

Creating Quotes - Annuities

Last Modified on 02/04/2020 9:52 am BST

There are two types of annuity quotes available on Weblines:

'Detailed quote' will create a more precise quote for the client, as it takes into consideration any medical history and the type of contract the pension fund is coming from and therefore requires more information to be recorded at this quote stage.

'Fixed Term' will create a quote based on a regular retirement income for a number of years

The screenshot shows the Synaptic Weblines user interface. At the top, there is a navigation bar with links for Quote, Track, Users, Settings, Admin, and Info. A banner for 'WEBLINE PLAY' is visible. The main content area is titled 'Create a new quote' and has two tabs: 'Protection' and 'Annuities'. Under the 'Annuities' tab, there are three options: 'Detailed', 'Find Saved Form', and 'Fixed Term'. The 'Detailed' option is highlighted with a red box. Below this, there are two search boxes: 'Find a previous quote' and 'Find a previous online application'. On the right side, there is a 'Need help?' section with contact information and a 'News' section with a service downtime notice for Sunday 17th November 2019.

SYNAPTIC WEBLINES

Attract new protection customers with
WEBLINE PLAY Find out more

Webline Admin
Amy A Wood
Fri 15 Nov 2019, 12:23

Quote | Track | Users | Settings | Admin | Info

Synaptic Website | Log off

Create a new quote

Protection | **Annuities**

- > Detailed
- > Find Saved Form
- > Fixed Term

Product glossary

Find a previous quote

Quote ref or surname

- > List my recent quotes
- > List all recent quotes

Show my last logins

Find a previous online application

Application ref

- > Advanced search
- > List my recent applications

Need help?

- Call us free on 0800 028 0033
- Email Synaptic support at support@synaptic.co.uk
- Visit our support site Synaptic Knowledgebase

News

LV= service downtime - Sunday 17th November 2019

This weekend (Sunday) we will be taking down a number of our services which will include our portal service and quote and apply application. During this time we aren't proposing to provide any messages to external users (on the website or portal messages) due to the low volume. The services will be put back online later Sunday and we will undertake post sale testing to ensure everything is back in production and working as expected ahead of Monday morning.

Copyright © Synaptic Software Limited