Tracking Fact Find Responses

With Dynamic Planner

May 2025

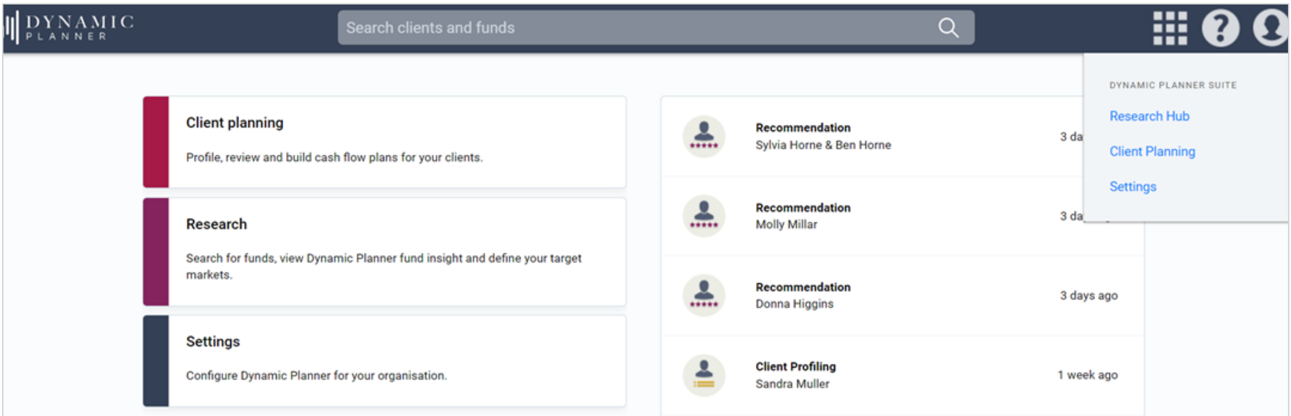
Contents

1 Tracking Fact Find responses

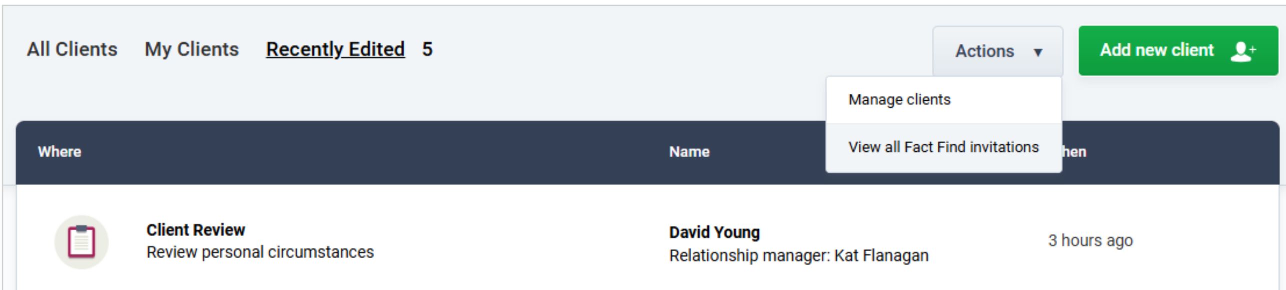
This guide will take you through the process of tracking your clients' responses and is particularly useful if you regularly send a high number of Fact Find invitations.

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.



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



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 Clear all

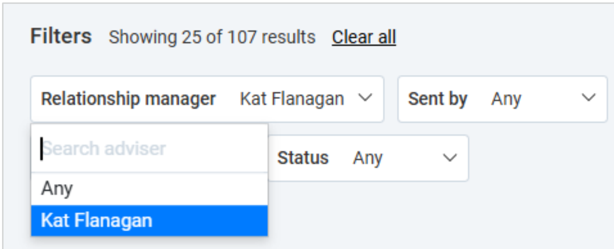
Relationship manager Any | Sent by Any | Tasks Any | Sent Any | Expiry Any | Returned Any | Status Any

