



# Tracking Fact Find Responses

With Dynamic Planner

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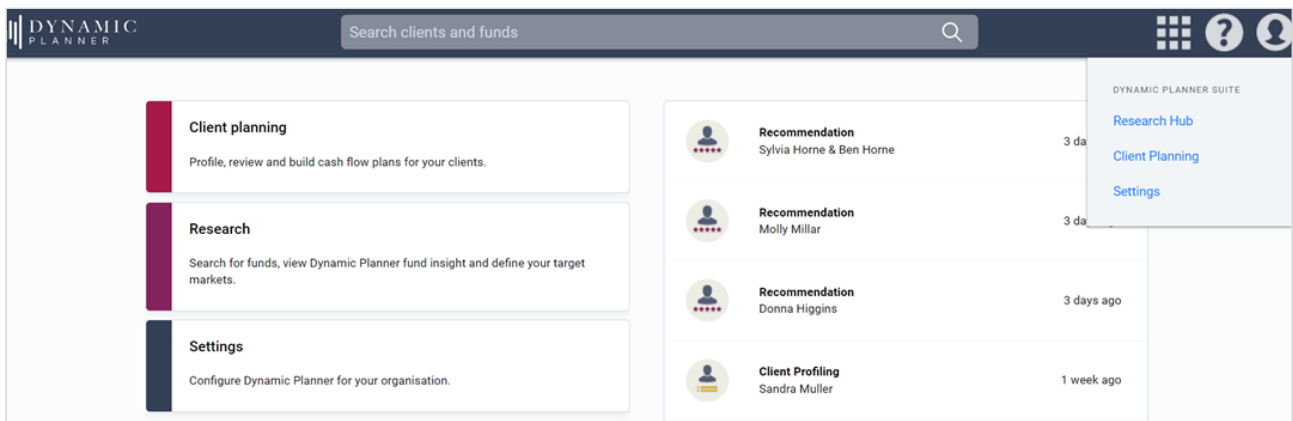
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# 1 Tracking Fact Find responses

This guide will take you through the process of tracking your clients' responses and is particularly useful if you regularly send a high number of Fact Find invitations.

## 1.1 Accessing the Fact Find responses tracker

To track your clients' responses, in the Dynamic Planner home page, click on **Client Planning** on the left-hand side of the screen or click on the Rubix cube icon in the top right corner and select Client Planning in the drop-down menu.

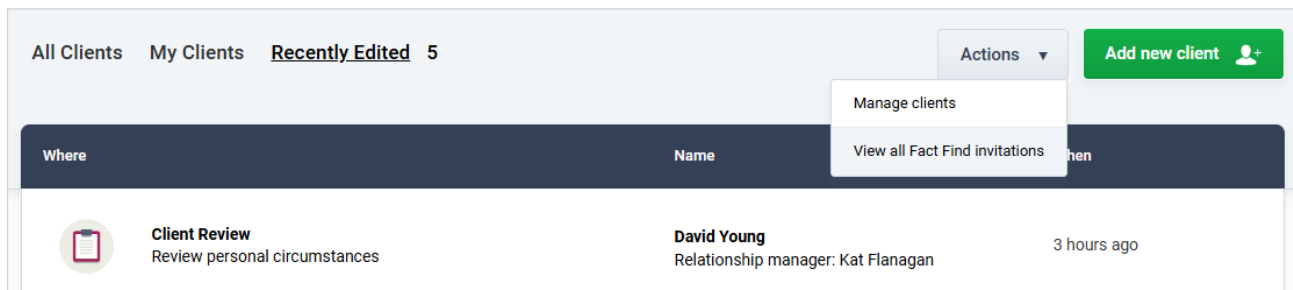


The screenshot shows the Dynamic Planner home page. At the top, there is a search bar labeled "Search clients and funds" and a navigation menu with icons for a Rubix cube, help, and user profile. On the left, there are three main sections: "Client planning" (Profile, review and build cash flow plans for your clients.), "Research" (Search for funds, view Dynamic Planner fund insight and define your target markets.), and "Settings" (Configure Dynamic Planner for your organisation.). On the right, there is a list of client activities:


Activity	Client Name	Time
Recommendation	Sylvia Horne & Ben Horne	3 da
Recommendation	Molly Millar	3 da
Recommendation	Donna Higgins	3 days ago
Client Profiling	Sandra Muller	1 week ago

A "DYNAMIC PLANNER SUITE" dropdown menu is open, showing options for "Research Hub", "Client Planning", and "Settings".

In top right-hand corner, click the grey **Actions** drop down menu and select **View all Fact Find invitations**.



