SYNAPTIC WEBLINE

USER GUIDE

SYNAPTIC
WEBLINE

June 2016

Contents

1. Getting Started 3
1.1. Registration 3
1.1. Software Required 4
2. How To Edit Your Account Details – Vendor Administrator Access 4
2.1 User Options – Vendor Administrator Access 4
2.1.1 View Your Details 5
2.1.2 Edit Your Details 5
2.1.3 Change Password 6
2.1.4 View All Users 6
2.1.5 Add New User 7
3. Settings 7
3.1 Account Details 8
3.2 Edit Your Account 8
3.2.1 Change Company Name / Contact Details 9
3.2.2 Change Regulatory Details 9
3.2.3 Change Registered Address 9
3.2.3 Set or Edit a Business Reply Address 9
3.2.4 Alter Optional Inputs Displayed on Website Quote Forms .... **Error! Bookmark not defined.**
3.2.4 Set Email Notification for B2C Quotes 9
3.3 Account Options 9
3.4 Agency Codes 10
3.5 Commission Settings 11
3.6 Compliance Text 12
3.8 Product and Provider Panels 13
4. Info 14
5. Documents 14

1. Getting Started

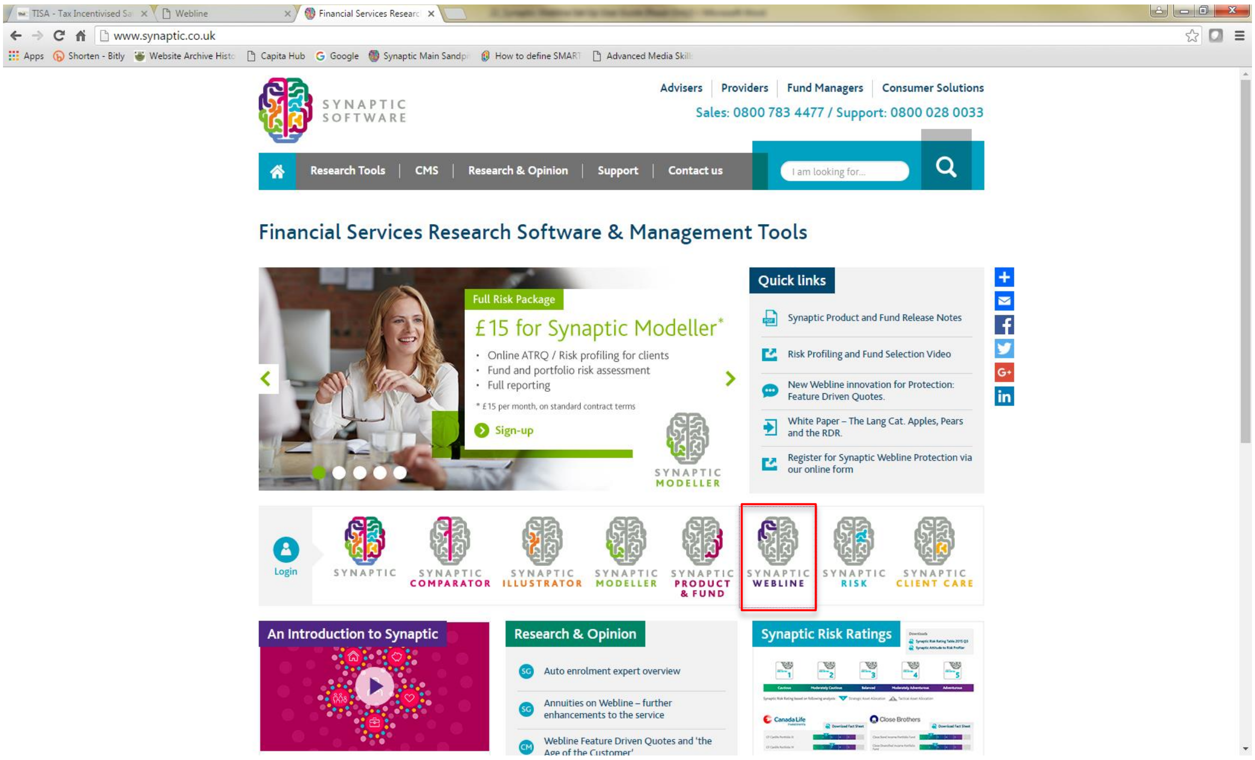
1.1. Registration

You will need to register online at www.synaptic.co.uk and we will send you the following logon details:

- Webline number
- User name
- Password

We suggest you make a note of these details and keep them in a safe place.

