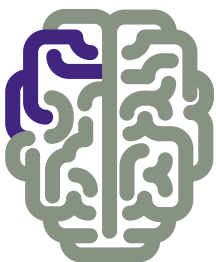


User Guide

Applying for a Product online with Webline



Applying for a Product “online” with Webline

Once you and your client have chosen your desired product from Webline’s comparison results table you can proceed to apply for it simply by clicking the “Buy Now” Button.

Make sure you check that the “E-apply” column has a tick in it.

This confirms that it is an electronic product and therefore can be applied for “online”. Remember that Webline gets paid no commission, so you will receive your normal commission payment from the provider. In fact, several providers even offer you an incentive for applying “online” by paying you an additional amount!

Resp	Empid	AT	Docs	Provider	Product	Benefit	Ratio	Amount	E-apply	Notes	Comm	Apply
14144413L	0		Docs	AGD	Low Start Term Assurance	£100,000.00	Guaranteed	£7.82	<input type="checkbox"/>	(none)	(none)	Buy Now
14144427L	1		Docs	Legal & General	Term - Electronic	£100,000.00	Guaranteed	£11.98	<input checked="" type="checkbox"/>	(none)	(none)	Buy Now
14144415L	1		Docs	Legal & General	Single-Event Term - Electronic	£100,000.00	Guaranteed	£11.98	<input checked="" type="checkbox"/>	(none)	(none)	Buy Now
14144405L	1		Docs	Legal & General	Term	£100,000.00	Guaranteed	£11.98	<input type="checkbox"/>	(none)	(none)	Buy Now
14144410L	0		Docs	Old Mutual Wealth	Protect Fixed Term	£100,000.00	Guaranteed	£13.24	<input type="checkbox"/>	(none)	(none)	Buy Now
14144408L	0		Docs	LIFE	PPF Cash	£100,000.00	Guaranteed	£13.35	<input checked="" type="checkbox"/>	(none)	(none)	Buy Now

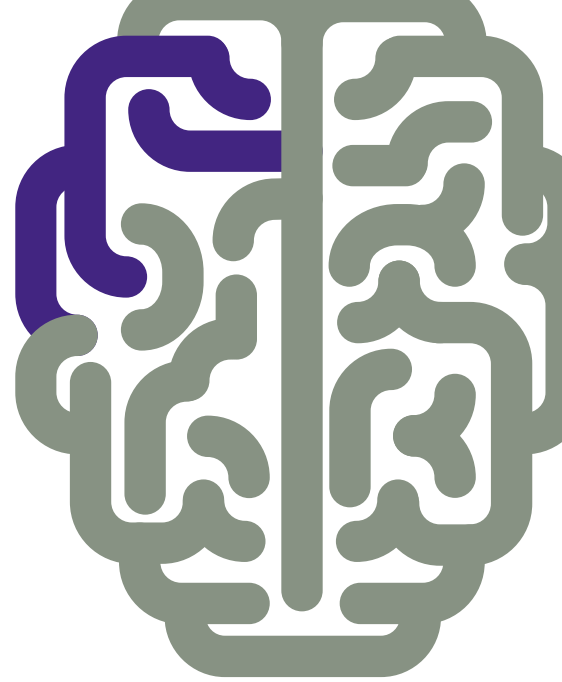
In order to generate a personalised illustration, Webline now requires you to enter your client’s details. Once you have done so click “Proceed”.

This takes you through to the final part of your quote which bridges you from Webline to the online application form on your chosen provider’s extranet.

The top section of this screen offers any documentation related to the product you are applying for, including the personalised illustration. The middle section is to check that you have gone over these documents with your client. And finally the bottom section opens up a gateway to the provider’s extranet where you can apply for the product.

Providers require you to have login details for their extranet application forms. You can obtain this from the providers themselves. Some use passwords, and some use Unipass certificates – Webline works with both.

Clicking “Continue” carries you and your previously entered client data over to the providers extranet, so that you can login to the extranet and apply for the product. Webline’s automated pre-population of client and quote data in to the forms means that you no longer have to waste time rekeying all of the information again – much of this is passed by Webline into the provider’s forms, speeding up the process and reducing errors.



Products & Services from Synaptic Software:

SYNAPTIC **CLIENT CARE**

SYNAPTIC **COMPARATOR**

SYNAPTIC **MODELLER**

SYNAPTIC **PRODUCT & FUND**

SYNAPTIC **RISK**

SYNAPTIC **WEBLINE**

SYNAPTIC **WEB SERVICES**



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