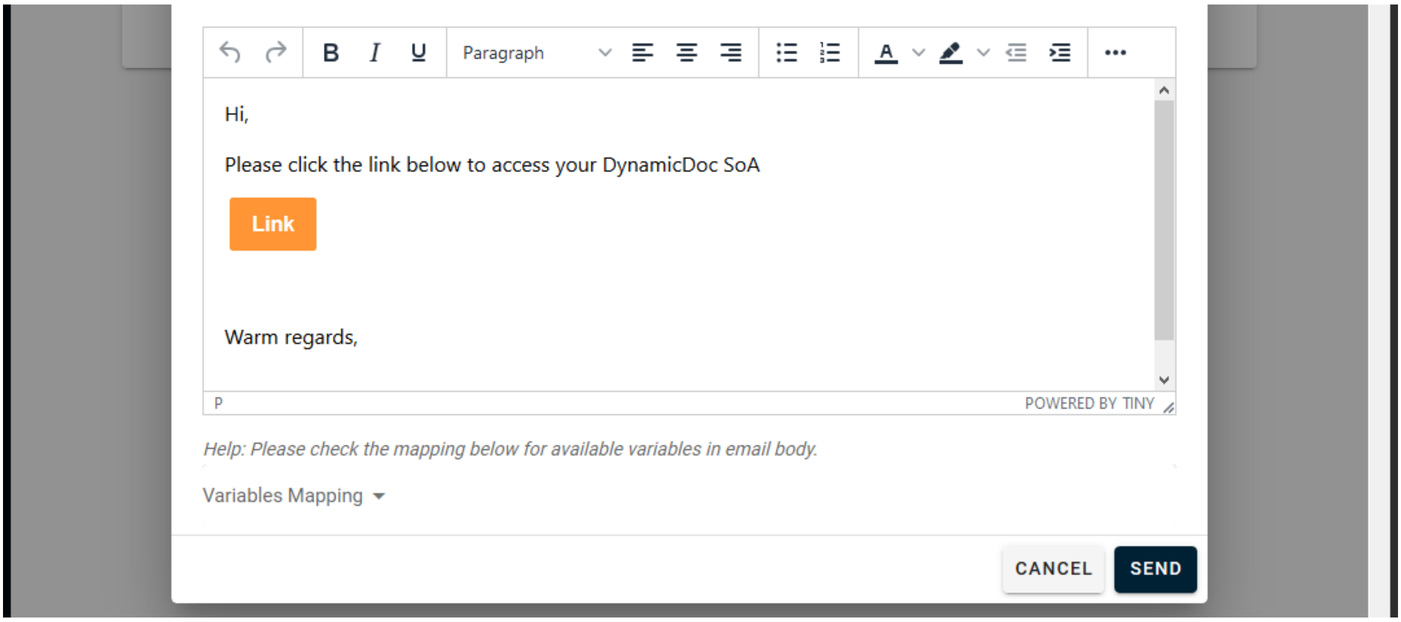
You can email a link to the Dynamic SOA to the client by clicking on the **3 horizontal dots** (**a**) and then clicking on the **Email Link** option (**b**).



The 'Send Email' pop-up will be displayed. This is where you will be able to select the email template you would like to use, add cc or bcc emails and edit the subject and body text for the email. For more information about email templates, please refer to the **Options** section of this guide.



Note: They system will not track the contents of the email being sent. Therefore, it is a good idea to either cc or bcc yourself or an email account that you use to keep a record of the content in the correspondence with your client(s).