The screenshot shows the "Recently Edited" client list. At the top, there are tabs for "All Clients", "My Clients", and "Recently Edited" (with a count of 5). There is an "Actions" dropdown menu and an "Add new client" button. The "Actions" menu is open, showing options for "Manage clients" and "View all Fact Find invitations". Below the menu, a table displays client information:

Where	Name	When
 <b>Client Review</b> Review personal circumstances	<b>David Young</b> Relationship manager: Kat Flanagan	3 hours ago

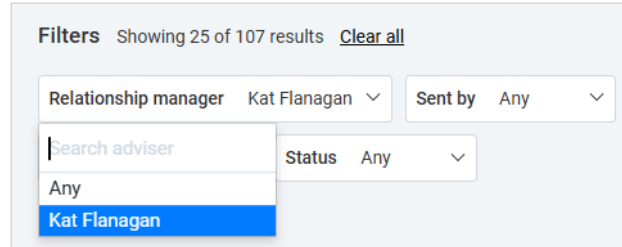
You will then be presented with a list of all the Fact Find invitations that you have sent so far. You can narrow down your search by using the filters at the top of the screen and you can **create reports** by clicking the grey **Download CSV** button in the top right-hand corner.

All Fact Find invitations							
Filters Showing 25 of 107 results <a href="#">Clear all</a>							
Relationship manager	Any	Sent by	Any	Tasks	Any	Sent	Any
Returned	Any	Status	Any				
							<a href="#">Download CSV</a>
Client name	Relationship manager	Sent by	Tasks	Sent	Expiry	Returned	Status
Fiona Harris	Kat Flanagan	Kat Flanagan	AR IN EX GO	14/02/2025	06/03/2025		Pending
David Young	Kat Flanagan	Kat Flanagan	PC OB	14/02/2025	19/02/2025		Pending
Phillip Jeffries	Kat Flanagan	Kat Flanagan	RI	24/01/2025	29/01/2025	24/01/2025	Completed
Helen Edwards	Kat Flanagan	Kat Flanagan	AT CA IE SU RI	22/01/2025	27/01/2025	22/01/2025	Completed
Phillip Jeffries	Kat Flanagan	Kat Flanagan	AT CA IE SU RI	21/01/2025	26/01/2025	21/01/2025	Completed
Anita Ekberg	Kat Flanagan	Kat Flanagan	AT CA IE SU	18/11/2024	18/12/2024		Expired

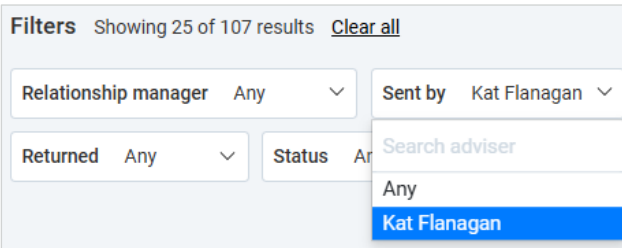


## 1.2 Setting filters

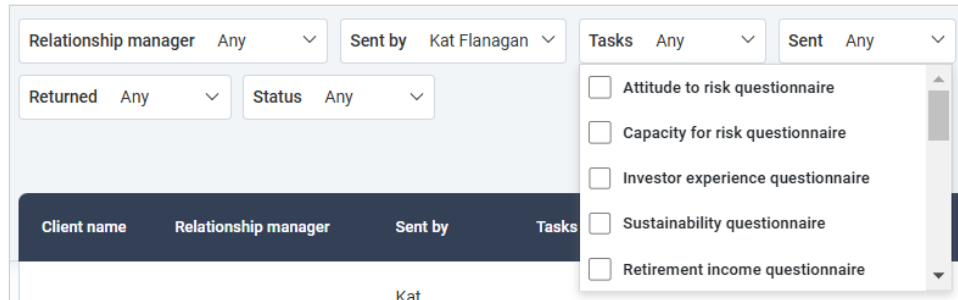
You can search for clients assigned to a specific Relationship Manager.



You can check who in your firm has sent invites to by using the Sent by drop down menu:



Or you can search by Tasks, these are the different types of questionnaires.



Please note that, in the tasks column, these are marked by initials, if you hover over them, you will see what they stand for:

Client name	Relationship manager	Sent by	Tasks
<a href="#">Robert Thompson</a>	Kat Flanagan	Kat Flanagan	<div style="border: 1px solid black; padding: 2px; display: inline-block;">Attitude to risk questionnaire</div> AT CA IE SU

Client name	Relationship manager	Sent by	Tasks
<a href="#">Robert Thompson</a>	Kat Flanagan	Kat Flanagan	<div style="border: 1px solid black; padding: 2px; display: inline-block;">Sustainability questionnaire</div> AT CA IE SU



Alternatively, you could use one of the time-sensitive filters – **Sent**, **Expiry** and **Returned** - and search for Fact Find invites that were sent in the last 14 days, for example.

Relationship manager Any Sent by Any Tasks Any Sent Last 14 days Expiry Any

Returned Any Status Any

Download CSV

Client name	Relationship manager	Sent by	Tasks	Sent	Expiry	Returned	Status
Fiona Harris	Kat Flanagan	Kat Flanagan	AR IN EX GO			13/02/2025	Pending
David Young	Kat Flanagan	Kat Flanagan	PC OB	14/02/2025	19/02/2025		Pending

If you want to run a search for a specific period of time, for example for all returned responses in the last month, you can click **Custom** in the drop down menu and then select the “to” and “from” dates in the calendar.

