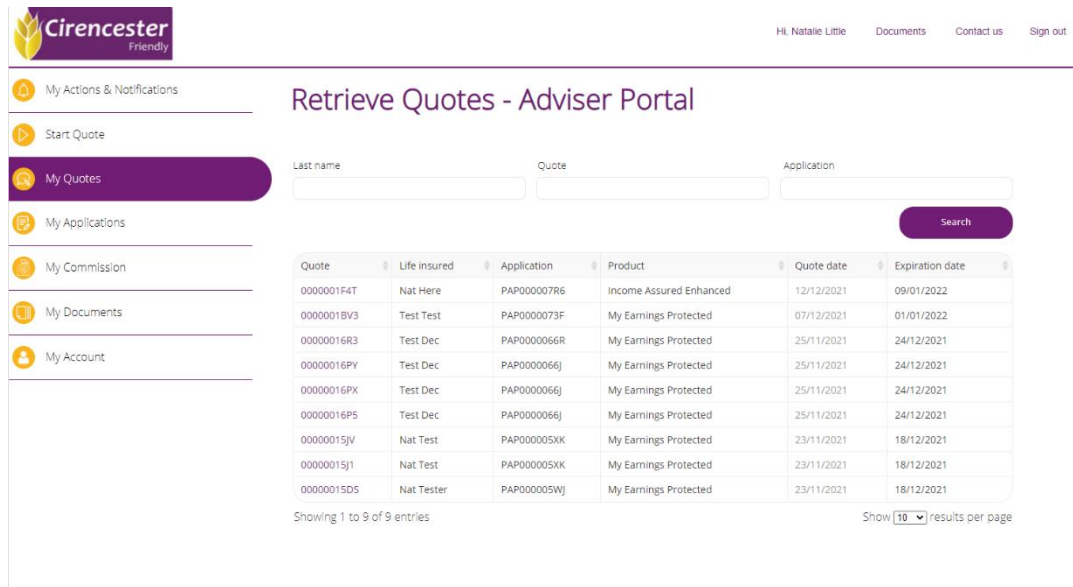


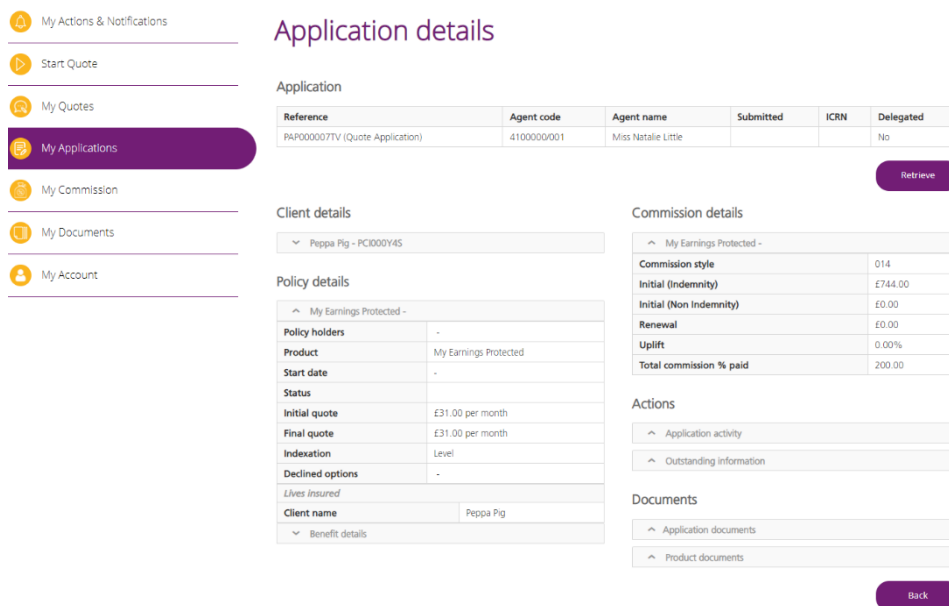
## Managing your quotes

- After logging into the Adviser portal, you will have several options in the side bar on the left. If you click on 'My Quotes', this will provide you with a list of all the quotes you have done.
- You can search for a particular quote using either the applicant's surname, quote reference or the application reference. **[Note: you may quote for both products to compare options (ie cover/premiums), so you may find searching by surname can be more helpful.]**
- You can sort any of the fields to suit your requirements – *as an example if you click the 'quote date' title – it will show either newest to oldest or oldest to newest.*



Quote	Life insured	Application	Product	Quote date	Expiration date
0000001F4T	Nat Here	PAP000007R6	Income Assured Enhanced	12/12/2021	09/01/2022
0000001BV3	Test Test	PAP0000073F	My Earnings Protected	07/11/2021	01/01/2022
00000016R3	Test Dec	PAP0000066R	My Earnings Protected	25/11/2021	24/12/2021
00000016PY	Test Dec	PAP0000066J	My Earnings Protected	25/11/2021	24/12/2021
00000016PX	Test Dec	PAP0000066J	My Earnings Protected	25/11/2021	24/12/2021
00000016P5	Test Dec	PAP0000066J	My Earnings Protected	25/11/2021	24/12/2021
00000015JV	Nat Test	PAP000005XK	My Earnings Protected	23/11/2021	18/12/2021
00000015J1	Nat Test	PAP000005XK	My Earnings Protected	23/11/2021	18/12/2021
00000015D5	Nat Tester	PAP000005WJ	My Earnings Protected	23/11/2021	18/12/2021

