

PARADIGM

THE FUTURE OF FINANCIAL INTERMEDIARIES

**assureweb**  
TIME SAVED SIMPLICITY ASSURED

# User Guide

## Assureweb Website Plug-in

## User Guide for Lead Generation and Fulfilment

- Please follow the steps in the Registration document to register for your Assureweb Website Quote Plug-in
- The Set Up document will take you through the various configuration options that are available to you
- This guide will now take you through how to get the most from your plug-in.

## Introduction

People are using the Internet more and more to find out the information they want regarding financial products. They often like to do their initial research on the Internet before turning to professional financial advice for the final part of the decision making process. This is where the Assureweb Website Plug-in solution can help.

One of the biggest benefits of a plug-in is that it allows an intermediary to capture the details of these prospective clients who visit their websites to generate comparative quotes. Client contact information will be emailed to the intermediary's email address, who can then follow up the sales leads.

Example IFA Website

Home | About Us | Contact Us | Glossary | Life Insurance Help | Other Products

This is an example of the plug-in embedded within a website >>

### Life Assurance Quotations

**Policy Details:**

Product Type:  Level Term Life Assurance

Level of cover: £  or tick  to specify the premium you wish to pay. [What is this?](#)

Term:  years [What is this?](#)

Include Critical Illness:  No  Yes [What is this?](#)

Indexation:  No  Yes... [What is this?](#)

Waiver of Premium:  No  Yes... [What is this?](#)

Premium Frequency:  Monthly  Annual [What is this?](#)

Premium Type:  All  Guaranteed Only  Reviewable Only [What is this?](#)



### Email Notification

Through the Plug-in Control Panel you will be able to set up Email Notification Options. These include the option to email the customer a copy of the comparison obtained, as shown below.

[Subject: Your life insurance quotation <- this is the subject line of the email and does not appear in the main body.]

**Life Insurance Quotations**

Your quotation results are shown below. Please read the relevant 'Key Features' and 'Quotation' documents carefully to compare the various policies available. If you would like further quotations on a different basis please [click here](#).

Please click 'Apply' to view the options for arranging cover at the quoted price.

Quote Ref	Insurer	Premium	Premium Type	Cover	Documents		
Q065180	AXA Protect	£24.62	Guaranteed	£250000	<a href="#">Key Features</a>	<a href="#">Detailed Quote</a>	<a href="#">Apply</a>
Q065184	Norwich Union	£24.75	Guaranteed	£250000	<a href="#">Key Features</a>	<a href="#">Detailed Quote</a>	<a href="#">Apply</a>
Q065179	Standard Life	£25.45	Guaranteed	£250000	<a href="#">Key Features</a>	<a href="#">Detailed Quote</a>	<a href="#">Apply</a>

The above quotes are only available to UK residents and are based on the following input: Mr John Test Male, non-smoker, dob: 02/06/1971. Level term insurance without critical illness for 27 years. Cover amount: £250000. Options included: none. Premiums payable: monthly.

Whichever policy you apply for remember that it is important to keep a copy of the key features document and illustration for future reference.

Test Company Ltd, 1 Test Road, Test Town, TE1 1RT. Tel:01234 897444. Fax: 01234 897445. Email: test@test.com. FSA No. 213208

Test Company Ltd is authorised and regulated by the Financial Services Authority.

Test Company Ltd. Registered address: 1 Test Road, Test Town, TE1 1RT. Registered in England and Wales No 123456

An email can also be sent to the Adviser when a customer has completed a comparison quote, as shown below. The Adviser will be able to see the quote input details along with the customer's contact details., as configured in the Control Panel. The Adviser email will also contain links to open the comparison, as seen by the customer. As well as the full comparison option, the email contains links to the Providers' Extranets, enabling a seamless way to apply online for a product.

[Subject: Web site customer COMPARISON QUOTE] <- this is the subject line of the email and does not appear in the main body.

A customer has obtained a COMPARISON QUOTE on your web site for the quotation shown below.

**First Life**

Title: Mrs  
 First Name: Jenny  
 Last Name: Test  
 Smoker: False  
 DOB: 17/08/1970  
 Gender: Female

**Policy Basis**

Level term insurance without critical illness for 10 years. Cover amount: £10000. Options included: none. Premiums payable: monthly.

**Contact details**

Address:  
 11 Test Road  
 London  
 E1 1EE

**Email**

test111@yahoo.com

**Day time telephone**

0181 456 7890

**Evening telephone**

0181 111 2222

[Customers Comparison Results](#) (what the customer saw)

[Full Comparison Results](#) (includes links to providers extranets etc)

- PDF Files**
- [PDF - Illustration](#)
  - [PDF - Technical Document](#)
  - [PDF - Key Features Document](#)
  - [PDF - Application Form](#)

A third emailing option can send an Email to the Adviser once the customer has clicked the Apply button. The Plug-in Control Panel (please see the Set Up Guide) will allow you to set up your own process for when the customer clicks the Apply button, this done through the Apply for Cover Settings option. There is an option to allow a customer to request an application pack to apply or an option to enter instructions for the customer to follow when they click Apply. Alternatively, you may use this field to inform the customer that you will now contact them to complete the application form.

[Subject: Web site customer application notification] << this is the subject line of the email and does not appear in the main body.

A customer has applied for a policy on the web site with the following details:

FirstLife

Title: Mr  
First Name: John  
Last Name: Test  
Smoker: False  
DOB: 02/08/1971  
Gender: M

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Policy Basis

Level term insurance without critical illness for 27 years.  
Cover amount: £250000  
Options included: none  
Premiums payable: monthly.

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Contact details

Address:  
Test Street  
  
Test Town  
Test County  
TS1 1ST

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Email: customer@test.co.uk

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Day time telephone: 01234 567890  
Evening telephone: 01234 567890

Quotation Info

Insurer: AXA Protect. Premium: £24.62. Premium type: Guaranteed  
Commission amount: 299.  
Commission notes: Initial commission: GBP 299.26 will be paid immediately. Renewal commission: GBP 0.62 p.m. will be paid for the duration of the Cover, starting from month 49. Any commission sacrifice has been taken into account within the commission figures.  
Commission percentage: 50.  
Product description: Axa Protection Account.

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Customer's Comparison

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Illustration

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PDFs  
[Application Form](#)  
[Key Features](#)

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Use the following link to view/refine the quote, and apply via eForm or Extranet, pre-populating data from this quote into the application form where available.  
[Apply via Assureweb](#)

If you would like any further assistance or advice on any of these options, please contact Assureweb on [customer.services@assureweb.co.uk](mailto:customer.services@assureweb.co.uk) or call on 0845 408 4022.