Download CSV

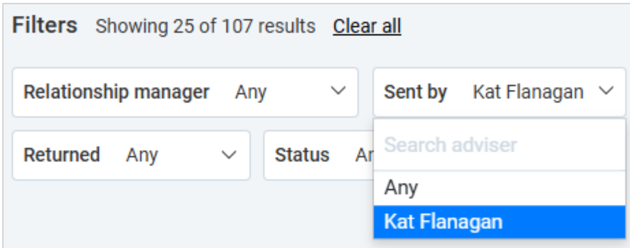
Client name	Relationship manager	Sent by	Tasks	Sent	Expiry	Returned	Status
Fiona Harris	Kat Flanagan	Kat Flanagan	AR IN EX GO	14/02/2025	06/03/2025		Pending
David Young	Kat Flanagan	Kat Flanagan	PC OB	14/02/2025	19/02/2025		Pending
Phillip Jeffries	Kat Flanagan	Kat Flanagan	RI	24/01/2025	29/01/2025	24/01/2025	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

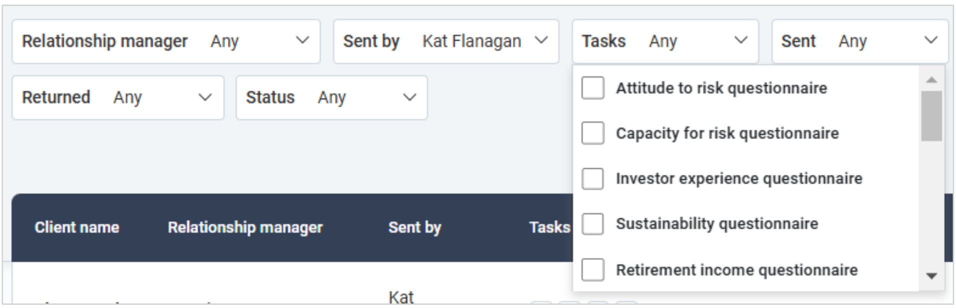
You can search for clients assigned to a specific Relationship Manager.



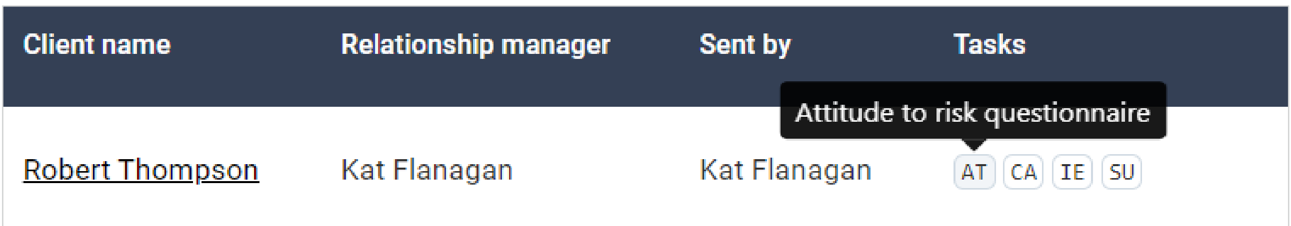
You can check who in your firm has sent invites to by using the Sent by drop down menu:

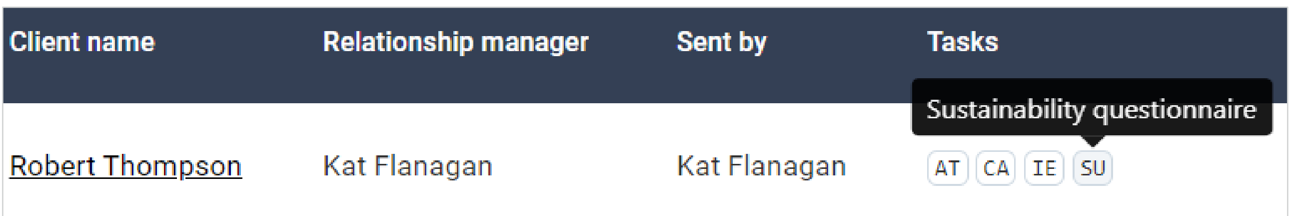


Or you can search by Tasks, these are the different types of questionnaires.

