

Requesting Quotes - Standalone Products

Last Modified on 08/05/2024 9:39 am BST

Standalone Products



Select to obtain quotes for one protection policy with a single benefit

Multi-Benefit Products



Select to obtain quotes for one protection policy with multiple benefits

Select the product(s) to be quoted on. Click into the box at the far right of the line to select the product. When a product type is selected a counter will be displayed allowing you to enter the number of quotes required for each product type. For example, you may wish to do two single life quotes for the client and partner and a joint quote. Therefore, you would need to use the counter to change the number to three separate requests.

Standalone Products



Select to obtain quotes for one protection policy with a single benefit

Multi-Benefit Products



Select to obtain quotes for one protection policy with multiple benefits

<input type="checkbox"/>	All products	
<input checked="" type="checkbox"/>	Level Term Assurance	- 1 +
<input checked="" type="checkbox"/>	Decreasing Term Assurance	- 1 +
<input type="checkbox"/>	Convertible Term Assurance	- 0 +
<input checked="" type="checkbox"/>	Critical Illness Cover	- 1 +
<input type="checkbox"/>	Family Income Benefit	- 0 +
<input checked="" type="checkbox"/>	Income Protection	- 1 +
<input type="checkbox"/>	Whole of Life	- 0 +
<input type="checkbox"/>	Business Protection	- 0 +
Instant Cover Products		
<input type="checkbox"/>	Accident, Sickness & Unemployment	Coming Soon!

If you require a quote for each of the products listed, simply tick **All Products**. This will create one quote for each product type.

The screenshot shows a list of insurance products with checkboxes and quantity counters. A hand cursor is hovering over the 'All products' checkbox. Below the main list is a section for 'Instant Cover Products'.

<input checked="" type="checkbox"/>	All products	
<input checked="" type="checkbox"/>	Level Term Assurance	- 1 +
<input checked="" type="checkbox"/>	Decreasing Term Assurance	- 1 +
<input checked="" type="checkbox"/>	Convertible Term Assurance	- 1 +
<input checked="" type="checkbox"/>	Critical Illness Cover	- 1 +
<input checked="" type="checkbox"/>	Family Income Benefit	- 1 +
<input checked="" type="checkbox"/>	Income Protection	- 1 +
<input checked="" type="checkbox"/>	Whole of Life	- 1 +
<input checked="" type="checkbox"/>	Business Protection	- 1 +
Instant Cover Products		
<input type="checkbox"/>	Accident, Sickness & Unemployment	Coming Soon!

If more are needed, simply hover over the product and the counter will be displayed which will allow you to increase the number (maximum = nine). You may need to use this number in the following situation:

Mr A and Mrs A require life cover and critical illness cover. As an adviser you want to check the following scenarios:

- 1) Life cover for Mr A (no CIC)
- 2) Life cover for Mrs A (no CIC)
- 3) Life cover joint (no CIC)
- 4) Life cover and CIC – comprehensive and TPD own occupation for Mr A
- 5) Life cover and CIC – comprehensive and TPD own occupation for Mrs A
- 6) Life cover and CIC joint – comprehensive and TPD own occupation
- 7) Life cover and CIC for Mr A – TPD any occupation and TPD suited occupation
- 8) Life cover and CIC for Mrs A – TPD any occupation and TPD suited occupation
- 9) Life cover and CIC joint – TPD any occupation and TPD suited occupation

Therefore the counter for life cover will need to show nine. Select the **next** button to move to the quote details input screens.
