

PARADIGM

THE FUTURE OF FINANCIAL INTERMEDIARIES

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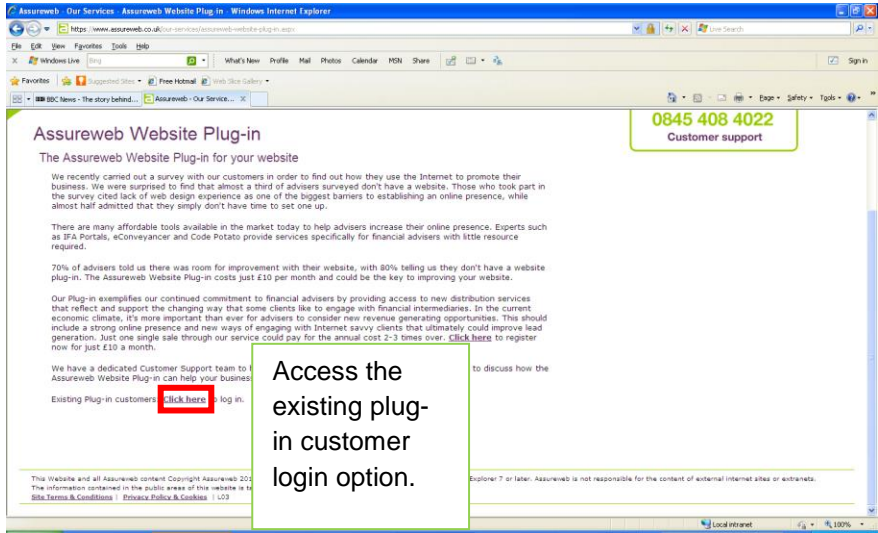
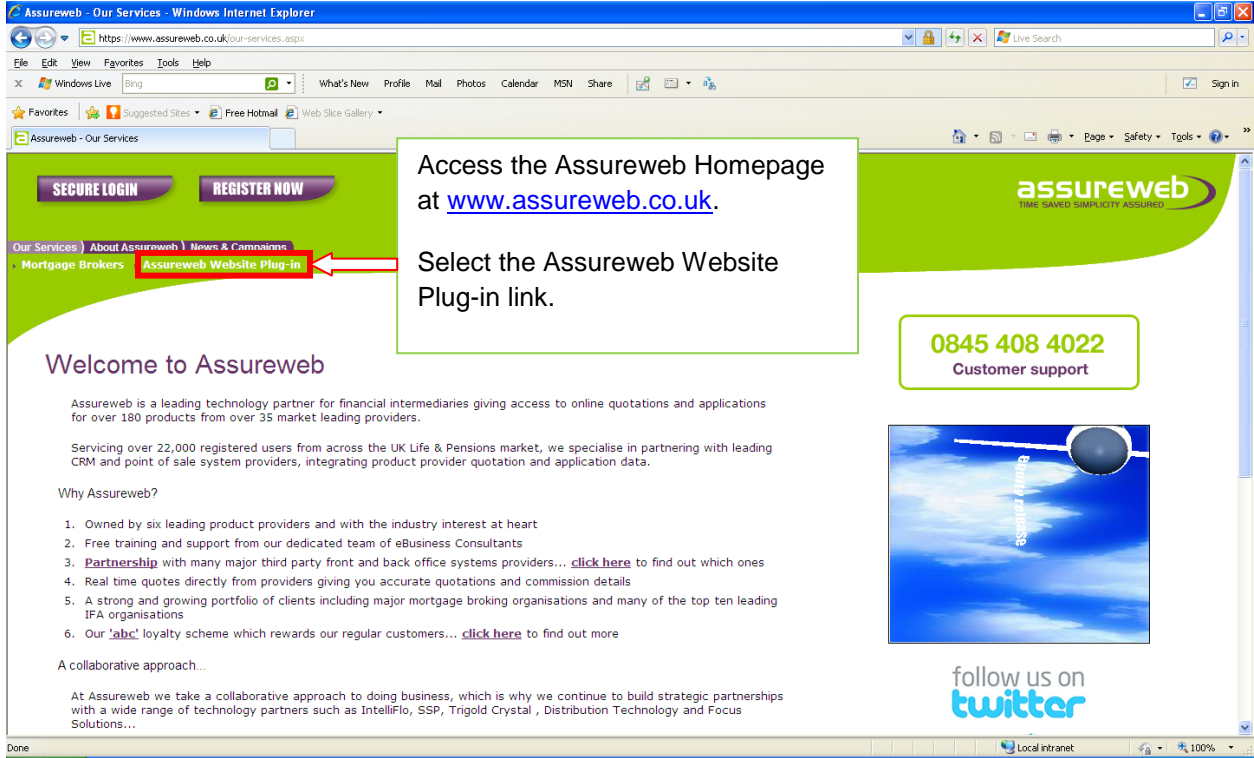
## Set up Guide