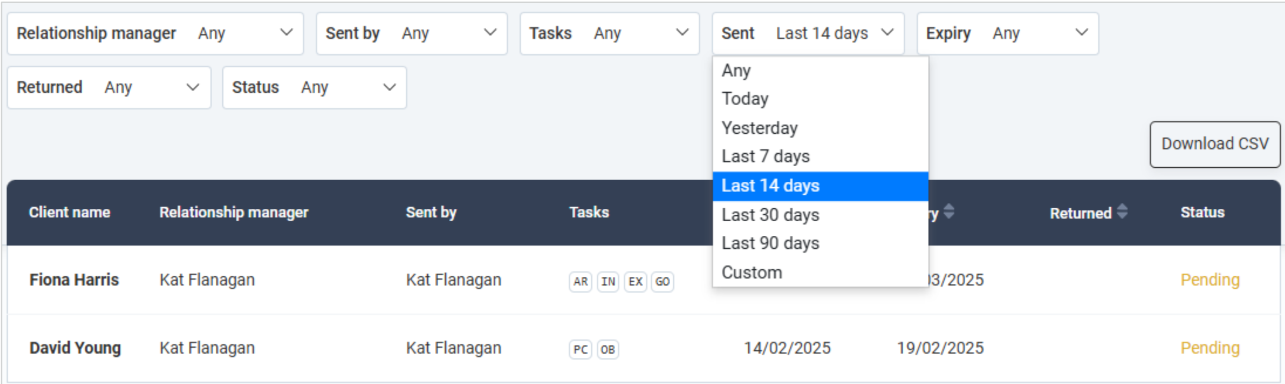


Please note that, in the tasks column, these are marked by initials, if you hover over them, you will see what they stand for:

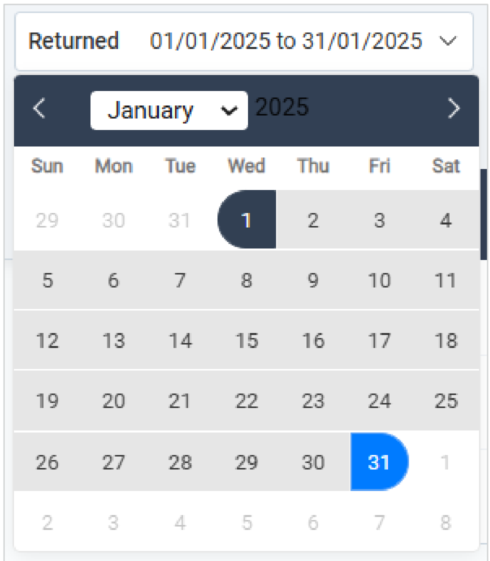




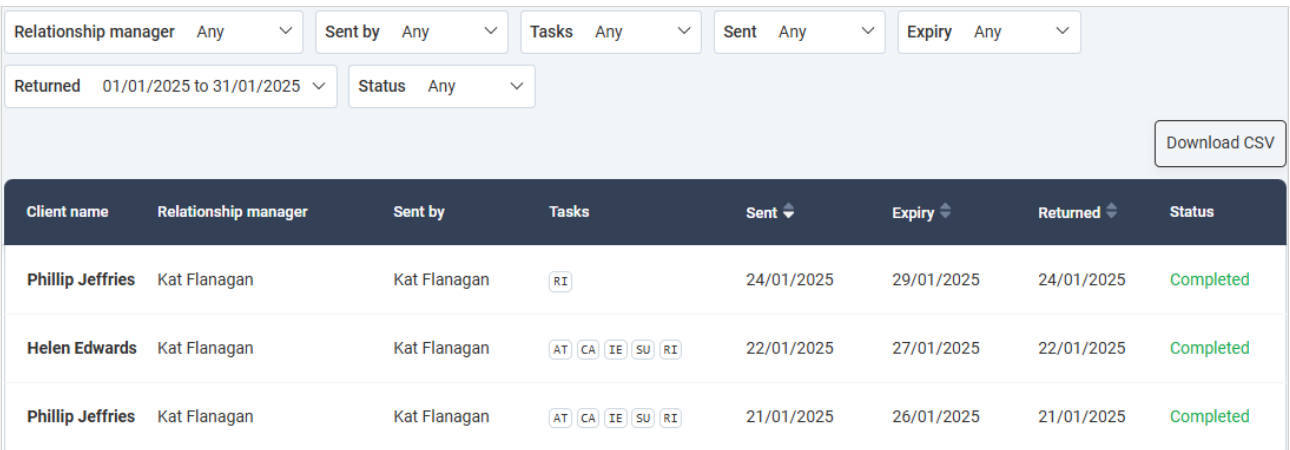
Alternatively, you could use one of the time-sensitive filters – **Sent, Expiry** and **Returned** - and search for Fact Find invites that were sent in the last 14 days, for example.



