

Client Details Standalone Products - Requesting Quotes

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Complete the client details. The name field will do an automatic search as you start typing the name, and any matches for existing clients, will be displayed in a drop-down list under the name field.

Note that as well as client name, their date of birth and smoker status is also shown, helping you to ensure that you are looking at the right client. Either select an existing client or finishing typing the client's forename and surname in full and tab or click to the next field.

The screenshot shows the Weblines interface for entering client details. The top navigation bar includes the Weblines logo, a 'Quote' button, a search bar, and a user profile for Amy Paulsen. A 'Cost & Charge Comparison' banner is visible. The main content area is divided into two sections: 'Life one' and 'Life two', each with a 'Clear' button. The 'Life one' section includes fields for 'New Client' (with a dropdown showing 'Test'), 'Date of Birth' (dd/mm/yyyy), 'Gender' (Male/Female), 'Smoker' (Yes/No), 'Occupation' (with a search dropdown), 'Gross Annual Earnings', and 'Email Address'. It also has a section for height and weight with radio buttons for 'Yes' or 'No' and dropdowns for units (ft/in/cm for height, st/lbs/kgs for weight, in/cm for waist). The 'Life two' section has identical fields. A 'Next' button is located at the bottom right of the form area.

If typing new client details, the occupation will need to be selected from the Weblines list. Once again, start typing the client's occupation and a dropdown list will be displayed with matches. If you cannot find a suitable match, select **unknown occupation** and the quote will be based on a non-hazardous occupation.

Gross Annual Earnings is an optional field; but is required if you wish to quote for Income Protection. Please enter a number greater than 0. The **Gender** and **Smoker** status can be selected by simply clicking on the relevant button and then the chosen option will be highlighted.

The **Email address** is an optional field.

Select **'Yes'** or **'No'** to whether you would like to enter your client's height and weight information. Completing this will return partially underwritten quotes. The waist measurement is optional.

Complete "Life one" details and then record the partner as "Life two" as required. Once completed, click the **next** button to proceed to the next screen.

The Product Selection screen will now display. Select either **"Standalone Products"** or **"Multi-Benefit Products"** to view the product options:

Complete “Life one” details and then record the partner as “Life two” as required. Once completed, click the **next** button to proceed to the next screen.

Life one Clear

New Client

Date of Birth / /
Gender Male Female
Smoker Yes No

Would you like to enter your client's height and weight? Yes No
Height or
Weight or
Waist or

Life two Clear

New Client


Date of Birth / /
Gender Male Female
Smoker Yes No

Would you like to enter your client's height and weight? Yes No
Height or
Weight or
Waist or

Next


The Product Selection screen will now display. Select either “**Standalone Products**” or “**Multi-Benefit Products**” to view the product options:

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

NB: When logging into Weblines Protection via Synaptic, client details already added to Synaptic will be pulled through to Weblines. Client details can be searched within Synaptic and once located, you can proceed to Weblines Protection and client details are pulled through without having to rekey.

Select the product(s) to be quoted on. 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 type="checkbox"/>	Decreasing Term Assurance	-	0
<input type="checkbox"/>	Convertible Term Assurance	-	0
<input type="checkbox"/>	Critical Illness Cover	-	0
<input type="checkbox"/>	Family Income Benefit	-	0
<input type="checkbox"/>	Income Protection	-	0
<input type="checkbox"/>	Whole of Life	-	0
<input type="checkbox"/>	Business Protection	-	0
Instant Cover Products			
<input type="checkbox"/>	Accident, Sickness & Unemployment	-	0

If you require a quote for each of the products listed, simply tick **All Products**. This will create one quote for each product type. 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 for Mr A - comprehensive and TPD own occ
5. Life cover and CIC for Mrs A - comprehensive and TPD own occ
6. Life cover and CIC joint - comprehensive and TPD own occ
7. Life cover and CIC for Mr A - TPD any occ and TPD suited occ
8. Life cover and CIC for Mrs A - TPD any occ and TPD suited occ
9. Life cover and CIC joint - TPD any occ and TOD suited occ

Therefore, the counter for life cover will need to show nine.

Select the next button to move to the quote details input screens.