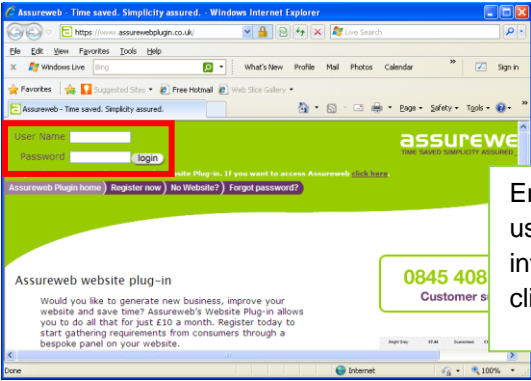
### Assureweb Website Plug-in



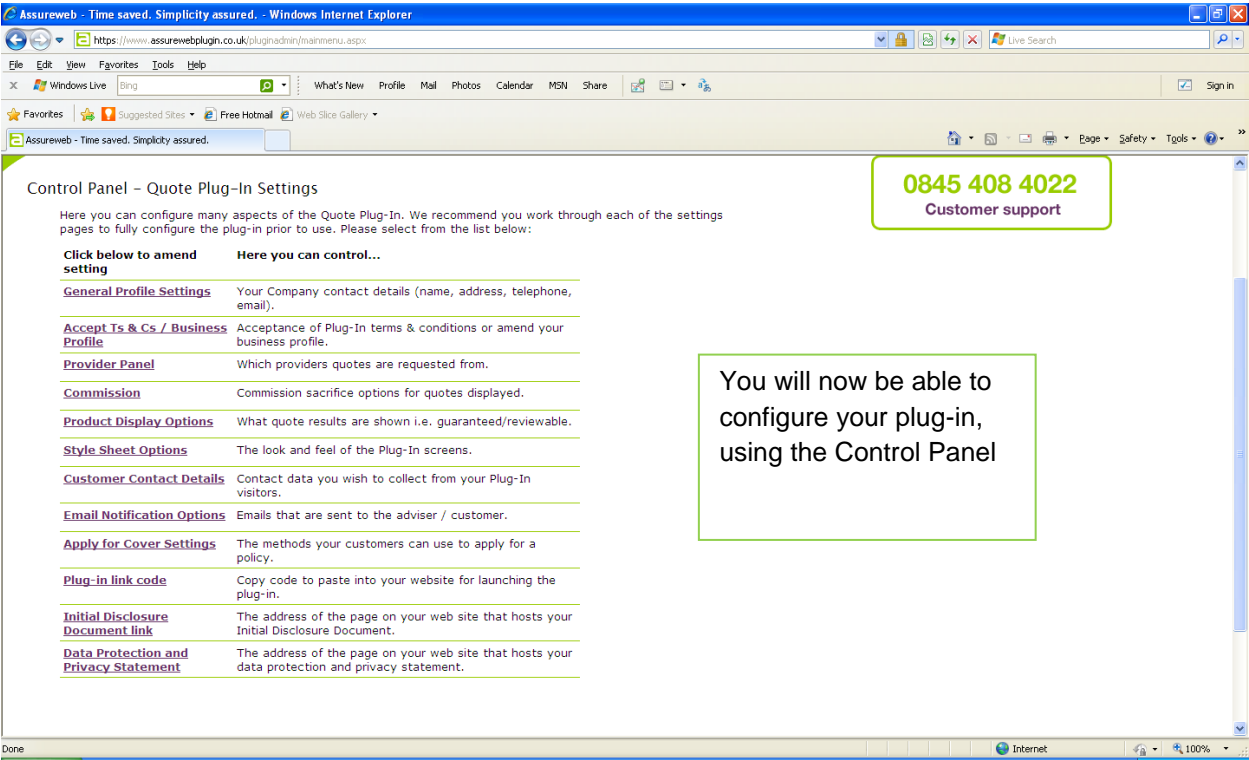
### Set Up Guide

Once your registration has been completed your account details will be emailed to you. These will allow you to login to start accessing and configuring your plug-in.