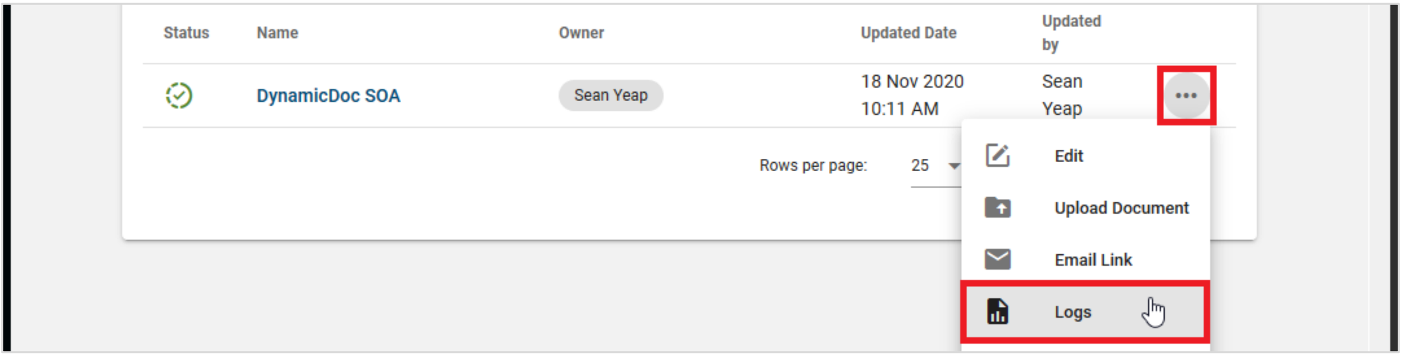


Once everything is set to your liking, you can click on **SEND** button located at the bottom right of the pop-up. The email will then be sent to your client which will provide them a link to view and interact with the Dynamic SOA.

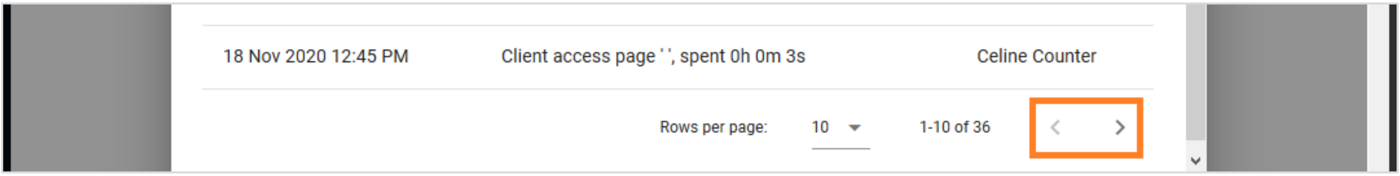
3 Viewing Logs and Reviewing Comments

Viewing Logs

Logs track the movement and actions of client's as they view the Dynamic SOA. You can view logs by clicking on the **3 horizontal dots** and then clicking on the **Logs** option.



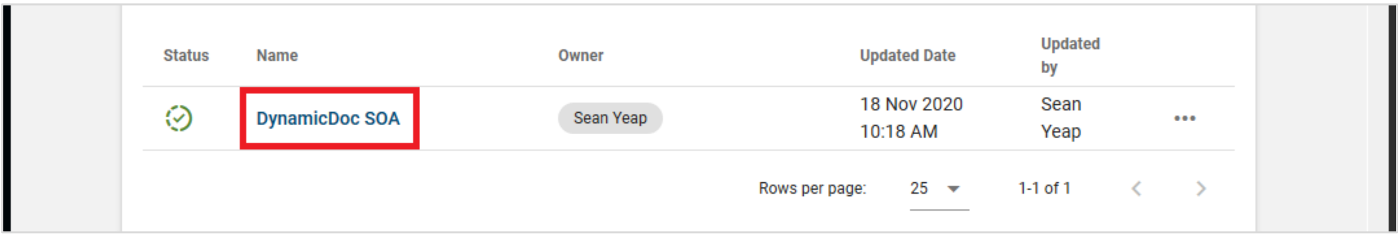
Note: You can move between the pages in logs by clicking on the arrows < > at the bottom of the Logs pop-up.



