

Svensoni Mi-Zone – How to submit a case



SVENSONI

Please enter your Username (Advisor ID) and password below	
Username	<input type="text"/>
Password	<input type="password"/>

This is your login screen. Insert your LTE number provided via e-mail into the username field, and the password into the password field.



SVENSONI

LTE002923 - Test Test

New Client

Find Client

Useful links

Title	Date added	Times viewed
Guide to case submission on MiZone	18 Nov 2016 12:27	18

[No diary events](#)
[No outstanding ToDo items](#)
[1 - Unread Message](#)
[No unseen Notes](#)
[2 - Unviewed Documents](#)

mi-Work Sheet Leads (2)

Name	Date Entered	Business	Provider	Policy	State	Advisor
Test YetAgain	26 Sep 2017 10:26	Pensions	Please Select	Please Select	Case to Billing	Testpp Testpp
gwtester tester	25 Sep 2017 19:16	Pensions	Please Select	Please Select	Created	Svensoni HeadOffice

mi-State

Display	State	No	Group
Simple	Open	2	
Simple	Closed	0	
Grand Total		2	

This then will take you to your dashboard. As you can see, this displays all your active cases , along with basic information about the case, and highlights in red any messages, “to-do” items or documents created for you to check and respond to on those active cases.

To submit a new case, client the Blue Tab entitled “New Client”.



SVENSONI

Introducing to Your Paraplanner : test2 test2 Network Intrinsic

Personal

Please enter your customers details below		<input type="checkbox"/> Joint Application
	Applicant 1	
Forename		
Surname		
Notes		

Cancel

Continue

This will take you to the above tab – simply key in the first and surname of the client (s) along with anything specific that you feel we need to know in Notes (E.g. Preferred nick names, or postcode if you have more than one client by the same name), then click continue.



SVENSONI

Introducing to Your Paraplanner : test2 test2 Network Intrinsic

Personal

Menu

Finish

Menu (Please select from the menu below the services you would like for this client)

Type of Business

Please Select

Upload Documents

Type/Name

Please Select

File location (max size 4mb)

Browse...

No file selected.

Upload Document

Uploaded Documents List

Date Added

Title

Linked to

Added by

Date viewed

Go Back

Continue

In the next Screen, select the drop down box to tell us what kind of case you need us to work on for you.



SVENSONI

Introducing to Your Paraplanner : test2 test2 Network Intrinsic

Personal

Menu

Finish

Menu (Please select from the menu below the services you would like for this client)

Type of Business

Please Select

- Please Select
- Investments
- Mortgage
- Protection
- Pensions

Upload Documents

Type/Name

Please Select

File location (max size 4mb)

Browse...

No file selected.

Upload Document

Uploaded Documents List

Date Added

Title

Linked to

Added by

Date viewed

Go Back

Continue



SVENSONI

Introducing to Your Paraplanner : test2 test2 Network Intrinsic

Personal

Menu

Finish

Menu (Please select from the menu below the services you would like for this client)

Type of Business

Pensions

DC New Money

REQUIRED DOCUMENTS:

DC Pension Transfer

Final Salary Transfer

Pension Sharing

Drawdown - Cash Only

Drawdown - Income

Drawdown - Transfer

Annuity

Upload Documents

Type/Name

Please Select



File location (max size 4mb)

Browse...

No file selected.

Upload Document

Uploaded Documents List

Date Added

Title

Linked to

Added by

Date viewed

Go Back

Continue

Tick the box that applies to the piece of business you would like us to complete for you, and this will bring up the required documents for that type of business, relevant to your own or your networks requirements.



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Introducing to Your Paraplanner : test2 test2 Network Intrinsic

Personal Menu Finish

Menu (Please select from the menu below the services you would like for this client)

Type of Business	Pensions	REQUIRED DOCUMENTS:
DC New Money	<input type="checkbox"/>	FactFind
DC Pension Transfer	<input checked="" type="checkbox"/>	ATR
Final Salary Transfer	<input type="checkbox"/>	URU
Pension Sharing	<input type="checkbox"/>	Ceding Scheme Info
Drawdown - Cash Only	<input type="checkbox"/>	Soft Facts
Drawdown - Income	<input type="checkbox"/>	
Drawdown - Transfer	<input type="checkbox"/>	
Annuity	<input type="checkbox"/>	

Upload Documents

Type/Name	Please Select
File location (max size 4mb)	Browse... No file selected.

Upload Document

Uploaded Documents List

Date Added	Title	Linked to	Added by	Date viewed
------------	-------	-----------	----------	-------------

Go Back Continue

Then select the files on your PC that relate to the items highlighted in red, and choose from the dropdown box to confirm which of those documents it is (if you are uploading additional documents to those listed please list these under "soft facts" and ensure the documents are named such that we can work out what is in them!)

It will go from this:

Upload Documents

Type/Name **FactFind**

File location (max size 4mb) **Bond to OEIC - Dirty.docx**

Uploaded Documents List

Date Added	Title	Linked to	Added by	Date viewed
------------	-------	-----------	----------	-------------

To This:

Upload Documents

Type/Name **Please Select**

File location (max size 4mb) **No file selected.**

Uploaded Documents List

Date Added	Title	Linked to	Added by	Date viewed
 02 Oct 2017 13:28	FactFind	A message	You	N/A

The text will go green against the item you have uploaded. When all the items are green (Like this)



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Personal

Menu

Finish

Menu (Please select from the menu below the services you would like for this client)

Type of Business

Pensions

DC New Money

REQUIRED DOCUMENTS:

DC Pension Transfer

FactFind

Final Salary Transfer

ATR

Pension Sharing

URU

Drawdown - Cash Only

Ceding Scheme Info

Drawdown - Income

Soft Facts

Drawdown - Transfer

Annuity

Upload Documents

Type/Name

Please Select

File location (max size 4mb)

Browse...

No file selected.

Upload Document

Uploaded Documents List

Date Added	Title	Linked to	Added by	Date viewed
02 Oct 2017 13:31	Soft Facts	A message	You	N/A
02 Oct 2017 13:31	Ceding Scheme Info	A message	You	N/A
02 Oct 2017 13:31	URU	A message	You	N/A
02 Oct 2017 13:31	ATR	A message	You	N/A

Click the continue button and you will receive a confirmation message like so



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Introducing to Your Paraplanner : test2 test2 Network Intrinsic

[Personal](#) [Menu](#) [Finish](#)

Thank you for submitting this case. If you are sure all your details are correct and that documents required have been uploaded to our team, please click close at he bottom of this window.

[Go Back](#) [Close](#)

If you then close this tab you should then see the new entry in the dashboard like so:



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LTE002923 : Test Test

New Client

Find Client

Useful links

Title	Date added	Times viewed
Guide to case submission on MiZone	18 Nov 2016 12:27	18

No diary events No outstanding ToDo items **1 - Unread Message** No unseen Notes **2 - Unviewed Documents**

mi-Work Sheet Leads (3)

Name	Date Entered	Business	Provider	Policy	State	Advisor
test test	02 Oct 2017 13:02	Pensions			Created	test2 test2
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gwttester tester	25 Sep 2017 19:16	Pensions	Please Select	Please Select	Created	Svensoni HeadOffice

mi-State

Display	State	No	Group
Simple	Open	3	
Simple	Closed	0	
Grand Total		3	

If you have any questions please call us on 01793 940660 and we will be happy to help.