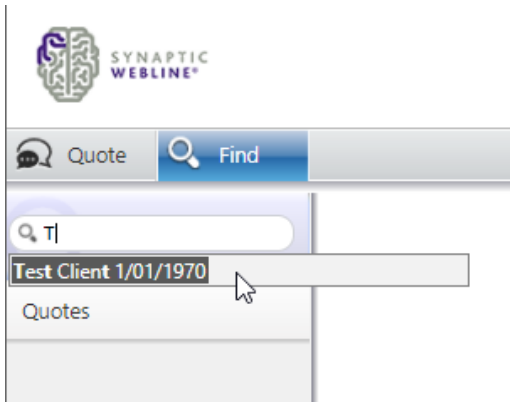


Finding Quotes

Last Modified on 28/05/2021 3:40 pm BST

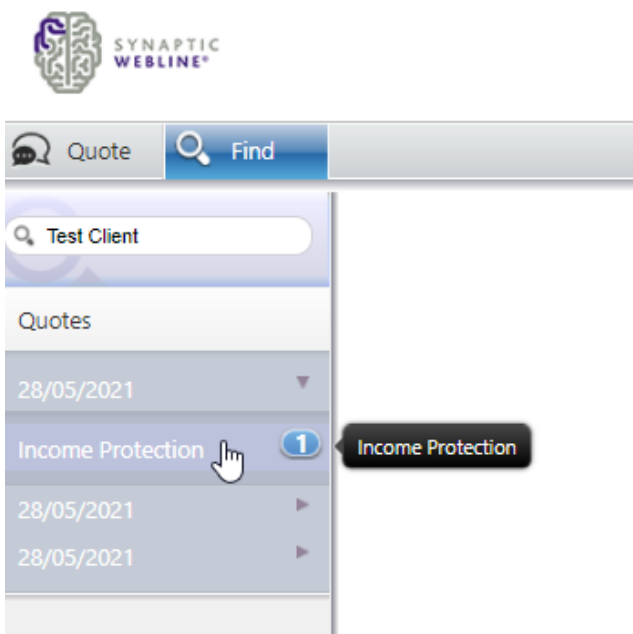
All pieces of work are automatically saved when working through Weblines. If you wish to recall a quote which you did previously, click on the **Find** button at the top left of the screen. Find becomes highlighted and a small Search box opens, in which you may type part (or all) of a client's name.



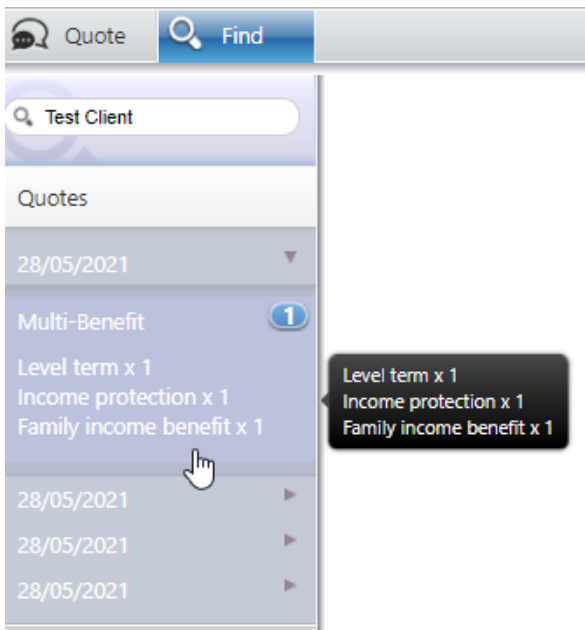
When searching using the client's name, possible matches will appear as you type for you to select the relevant client. A list of dates will then appear, from which you can select the date when the quote(s) was (were) created.

For the selected date, a list of quotes will be displayed for that client, separated in to product type. To view some basic details of the quote, click on the number.