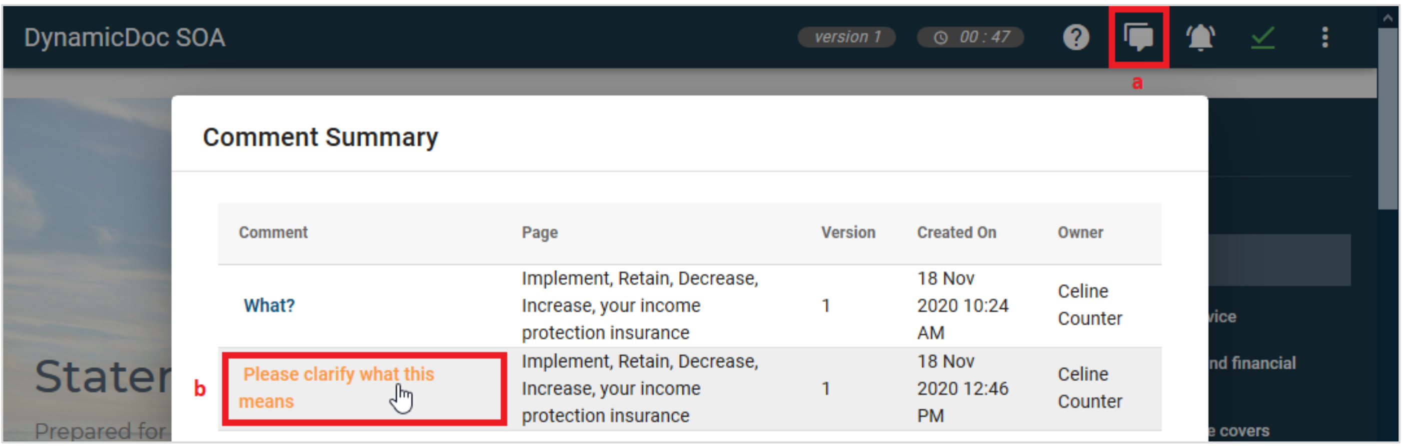
Reviewing Comments

Clients have the ability to leave comments in the Dynamic SOA to highlight areas they may not understand or have questions over. Clients also have a notify adviser function which sends an email to you to request that you review a comment left in the Dynamic SOA.

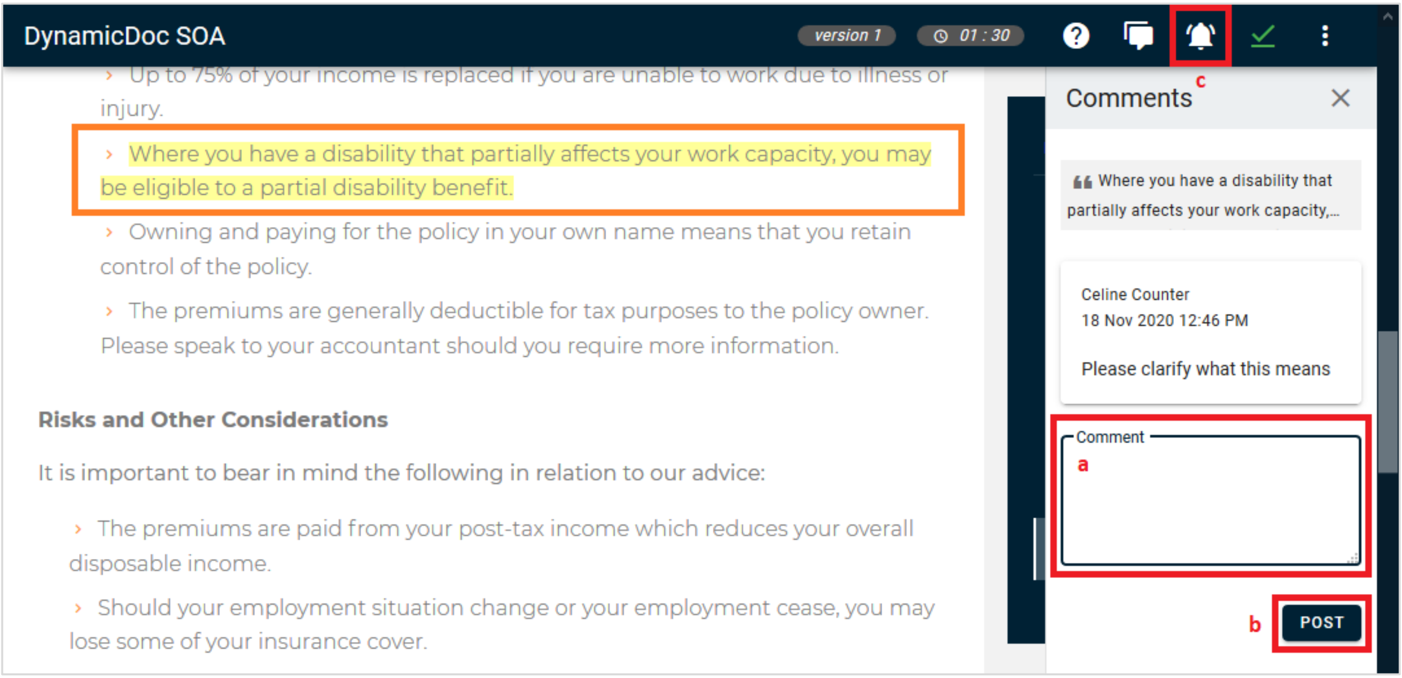
When prompted with an email, you can view the Dynamic SOA by launching the DynamicDocs app and clicking on the **Document Name** which will open the Dynamic SOA.



