

Requesting Quotes - Common Buttons

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There are a number of buttons on the various quote screens which work in the same way on the different product types.

If you are producing a quote for each client and also a joint quote, use the **Quote for** buttons at the top of the page to select who you are producing the quote for.

By selecting **Premium** from this page, the **Death Benefit** amount will change to **Premium Amount**.

The screenshot shows the Weblin interface for configuring a Level Term Assurance quote. The interface includes a sidebar with navigation options (Quote, Find, Clients, Products, Level Term Assurance, Results, Apply) and a main content area with two sections: Product details and Product features. The Product details section contains radio buttons for Quote for (Life one, Life two, Both), Include Critical Illness cover? (Yes, No), Driven by (Benefit, Premium), Premium frequency (Monthly, Annually), Death benefit amount (input field), Term or Cease age (Term, Cease age), and Term length (input field). The Product features section contains radio buttons for Include Child CIC/SIC? (Yes, No), Waiver of premium? (None, Life one, Life two, Both), Increasing benefit? (Yes, No), Renewable policy? (Yes, No), Guaranteed rates? (Yes, No), and Reviewable rates? (Yes, No). A 'Quick Commission' button is located at the bottom left, and 'Back' and 'Next' buttons are at the bottom right.

Critical Illness cover is set to “No” by default - click “Yes” if Critical Illness cover is to be included as shown below.

Clicking the **Choose...** button allows you to select up to three CIC options from a selection menu.

Product details

Quote for	<input checked="" type="radio"/> Life one	<input type="radio"/> Life two	<input type="radio"/> Both
Include Critical Illness cover?	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="button" value="Choose..."/> Comprehensive
Critical Illness death benefit is	<input checked="" type="radio"/> Accelerated	<input type="radio"/> Additional	
Driven by	<input checked="" type="radio"/> Benefit	<input type="radio"/> Premium	
Premium frequency	<input checked="" type="radio"/> Monthly	<input type="radio"/> Annually	
Death benefit amount	<input type="text" value="£"/>		
Critical Illness benefit amount	<input type="text" value="£"/>		
Term or Cease age	<input checked="" type="radio"/> Term	<input type="radio"/> Cease age	
Term length	<input type="text" value="years"/>		

Tick the required options. Click the **“Apply”** button to save the options and close this box.

Up to three options can be selected.

Critical Illness Options

Please select at least one option

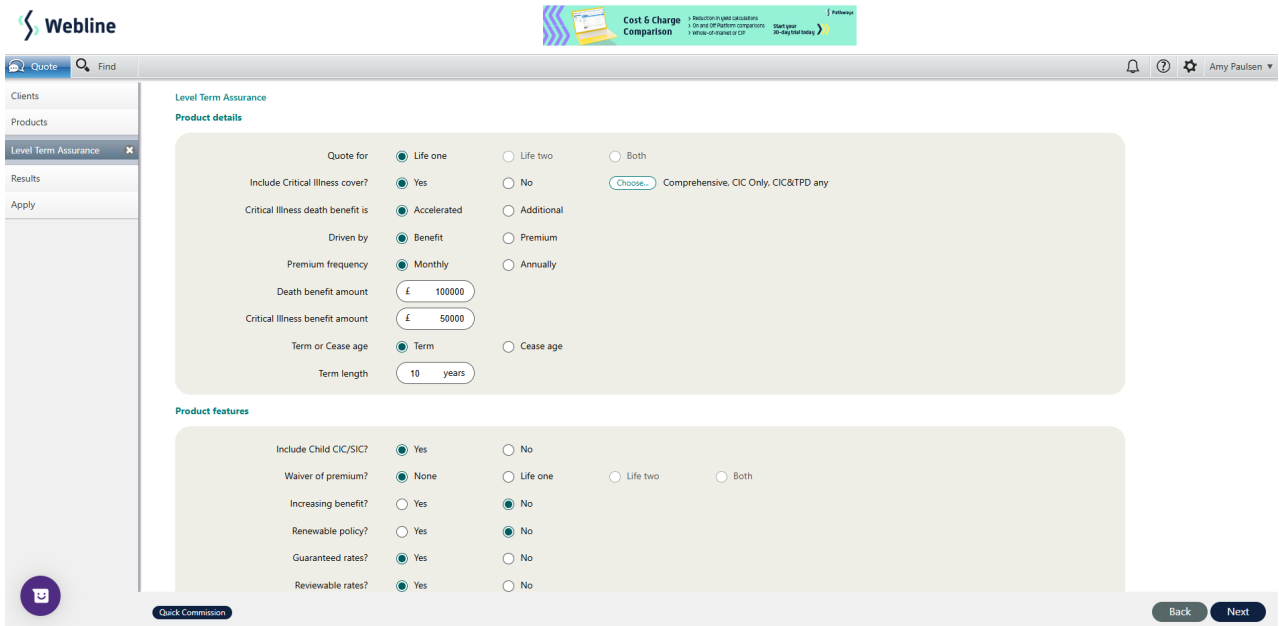
- Comprehensive
- CIC Only
- CIC & TPD (Any Occupation)
- CIC & TPD (Own Occupation)
- CIC & TPD (Suited Occupation)
- TPD Only (Any Occupation)
- TPD Only (Own Occupation)
- TPD Only (Suited Occupation)

The chosen options will then appear as shown below (**Comprehensive, CIC Only** and **CIC&TPD Any** have been selected in this example):

Include Critical Illness cover?	<input checked="" type="radio"/> Yes	<input type="radio"/> No	<input type="button" value="Choose..."/> Comprehensive, CIC Only, CIC&TPD any
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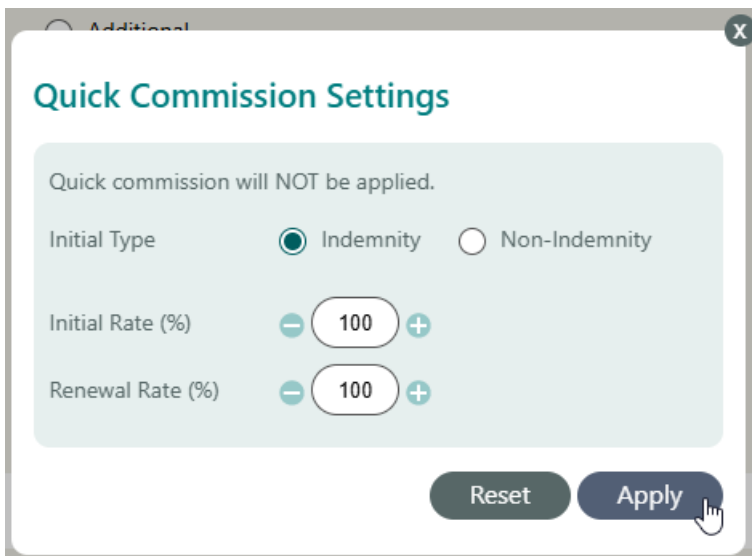
You may make further changes to these options by clicking **“Choose...”** again.

Once all the fields on this page have been entered, use the **next** button at the bottom of the page or click on **Results** on the left hand menu.



On each Product page, there will be a **Quick Commission** button (in the bottom right corner). This enables you to amend the percentage of commission that you want to include on the quotes. This can be used to sacrifice commission. Firstly, choose the **Initial Type** of commission that you will receive.

Amend the **Initial Rate (%)** and **Renewal Rate (%)**. If required and click **Apply**. **Reset** will change the % back to 100%.



If this is being used, please ensure that any quotes printed from Webline are checked to ensure that this sacrifice has been taken into account, before being given to your client.

The following pages will show here the input screen for the product is different to the one shown above.