The following screen if relevant to a Standalone quote:



The following screen if relevant to a Multi Benefit quote:



You can load the quote by clicking on the basic details of the quote. Webline will show this screen for the Standalone option:



Coming soon...
 Accident, Sickness, and Unemployment cover launching on Synaptic Webline
 REGISTER FOR YOUR FREE AGENCY CODE

Quote	Find	Quote Details	Payment Period	Benefit	13 weeks
Test Client		Cease age 60 Monthly Benefit (maximum allowed)	Includes Test Client	Reviewable and Guaranteed Monthly premiums	Click reload or quote to access this quote
Partially Underwritten Quotes					
AVIVA		Income Protection- 2 year payment <ul style="list-style-type: none"> Global Treatment available at £4 per month Fracture Cover available at £4 per month 	BMI 24 months	£1,083 Reviewable	£31.68 Standard rate : £31.68
		See more products from Aviva	Premiums ranging from £31.68 - £54.92		
ZURICH		2 year Income Protection	BMI 24 months	£1,150 Guaranteed	£32.68 Standard rate : £32.68
		See more products from Zurich	Premiums ranging from £32.68 - £84.62		
Standard Quotes					
BRITISH FRIENDLY		BFS Protect (Short Term, Payment Period 1 Year)	12 months	£1,167 Guaranteed	£18.20
		See more products from British Friendly	Premiums ranging from £18.20 - £69.18		
Holloway Friendly		Short Term Income Protection Plan 1 yr	12 months	£1,000 Guaranteed	£19.73
		See more products from Holloway Friendly	Premiums ranging from £19.73 - £42.37		
Legal & General		Rental Income Protection (1 year) <ul style="list-style-type: none"> Includes option to increase cover if rent increases and a 'switch' option if cease renting and take out a mortgage (terms and conditions apply) Own occupation definition, benefit payable for maximum 12 months for any single claim Choice of 6 deferred periods, £1,500 Income Guarantee, 12 month linked claims, Rehabilitation benefit 	12 months	£1,000 Guaranteed	£22.25
		See more products from Legal & General	Premiums ranging from £22.25 - £46.21		

And this screen for the Multi Benefit option:

Quote Find Amy Wood

Test Client Click reload or quote to access this quote

Benefit	Life one	Benefit	Term
Benefit 1: Level term	Life one	Benefit £100,000.00	Term 10 years
Benefit 2: Income protection	Life one	Benefit £1,000.00 pcm	Cease 60 years
Benefit 3: Family income benefit	Life one	Benefit £10,000.00	Term 10 years

Quotes	Provider	Product Details	Premium	Info	Apply
28/05/2021	Partially Underwritten Quotes				
Multi-Benefit		ALPS Upgraded CI/No Child Upgrade/Living Costs Level term x 1 Income protection x 1 Family income benefit x 1 > More details	BMI £53.51 Standard rate : £53.51	V D £	
Level term x 1		ALPS Upgraded CI with Child Upgrade/Living Costs > More details	BMI £53.51 Standard rate : £53.51	V D £	
Income protection x 1		ALPS Living Costs > More details	BMI £53.51 Standard rate : £53.51	V D £	
Family income benefit x 1		Aviva Life Protection Solutions • Global Treatment available at £4 per month • Fracture Cover available at £4 per month > More details	BMI £77.46 Standard rate : £77.46	V D £	
28/05/2021		Aviva Life Protection Solutions Upgraded CI/No Child Upgrade • Global Treatment available at £4 per month • Fracture Cover available at £4 per month > More details	BMI £77.46 Standard rate : £77.46	V D £	
28/05/2021		Multi Discount (1 year) • For more info on Legal & General's Protection plans please see here: https://www.legalandgeneral.com/adviser/protection/	£45.63	V D £	
28/05/2021	Standard Quotes				

<https://www.webline.co.uk/WeblineUI/Quote/ReloadQuote/1b71bd37-550a-4370-8c89-ad3601015c49/7dccb89e9-fc1d-4740-babd-ad3601015c5b/96362949>

Use the **Reload** or **Quote** buttons as indicated to open up that piece of research.

Amy Wood

Click reload or quote to access this quote

Info **Apply**