In the Dynamic SOA, you can click on the **Content Summary** button (**a**) (denoted by the message bubble icon) at the top right of the screen. You can then click on the **Comment** (**b**) to navigate to comment location.



To post a reply, click on the comment box and type your response (**a**). Post the reply by clicking on the **POST** button (**b**). Once all comments have been addressed, you can click on the **Notify Client** button (denoted by the bell icon) located at the top right of screen (**c**) and click on **SUBMIT** to confirm that you would like to notify the client via email that you have responded to their comment.

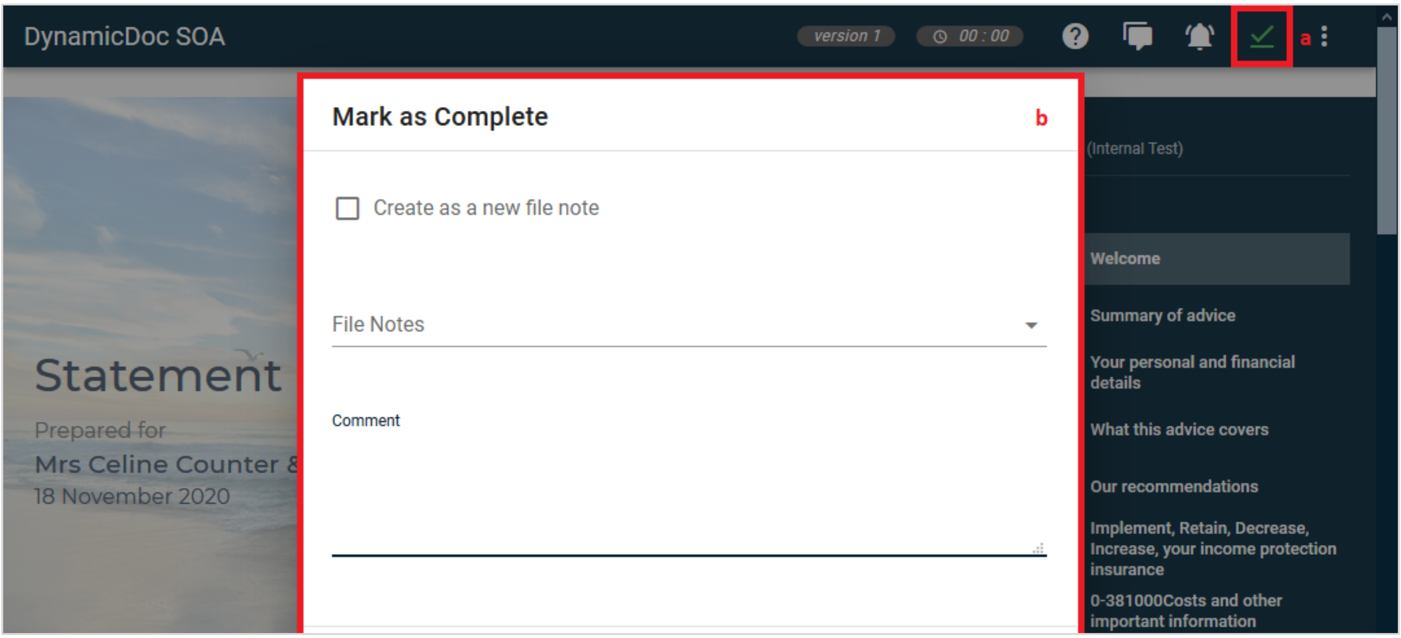


Note: Highlighted text shown in the orange box above, is what the comment is in reference to.

Marking as Complete

You will only be able to mark the Dynamic SOA as 'Complete' when the client has competed the mandatory sections and confirmed that they are done reading the document. If this hasn't been done, you will need to ask the client to action before the document can be marked as complete. When a client has confirmed that they are done reading, you should receive an email letting you know that the client has completed reading the document.

To mark the document as 'Complete', click on the **green checkmark (a)** icon at the top right of screen. This will open the Mark as Complete pop-up. Work your way down the pop-up **(b)**, start by specifying whether you want to create a new file note. If you want to create a new file note, click on the checkbox so it is ticked and then enter the **File Note Subject** and **Comment**.