- If you want to retrieve/carry on with a quote, you can select the quote from the list by clicking on the 'quote' which will take you to the application details screen. You will then need to click retrieve:



Reference	Agent code	Agent name	Submitted	ICRN	Delegated
PAP000007TV (Quote Application)	4100000001	Miss Natalie Little			No

Policy details	
My Earnings Protected -	
Policy holders	-
Product	My Earnings Protected
Start date	-
Status	
Initial quote	£31.00 per month
Final quote	£31.00 per month
Indexation	Level
Declined options	-
Lives insured	
Client name	Peppa Pig
Benefit details	

Commission details	
My Earnings Protected -	
Commission style	014
Initial (Indemnity)	£744.00
Initial (Non Indemnity)	£0.00
Renewal	£0.00
Uplift	0.00%
Total commission % paid	200.00

- Once you have clicked retrieve, you will be taken to the quote summary screen to carry on with the quote/application journey:

The screenshot displays the 'Quote Summary' page for Cirencester Friendly. The header includes the logo and navigation links: 'Hi, Natalie Little', 'Documents', 'Contact us', and 'Save & exit'. The left sidebar contains a progress menu with items: 'Your Quote' (active), 'Applicant Details', 'Underwriting', 'Application Summary', 'Decision', 'Payment', 'Nominee Details', 'Start Date', and 'Confirmation'. The main content area is titled 'Quote Summary' and features a table with the following data:

Quote reference	0000001FM8	Total monthly premium	<b>£31.00</b>
Number of policies	1		
Application reference	PAP000007TV		<a href="#">Quote illustration</a>
Quote expiration date	09/01/2022		

Below the table is a yellow 'Add additional features' section. It includes 'My Extra Benefits' (Fracture & Hospitalisation Benefit and/or Immediate Death Benefit) and 'Severe Injury Cover' (enhancing the contract by selecting to include Severe Injury Cover as well as My Extra Benefits). A button 'Add these features' is present.

The 'My Earnings Protected' section shows a premium of £31.00 per month. It includes a dropdown for 'Peppa Pig' and details: 'Contract term To age 65' and 'Deferred period 4 week(s)'. Links for 'Key features' and 'T&C' are also visible.

At the bottom left, a purple box displays application details: 'Application reference: PAP000007TV', 'Lives Insured: 1', 'Peppa Pig', 'Female', '05/05/1985', and 'Non-Smoker'.

## Managing your applications

- Within the Adviser portal, if you select the 'My Applications' section on the left-hand side, you will be able to see all applications that you have submitted through the adviser portal.
- You will be able to search via last name, application reference, application type and status.

**Tracking Overview - Adviser Portal**

My applications (6) My watchlist (0)

Last Name Application Application type Status

Search

Application	Life Insured	Product	Premium	Initial com.	Status	Updated	Watch
PAP000007TK	Mr Monday Wheels	My Earnings Protected	-	-	Declined	13/12/2021	<input checked="" type="checkbox"/>
PAP000007RS	Miss Monday Test	My Earnings Protected	£99.22	£1945.36	Accepted - Non Standard	14/12/2021	<input checked="" type="checkbox"/>
PAP000008MK	Mr Test Fail	My Earnings Protected	-	-	In Underwriting	23/12/2021	<input checked="" type="checkbox"/>
PAP000008WY	Mr Test Monday	My Earnings Protected	-	-	In Underwriting	10/01/2022	<input checked="" type="checkbox"/>
PAP000009D7	Miss Natalie Weds	My Earnings Protected	£25.12	£17.58	Accepted	19/01/2022	<input checked="" type="checkbox"/>
PAP0000093S	Miss Natalie Wednesday-DDM	Income Assured Enhanced	£28.78	£654.72	Accepted	19/01/2022	<input checked="" type="checkbox"/>

Showing 1 to 6 of 6 entries Show 10 results per page

- These applications can be sorted by clicking on one of the subheadings -*as an example if you click the 'updated' title – it will show either newest to oldest or oldest to newest.*
- Within the 'My Applications' section, you will be able to see the status of your applications. This includes any applications that have been declined, are with underwriting, have been accepted with or without exclusions (standard/ordinary rates & non standard) or have been issued (contract documents issued).