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.



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

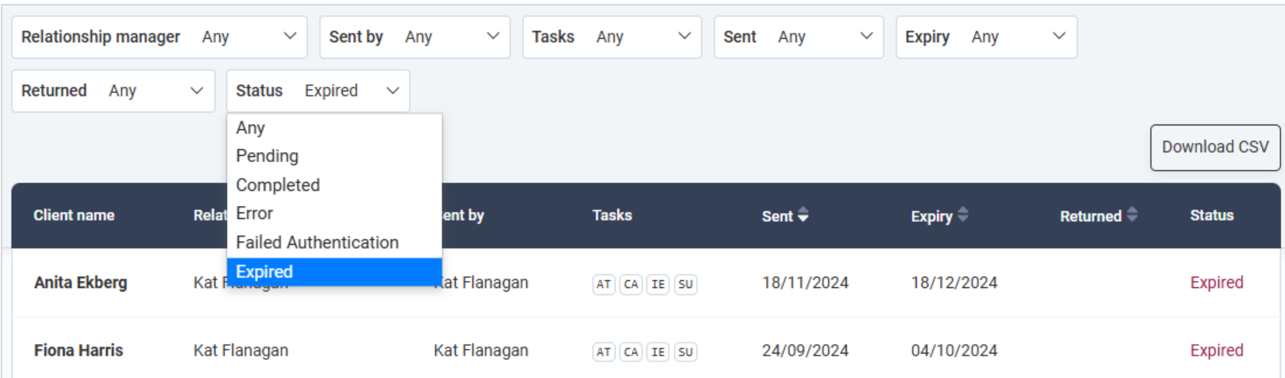


Client name	Relationship manager	Sent by	Tasks	Sent	Expiry	Returned	Status
Phillip Jeffries	Kat Flanagan	Kat Flanagan	RI	24/01/2025	29/01/2025	24/01/2025	Completed
Helen Edwards	Kat Flanagan	Kat Flanagan	AT CA IE SU RI	22/01/2025	27/01/2025	22/01/2025	Completed
Phillip Jeffries	Kat Flanagan	Kat Flanagan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

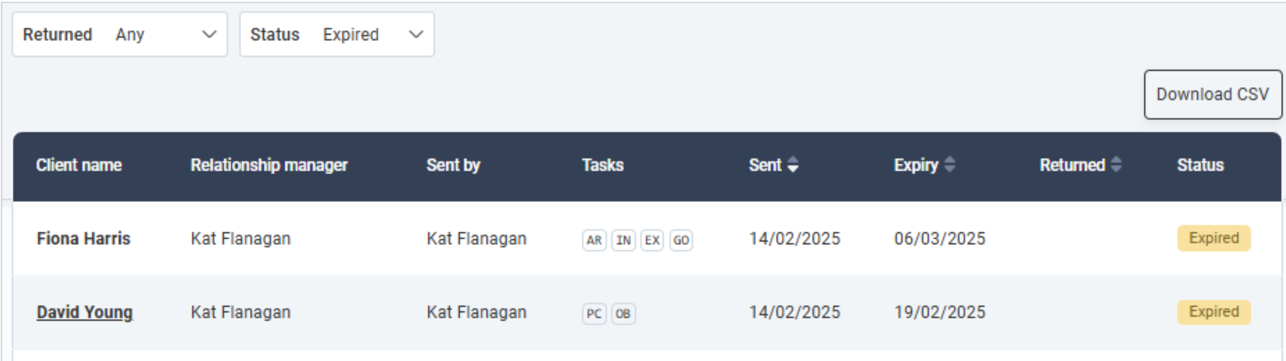
Finally, you can also use the Status filter, by selecting one of the options in the drop down menu. In the example below, you can see which invites have expired together with the sent date and expiry date.