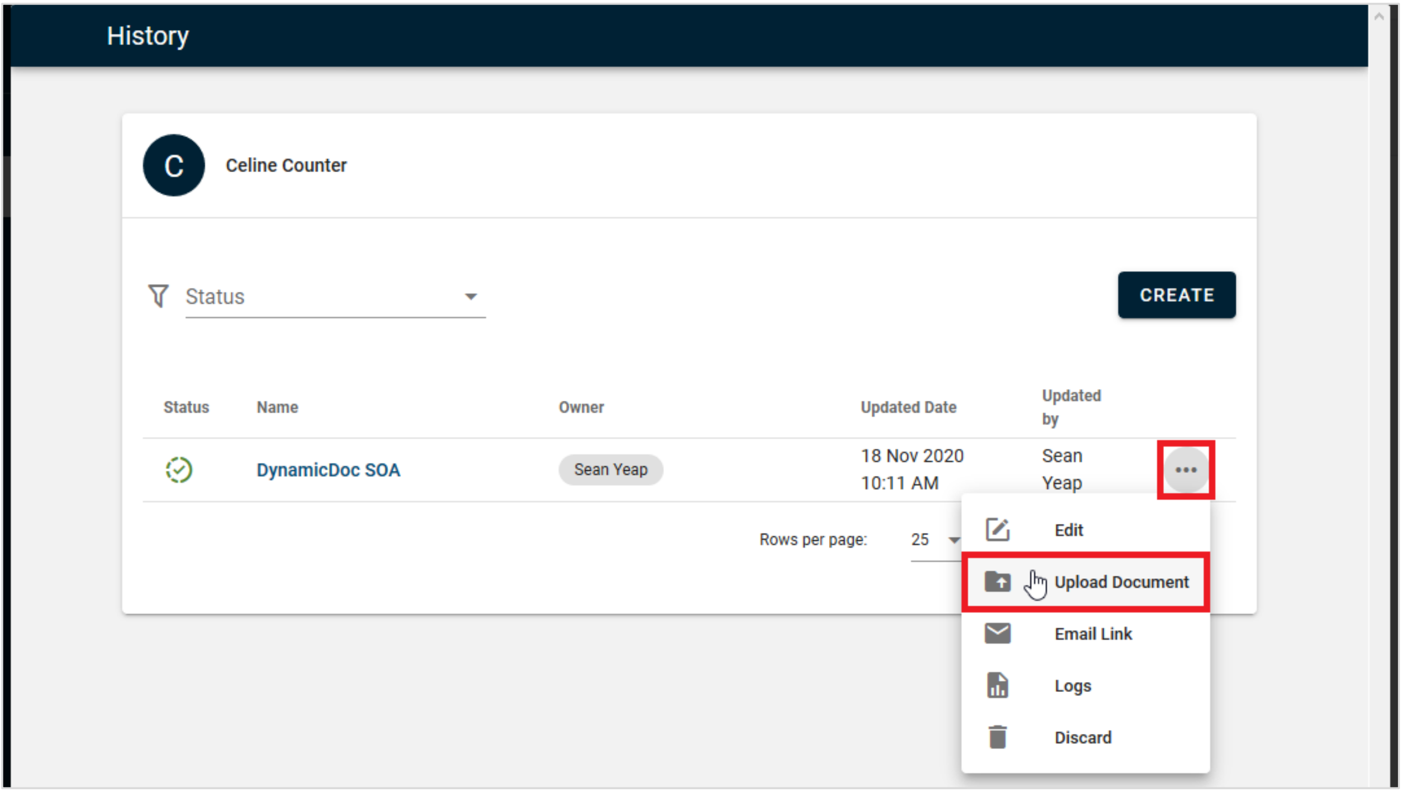
If you wish to use an existing file note, leave the checkbox unchecked and select the file note you want to use via the **File Note** drop-down and add a comment.

When you are done, click on **SAVE**. The information will be passed back either into an existing file note or into a newly created subject in the client's file note. The comment in the file note will contain 3 attachments, the Dynamic Document, the Logs.csv and the Comments.csv which you can download by clicking on them.

DynamicDocs Functions

Upload Document

If you make any changes to the SOA, you can upload an updated version in Dynamic Docs by clicking on the **3 horizontal dots** and then clicking on **Upload Document**.



