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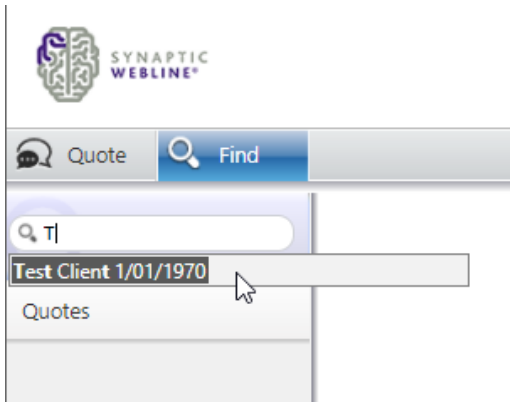
Last Modified on 28/05/2021 3:40 pm BST

All pieces of work are automatically saved when working through Webline. 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:
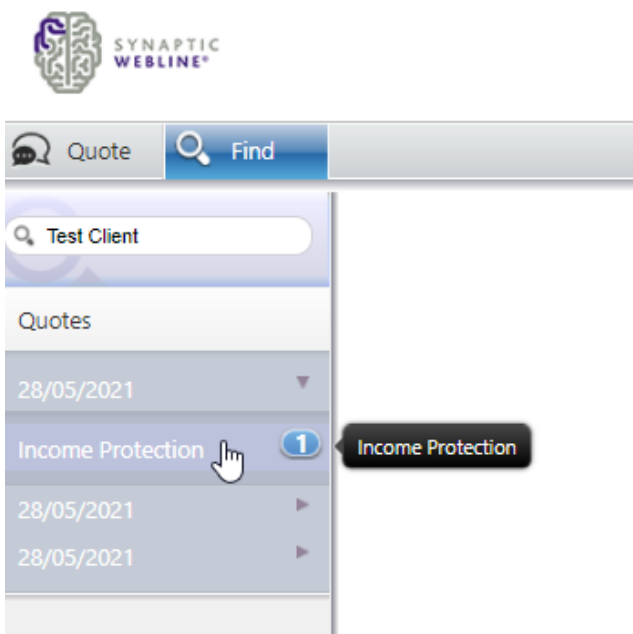
The following screen if relevant to a Multi Benefit quote:
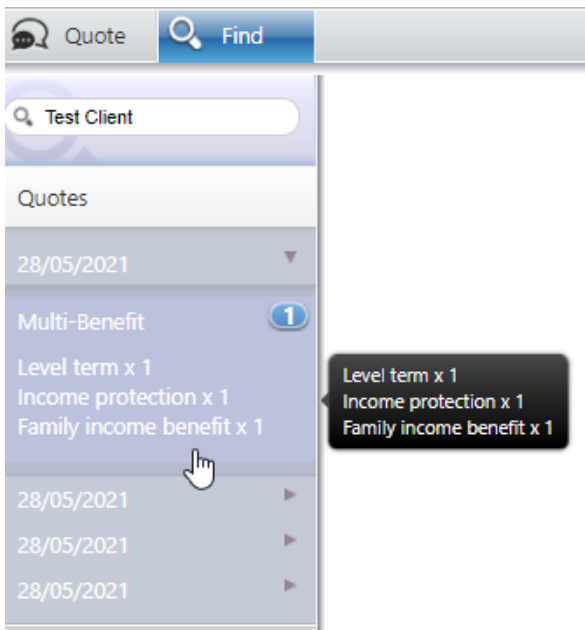
You can load the quote by clicking on the basic details of the quote. Webline will show this screen for the Standalone option:

And this screen for the Multi Benefit option:

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