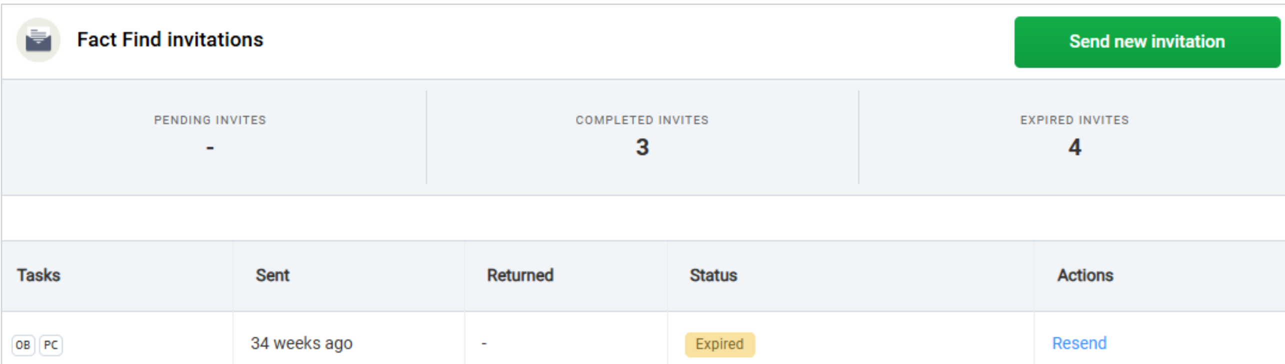
DYNAMIC PLANNER

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

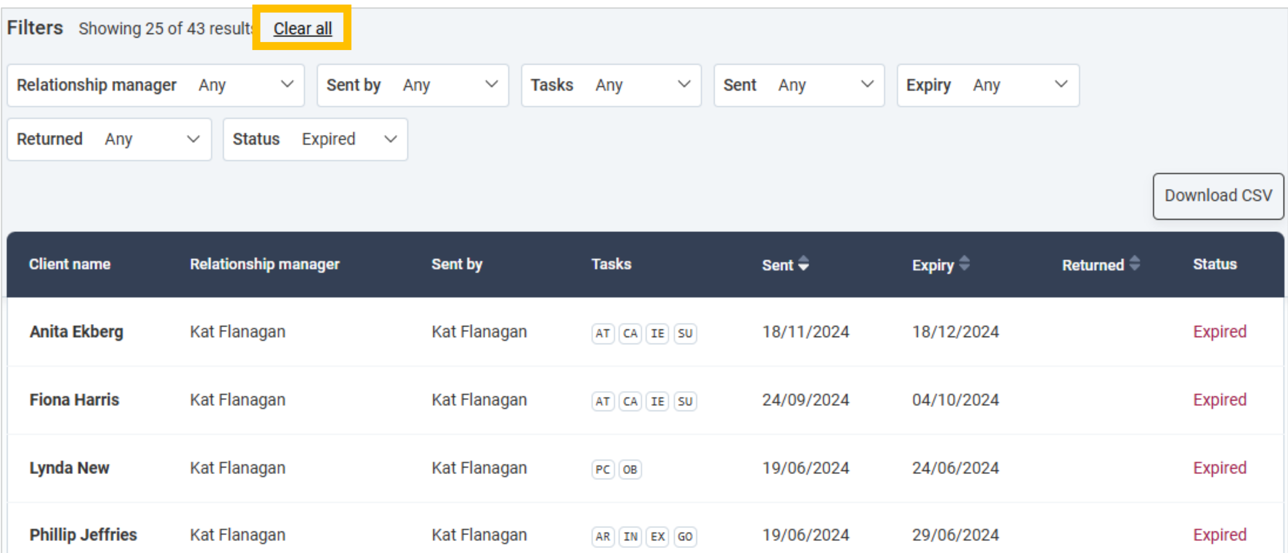


You will be taken directly to that client's Fact Find invitations page where you can click the blue Resend button to send another invitation.



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 **<u>Clear all</u>** option.



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

Email support@dynamicplanner.com

Phone +44 (0)333 6000 500