Downloading a Word Version of the DynamicDoc

You can download the word version of the DynamicDoc by clicking on the **3 vertical dots** and then on **Download Word** when viewing a DynamicDoc.

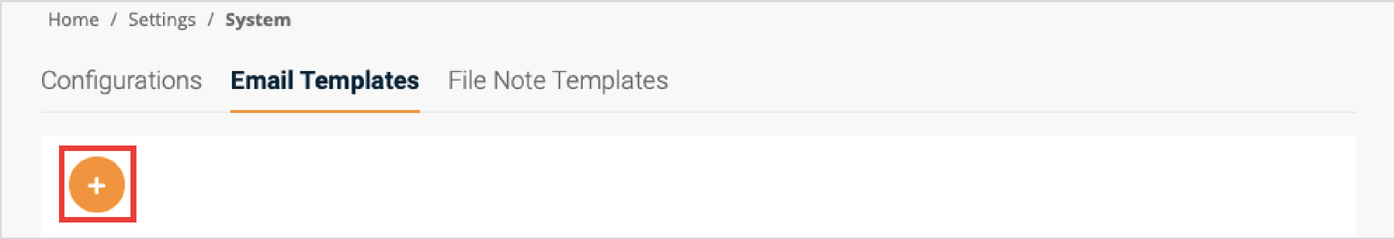
Changing Themes

You can change a Theme used for a DynamicDoc by clicking on the **3 vertical dots** and then on **Change Theme** when viewing a DynamicDoc.

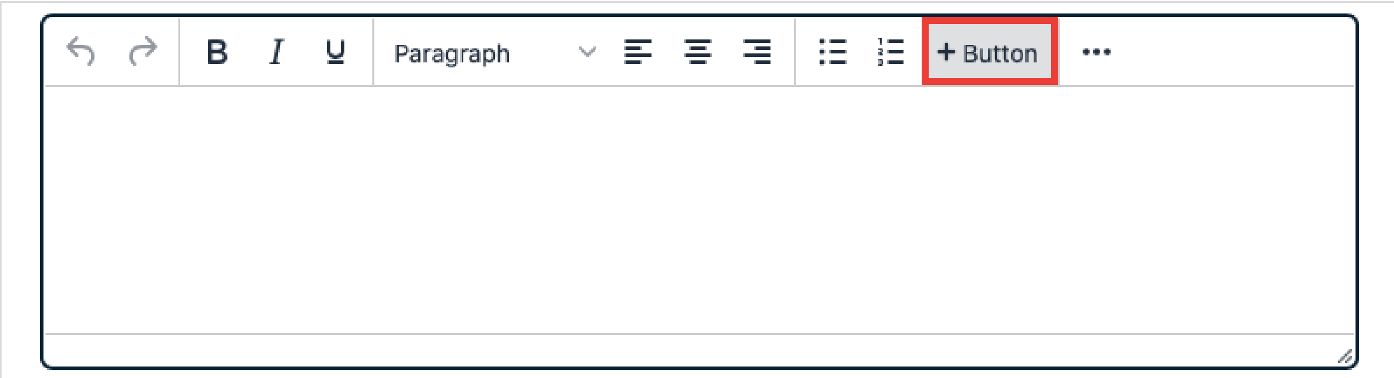
Creating Email Templates

Email templates can be created in **Settings > System** where you will find the **Email Templates** tab. There you will be able to view, created and edit email templates.

To create an email template, click on the **+** button which will open a pop-up where you will be able to create an email template. Work your way down the displayed fields.



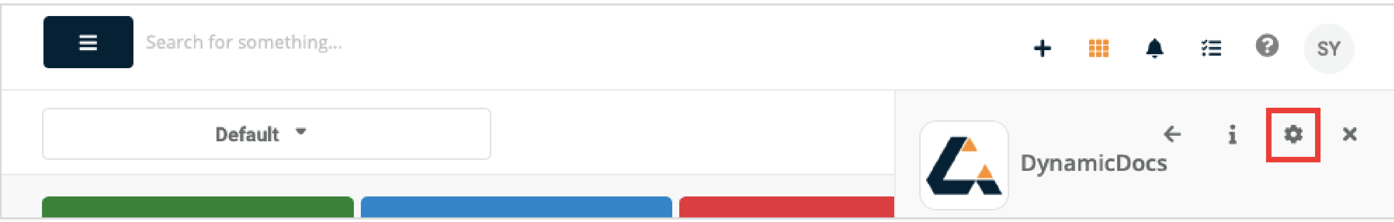
IMPORTANT: As this template will be used to send out a link, please ensure that you click on **+ Button** in the toolbar for the email body text so that there will be a button that the recipient can use to access the DynamicDoc.