Returned 01/01/2025 to 31/01/2025

January 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

You can see that for the month of January, three Fact Find Invites were returned.

Relationship manager Any Sent by Any Tasks Any Sent Any Expiry Any

Returned 01/01/2025 to 31/01/2025 Status Any

Download CSV

Client name	Relationship manager	Sent by	Tasks	Sent	Expiry	Returned	Status
Phillip Jeffries	Kat Flanagan	Kat Flanagan	RI	24/01/2025	29/01/2025	24/01/2025	Completed
Helen Edwards	Kat Flanagan	Kat Flanagan	AT CA IE SU RI	22/01/2025	27/01/2025	22/01/2025	Completed
Phillip Jeffries	Kat Flanagan	Kat Flanagan	AT CA IE SU RI	21/01/2025	26/01/2025	21/01/2025	Completed

Alternatively, you can simply click on the up or down arrows next to the Sent, Expiry or Returned column titles. In the example below, by clicking on the down arrow next to Returned, you can see the returned invites in chronological order starting with the most recent completed invite.

Client name	Relationship manager	Sent by	Tasks	Sent	Expiry	Returned	Status
Phillip Jeffries	Kat Flanagan	Kat Flanagan	RI	24/01/2025	29/01/2025	24/01/2025	Completed
Helen Edwards	Kat Flanagan	Kat Flanagan	AT CA IE SU RI	22/01/2025	27/01/2025	22/01/2025	Completed
Phillip Jeffries	Kat Flanagan	Kat Flanagan	AT CA IE SU RI	21/01/2025	26/01/2025	21/01/2025	Completed
Andrew Davis	Kat Flanagan	Kat Flanagan	AT CA IE SU	08/11/2024	08/12/2024	08/11/2024	Completed
Jane Harvey	Kat Flanagan	Kat Flanagan	PD AL	20/09/2024	25/09/2024	20/09/2024	Completed
Michelle Sanders	Kat Flanagan	Kat Flanagan	PD	20/09/2024	20/10/2024	20/09/2024	Completed
Gordon Cole	Kat Flanagan	Kat Flanagan	AT CA IE SU	22/07/2024	27/07/2024	22/07/2024	Completed

Finally, you can also use the Status filter, by selecting one of the options in the drop down menu. In the example below, you can see which invites have expired together with the sent date and expiry date.

Relationship manager Any
Sent by Any
Tasks Any
Sent Any
Expiry Any
Returned Any
Status Expired
Download CSV

Client name	Relationship manager	Sent by	Tasks	Sent	Expiry	Returned	Status
Anita Ekberg	Kat Flanagan	Kat Flanagan	AT CA IE SU	18/11/2024	18/12/2024		Expired
Fiona Harris	Kat Flanagan	Kat Flanagan	AT CA IE SU	24/09/2024	04/10/2024		Expired

### 1.3 Resending a Fact Find invitation

If you wish to resend an invitation, all you need to do is **click on the client's name** in the list

Client name	Relationship manager	Sent by	Tasks	Sent	Expiry	Returned	Status
<a href="#">Fiona Harris</a>	Kat Flanagan	Kat Flanagan	AR IN EX GO	14/02/2025	06/03/2025		Expired
<a href="#">David Young</a>	Kat Flanagan	Kat Flanagan	PC OB	14/02/2025	19/02/2025		Expired

You will be taken directly to that client's Fact Find invitations page where you can click the blue [Resend](#) button to send another invitation.

Tasks	Sent	Returned	Status	Actions
OB PC	34 weeks ago	-	Expired	<a href="#">Resend</a>

## 1.4 Clearing all filters

If at any point, you wish to clear all the filters and re-start your search from scratch, click the underlined **Clear all** option.

**Filters** Showing 25 of 43 results [Clear all](#)

Relationship manager Any ▾ Sent by Any ▾ Tasks Any ▾ Sent Any ▾ Expiry Any ▾

Returned Any ▾ Status Expired ▾

[Download CSV](#)

Client name	Relationship manager	Sent by	Tasks	Sent	Expiry	Returned	Status
Anita Ekberg	Kat Flanagan	Kat Flanagan	AT CA IE SU	18/11/2024	18/12/2024		Expired
Fiona Harris	Kat Flanagan	Kat Flanagan	AT CA IE SU	24/09/2024	04/10/2024		Expired
Lynda New	Kat Flanagan	Kat Flanagan	PC OB	19/06/2024	24/06/2024		Expired
Phillip Jeffries	Kat Flanagan	Kat Flanagan	AR IN EX GO	19/06/2024	29/06/2024		Expired



Dynamic Planner  
C/O Moorcrofts LLP  
Thames House  
Mere Park  
Dedmere Road  
Marlow  
Buckinghamshire  
SL7 1PB

**Email** [support@dynamicplanner.com](mailto:support@dynamicplanner.com)

**Phone** +44 (0)333 6000 500

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