Enter your emailed Plug-in username and password into the relevant fields and click login.



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You will now be able to configure your plug-in, using the Control Panel

The Control Panel

Remember to click Save when making any of the changes detailed below.

The General Profile Settings gives you access to update your contact details. The Assureweb account linked to the plugin is visible.

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**General Profile Settings**

The Assureweb User ID linked to this plug-in account is:  
Assureweb User name |web421480|  
[Click here](#) to log on to Assureweb.

Your business type may be either Designated Investment or General Insurance. This affects the products returned from Assureweb.  
Currently your business type is registered as: Designated Investment. To change this, you need to generate a new User ID.

You can update your contact details below.

Title: Miss Telephone: 012012012  
 Contact first name: Example Fax:  
 Contact last name: Example Email: kate.buckley@assure  
 Company name:  
 Address: the street

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**Provider Panel**

Select the providers you wish to have displayed to your web visitors within the quote plug-in. Please note that although a full list of providers is displayed below, quotes will only be returned by insurers with whom you hold a valid agency:

By default, your panel has a full set of providers. Untick the providers you wish to remove and click Save.

- AEGON Scottish Equitable
- Ageas
- Aviva
- Bright Grey
- Friends Life Individual Protection
- Legal and General
- LV=
- PruProtect
- Scottish Provident
- Zurich

Save Back to plug-in settings

Please ensure that the Providers match your Paradigm Protection Proposition, Elite or Preferred panel.

The Elite panel: Aegon, Bright Grey, Friends Life, L&G, Scottish Provident.

The Preferred panel: Aegon, Ageas, Aviva, Bright grey, Friends Life Individual Protection, L&G, LV, Pruprotect, Scottish Provident, Zurich.

**Commission Settings**

Please indicate your default commission settings for quotes displayed to your web visitors using the quotes plug-in. Remember to click 'Save' after making your selections:

Full Commission  No Commission

If you wish to use any of the commission sacrifice options below, you must also specify your full Aviva Lauto rate in order for the correct discount to be applied to quotes for this insurer. Please specify your Aviva Lauto rate here e.g 160:

Fixed Discount Basis. Retain  % of actual commission (0-100).

Target Initial Commission Basis. Cheapest quotes on comparison to produce around £  initial commission. If the initial commission is less than target figure then full commission will be taken. Please note that using this option will mean the quote results can take up to twice as long to be displayed because two comparisons must be performed. Each quote request will also count as two towards your monthly limit of 5000 quotes.

Renewal Commission  Tick this box to sacrifice all renewal commission where possible. This will not affect initial commission.

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Commission sacrifice options are available, as well as an option to enter a minimum commission amount.

**Product Display Defaults**

Please place a tick next to your chosen default display settings for quotes generated within the web plug-in. Remember to click 'Save' after making your selections:

**Guaranteed/Reviewable Premium Types**

Show all quotation results  Show Guaranteed only  Show Reviewable only

**Provider Name Display**

Show provider names  Hide provider names

**Provider Logo Display**

Show provider logos  Hide provider logos

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Preferences regarding product and provider displays can be selected.

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https://www.assurewebplugin.co.uk/pluginadmin/styleSheet.aspx

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### Style Sheet Options

These options should only be amended by an IT expert. Changes will affect the look and feel of all pages within the quote plug-in. An IT expert can amend fonts, colours and many other aspects of the plug-in to match your website by downloading a copy style sheet for amendment, and then specifying a location of the new version.

Please remember to click 'Save' once you have made your selections:

- Use default style sheet
- Use style sheet in query string (select this if you are a Sesame user)
- Specify style sheet location:

[Click here](#) to download a copy of a basic style sheet if you wish to make changes to and specify your own style sheet location.