Once you have the template set up, click on **Save**. Once a template has been saved, you will be able to use that template when sending out links to DynamicDocs.

Changing the Default Email Template

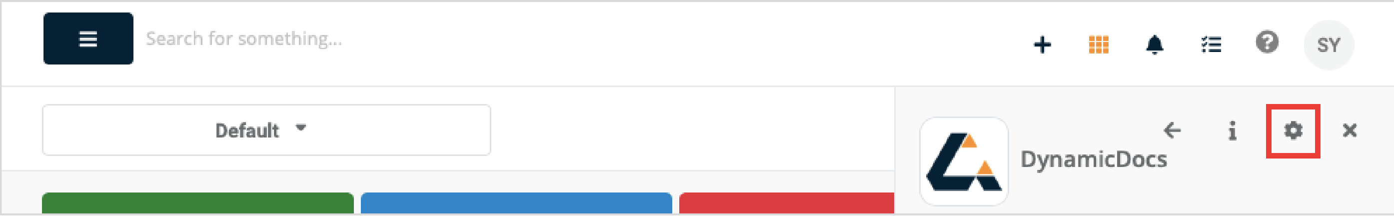
If you have created an email template, you can set that email template as the default option in the DynamicDocs App Settings. You can access the App Settings by clicking on **Apps**, then **DynamicDocs** and then the **Settings Cog** which will take you to the App Settings.



Once in App Settings, you will be able to select the created email template via the **Template Name** dropdown. To have the change applied, please ensure that you click on the **SAVE** button located at the bottom right.

Themes

You can customise the mandatory fields text by uploading a csv file into the theme in the DynamicDocs App Setting. The csv file needs to be named: **mandatory_customise.csv**

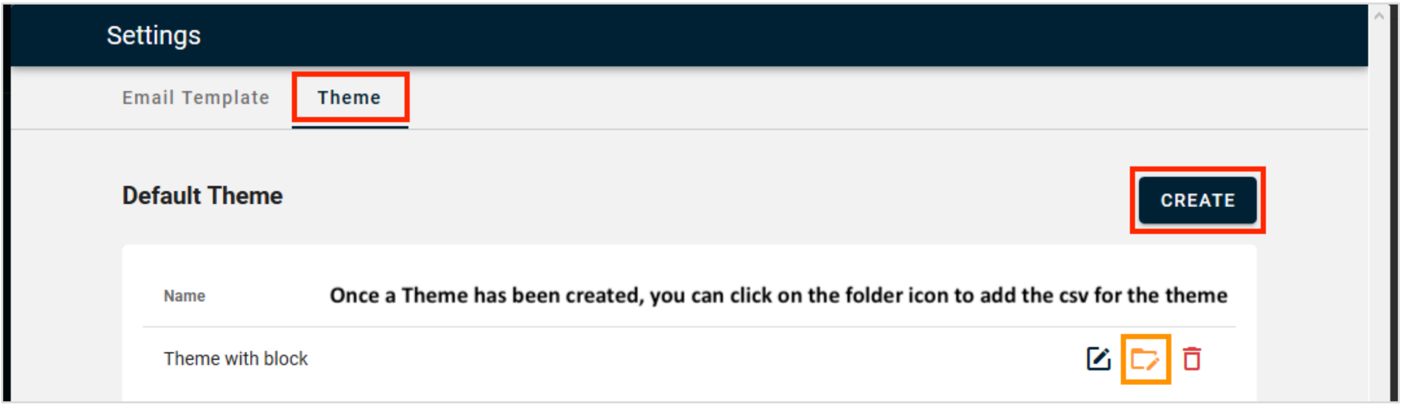


Below are the columns headers that need to be included in the csv file used for a theme:

Column	Description
Class	- This is the class of the mandatory field to be customised
Label	- This is the text to be displayed on the mandatory button
Title	- This is only applicable to popup, the text to be displayed as title of the popup dialogue
Content	- This is only applicable to popup, the text to be displayed in the popup dialogue
Block	- (True | False) this indicates whether the mandatory field will block user from accessing following pages until actioned.

