View Webline pricing in CIExpert

Within CIExpert, you will see a screen with a list of your assessments. **Select** the assessment you wish to work on

You will see the **Client details** imported from **Synaptic Webline**

CI EXPERT
CRITICAL ILLNESS KNOWLEDGE BASE

❯ **Client Details**   ❯ Policy Select   ❯ Policy Compare   ❯ Preferential Conditions   ❯ Assessment Summary   Help   Logout

Enter your client's details below

New Assessment

Let's get started, this won't take long
Step 1: Client Details

How would you like to handle quotes for this assessment?

| Manual ♥ | Iress ♡ |
| SolutionBuilder ♡ | Synaptic ♡ |

ℹ Imported Quotes   NEW FEATURE

This new feature allows you to display the prices from a your pricing portal in our policy rankings, making the comparison of quality vs cost both quicker and easier. For more information about these features, please see our video guides.

Video Guides:

SolutionBuilder   Iress

Would you like to do a live assessment with a real client or use your training credits?

| Live | Training |

You have 299 credits available.

What is the client's first name?

Test

What is the client's last name?

Tester

What is their gender?

| Male | Female |

Enter their Date of Birth:

29/12/1983   Age   39

Are they a smoker or non-smoker?

| Non-smoker | Smoker |

Complete details for **Children's cover** and click **Continue to Step 2**

Children's Cover

Do they have any children between 0-22 years old?
(that require cover)

| No | Yes |

This field is required.

Sum Assured

Enter the Sum Assured:

£ 150,000
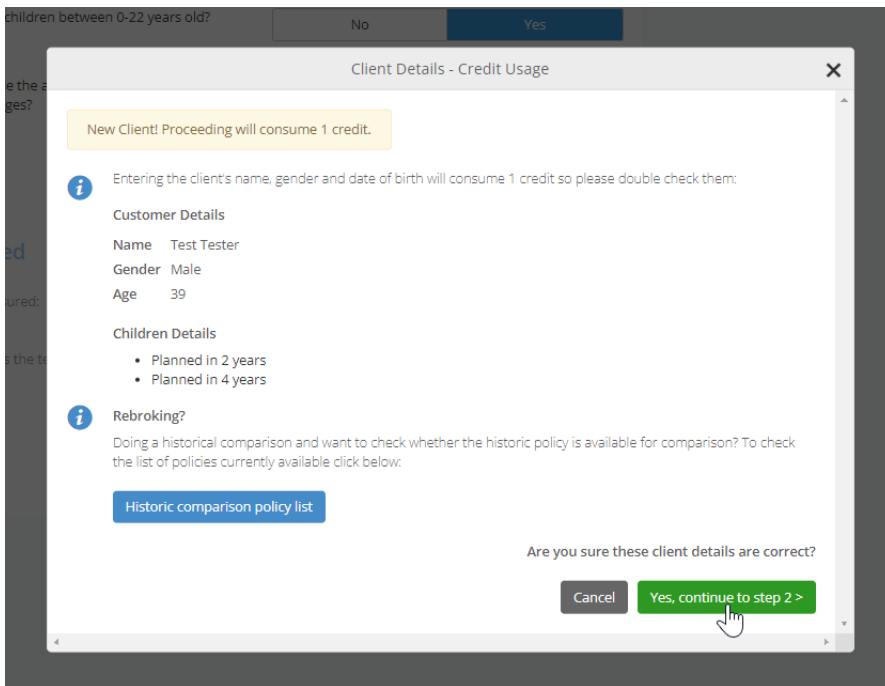
How many years is the term?

20

Type of Cover

| Decreasing | Level | FIB |

Continue to Step 2 >

If it's a new client, you will see a message in CIExpert to confirm this will use one of your credits, click to **continue**

Quotes imported from Synaptic Webline are indicated by **'SY'**, a **'V'** indicates a variation to the quote requested. If you hover over the icons, helptext will appear to explain more detail. If no price is displayed, it will usually be due to the provider not supporting the scenario requested.

Please refer back to **Webline** for more detail around the pricing and where the provider has been excluded or declined to quote.

Link to next article