Please note, certain style sheet settings may cause issues affecting the readability of text in the plug-in. We strongly recommend checking the plug-in after changing the style sheet and/or style sheet settings. If you are not happy with the design, select the default style sheet and review the style sheet you wish to use or have one professionally created.

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Style Sheet options should only be amended by an IT expert to match the look and feel of your plug-in with your website.

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### Customer Contact Details

What contact data would you like to collect from customers obtaining quotes from the quote plug-in?

If you opt to collect contact information then this will be requested whilst the quote request is being processed and this will help pass the time whilst the results are being collected from insurers. You can choose which data fields are mandatory for your web visitors to complete using the options below. Remember to click 'Save' after making your selections:

None, do not display contact details page.  Collect contact information.

Show email address field.	<input type="checkbox"/>	Make mandatory.	<input type="checkbox"/>
Show postal address fields	<input type="checkbox"/>	Make mandatory.	<input type="checkbox"/>
Show home telephone field.	<input type="checkbox"/>	Make mandatory.	<input type="checkbox"/>
Show work telephone field.	<input type="checkbox"/>	Make mandatory.	<input type="checkbox"/>
Show mobile telephone field.	<input type="checkbox"/>	Make mandatory.	<input type="checkbox"/>

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Select the fields that you would like to make mandatory for the customer to complete before obtaining the quote.

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### Email Notification Options

What emails would you like sending to yourselves and to your clients following use of the quote plug-in. Remember to click 'Save' after making your selections:

- Email the customer after a comparison is generated (if client has provided email address) [View Sample](#)
- Receive an adviser email when a customer obtains a comparison quote. [View Sample](#)
- Receive an adviser email when a customer clicks 'Apply' [View Sample](#)

You will automatically be emailed if a client requests an application pack by post. [View Sample](#)

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Decide which emails you would like to receive and have sent to the customer using your plug-in.

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https://www.assurewebplugin.co.uk/pluginadmin/applysettings.aspx

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### Apply for Cover Settings

Please indicate the options you would like present to customers who click 'Apply' within the quote plug-in:

- "Click here to request an application pack."
- Type instructions for the customer on how to contact you to apply i.e. call the telephone number of your call centre: "To apply for cover at the quoted price please..."

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Select the process to be followed once the customer clicks on Apply.

Options include the customer selected to receive an application pack. Alternatively you may type in your message informing the customer of the next step.

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https://www.assurewebplugin.co.uk/pluginadmin/pluginLink.aspx

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### Plug-in Link Code

Copy the link below and paste this into your website. This can be used as a standard link or in an IFrame. You can also test your plug-in using the "Get a Quotation" link below:

Link URL:

Example [Get a quotation](#)

[Back to plug-in settings](#)

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Collect the plug-in link code to be added to your website.

Use the Get a quotation link to test your configured settings.

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https://www.assurewebplugin.co.uk/pluginadmin/iddlink.aspx

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### Initial Disclosure Document Link

This setting should only be amended by an IT expert. Enter the URL of the page on your web site that contains your Initial Disclosure Document, Terms of Business and associated documents.

Please remember to click 'Save' once you have made your selections:

[Save](#) [Back to plug-in settings](#)

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You may add a link to your IDD stored on a different page within your website.

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### Data Protection and Privacy Statement

Please remember to click 'Save' once you have made your selections:

- Place a tick here if you wish to use the default data protection and privacy statement text as shown below:  
"We undertake to comply at all times with the Data Protection Act 1998 when processing any personal data relating to you. The information that you supply will be used by us, our insurance associates and technology partners to provide you with quotations, products and services. You agree that we may hold this information, which may include sensitive data as defined under the Data Protection Act 1998. Your information may be used for statistical and research purposes such as site traffic reports or to enhance or develop future products and services. We respect your privacy and we will not sell your personal data to any third parties. By proceeding to obtain quotations, you agree that you have read and understood the above statement."
- Place a tick here if you wish to use your own data protection and privacy statement, then enter the URL link of either the page or document on your website that contains those statements. This setting should be amended with the assistance of an IT expert.

Please remember to click 'Save' once you have made your selections:

Save Back to plug-in settings

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Select either the default Data Protection and Privacy statement or add the URL link to the document stored elsewhere on your website.

Done Internet 100%