Class	Label	Title	Content	Block
dd-popup-info			Click Yes to confirm that information on this page is correct. Click No if not correct, and highlight sections on this page to add a comment.	TRUE
dd-popup-goal			Click Yes to confirm that your goals on this page are correct. Click No if not correct, and highlight sections on this page to add a comment.	FALSE
dd-popup-recom			Click Yes if you understand the recommendations in all of the "Our Advice to You" pages. Click No if you need clarification, and highlight sections of the recommendations to add a comment.	FALSE
dd-popup-prod-replace			Click Yes if you understand the implications of replacing your current products with new products. Click No if you need clarification, and highlight sections on this page to add a comment.	FALSE
dd-popup-fee			Click Yes if you understand the advice and product fees payable for this advice. Click No if you need clarification and highlight sections on this page to add a comment.	TRUE
dd-checkbox-atp	I agree to the points outlined in the Authority to Proceed.			FALSE

In App Settings, click on the **Theme** tab. There you will be able to create a new Theme by clicking on **CREATE**. Once a Theme is created, you add the csv file by clicking **Manage Assets** button (folder icon).

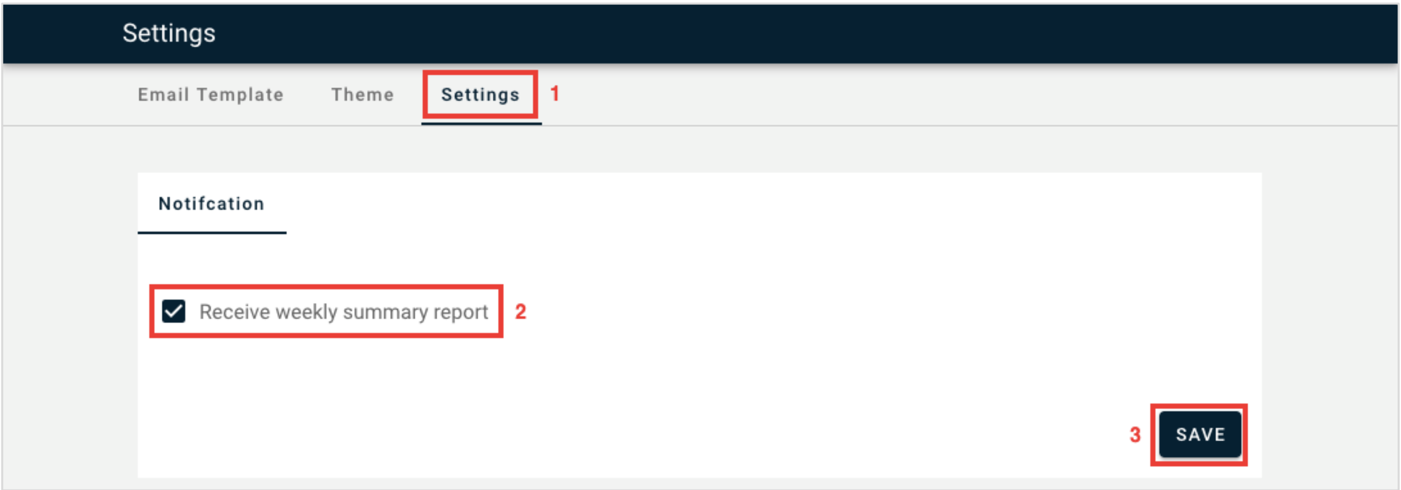


Once the csv is uploaded against the theme, you just need to use the theme against desired document to see the text.

Notifications

From the DynamicDocs App Settings, you can enable the option to receive a weekly report email notification which will send you a summary of your DynamicDocs. The email is scheduled to go out every Monday.

The weekly notification is off by default, so you will need to enable the functionality by opening the App Settings and then clicking on the **Settings Tab (1)**. In the Settings tab, click on the **Receive weekly summary report checkbox (2)** and then click on **Save (3)**.



The email will be in the following format:

Hi {{user first name}}

Please find below your daily DynamicDocs summary

Document	Contact	Read time(Last 7 days)	Comments(Last 7 days)
Document Name 1	Corey Contact	00:05:00	2
Document Name 2	Evan Example	00:02:30	1

Regards,

DASH Software Team