**Application details**

Application

Reference	Agent code	Agent name	Submitted	ICRN	Delegated
PAF000007RS (Quote Application)	4100000/001	Miss Natalie Little	11/12/2021		No

Retrieve

Client details

Miss Monday Test - PCI000Y3M

Gender	Female
Date of birth	31/07/1990
Occupation	Meter Reader
Smoker status	Never used
Day phone	07580138059
Evening phone	-
Mobile phone	07580138059
Email	nats3107+5@gmail.com
Current address	Show

Commission details

My Earnings Protected - PR0000002P7

Commission style	014
Initial (Indemnity)	£1,945.36
Initial (Non Indemnity)	£0.00
Renewal	£0.00
Uplift	0.00%
Total commission % paid	165.00

Policy details

My Earnings Protected - PR0000002P7

Policy holders	Miss Monday Test
Product	My Earnings Protected
Start date	-

Actions

Application activity

Outstanding information

Product	Requires	Expiration Date
My Earnings Protected - PR0000002P7	Provide payment details	10/03/2022
My Earnings Protected - PR0000002P7	Provide Start Date	10/03/2022

- The application details screen links into the 'My Actions & Notifications' screen, as anything that needs actioning you will receive a notification for.
- If you click on the application reference, it will take you to the application details screen. **[Note: if the retrieve button is showing, you will be able to finish the application (if incomplete) or you will be able to provide bank details/a start date to complete the application journey].**

Application	Life insured	Product	Premium	Initial com.	Status	Updated	Watch
PAP00000766	Mr Test Tuesday	Income Assured Enhanced	£32.50	£744.00	Issued - Non Standard	07/12/2021	✓
PAP00000759	Mr Wednesday Test	Income Assured Enhanced	-	-	Declined	07/12/2021	✓
PAP0000071W	Miss Test Evening	My Earnings Protected	£23.61	£530.64	Issued	06/12/2021	✓
PAP0000070M	Miss Test December	My Earnings Protected	-	-	Incomplete Pre-Decision	06/12/2021	✓
PAP0000070H	Miss Nat December	Income Assured Enhanced	-	-	In Underwriting	06/12/2021	✓
PAP0000066G	Miss Dec Test	My Earnings Protected	-	-	In Underwriting	25/11/2021	✓
PAP00000646	Miss Nov Test	My Earnings Protected	£54.64	£1038.67	Issued	25/11/2021	✓
PAP0000062S	Miss Test Nat	My Earnings Protected	-	-	Declined	24/11/2021	✓
PAP0000052W	Miss Nat Test	My Earnings Protected	-	-	Incomplete Pre-Decision	24/11/2021	✓

- Any correspondence relating to an application will be shown in the 'My Documents' section of the Adviser portal, under the application tab. Within this screen you will be able to search via application reference, Adviser and date selection.

Document	Adviser	Client name	Reference	Date	PDF
Quote illustration	Natalie Little	Nat Here	PAP00000766	11/12/2021	PDF
Personal Details Confirmation	Natalie Little	Mr Test Tuesday	PAP00000766	05/12/2021	PDF
Personal Details Confirmation Letter	Natalie Little	Mr Test Tuesday	PAP00000766	05/12/2021	PDF
MEB Schedule 4	Natalie Little	Mr Test Tuesday	PAP00000766	05/12/2021	PDF
Key Features	Natalie Little	Mr Test Tuesday	PAP00000766	05/12/2021	PDF
Memorandum and Rules	Natalie Little	Mr Test Tuesday	PAP00000766	05/12/2021	PDF
Policy Schedule	Natalie Little	Mr Test Tuesday	PAP00000766	05/12/2021	PDF
Confirmation of terms	Natalie Little	Mr Test Tuesday	PAP00000766	05/12/2021	PDF
Application summary	Natalie Little	Mr Test Tuesday	PAP00000766	05/12/2021	PDF
Quote illustration	Natalie Little	Test Tuesday	PAP00000766	05/12/2021	PDF

## Managing your contracts

- Within the 'My Documents' section, there is a contracts tab, this is where you will be able to see the contract documents of your 'issued' applications.

Hi, Natalie Little Documents Contact us Sign out

### Documents - Adviser Portal

Application Contract Advisor

Reference:  Advisor:  From date: 01/12/2021 To date: 01/01/2022 Search

Document	Advisor	Client name	Reference	Date	PDF
Personal Details Confirmation	Natalie Little	Mr Test Tuesday	PR0000002G5	05/12/2021	
Personal Details Confirmation Letter	Natalie Little	Mr Test Tuesday	PR0000002G5	05/12/2021	
MEB Schedule 4	Natalie Little	Mr Test Tuesday	PR0000002G5	05/12/2021	
Key Features	Natalie Little	Mr Test Tuesday	PR0000002G5	05/12/2021	
Memorandum and Rules	Natalie Little	Mr Test Tuesday	PR0000002G5	05/12/2021	
Policy Schedule	Natalie Little	Mr Test Tuesday	PR0000002G5	05/12/2021	
Confirmation of terms	Natalie Little	Mr Test Tuesday	PR0000002G5	05/12/2021	
Personal Details Confirmation	Natalie Little	Miss Test Evening	PR0000002F4	05/12/2021	
Personal Details Confirmation Letter	Natalie Little	Miss Test Evening	PR0000002F4	05/12/2021	
MEB Schedule 4	Natalie Little	Miss Test Evening	PR0000002F4	05/12/2021	

Showing 1 to 10 of 14 entries Show 10 results per page

- To make any amendments to your client's contract, you will need to call **Member Services on 0800 587 5098** and go through the amendment process over the telephone.