The Webline logon page can be accessed from www.synaptic.co.uk and selecting the Webline brain from the **Login strip** in the centre of the page.



Please note that your initial registration provides you with an administrative user logon, and can be used to customise the account to your requirements. Administrators are the only users able to create additional user logons for any other staff in your office. This is a multi-user environment and as such, there is no charge for creating & maintaining additional users within your account.

Now that you have opened your Webline account, there is some initial activity needed to help you get the most out the system and ensure you can quickly and easily obtain accurate quotes and apply electronically.

1.1. Software Required

All you require is a PC with internet access and Adobe Acrobat© Reader. There is no additional software to download or maintain. Please note, Webline has been developed using Internet Explorer and currently has not been tested with any other browser.

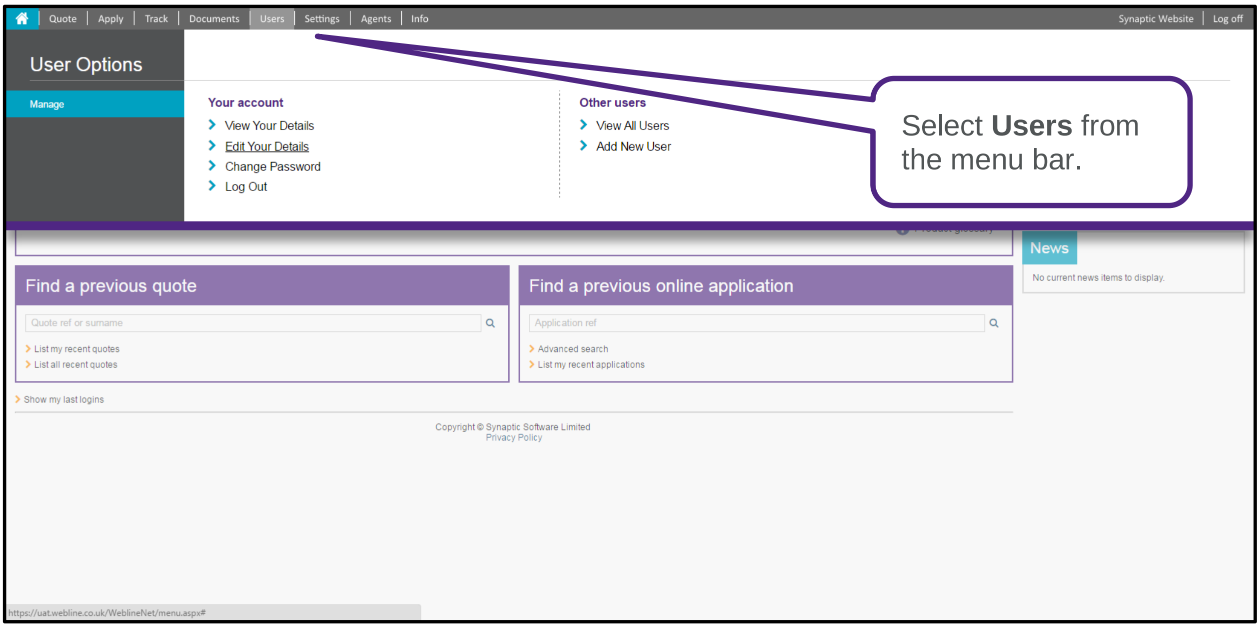
2. How To Edit Your Account Details – Vendor Administrator Access

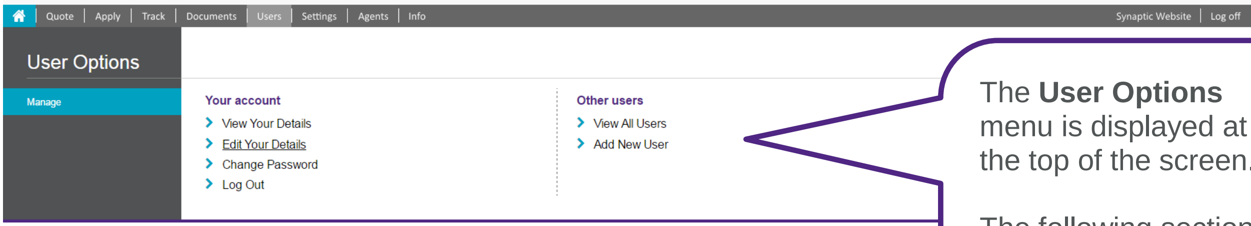
The initial registration provides a single user for your firm – this is your administrator account. An administrator may use the system like any other user, but they have additional privileges including the ability to create new users. So in a firm with several users, each should have their own identity set up on the system – there is no extra charge for this. The administrator should immediately 'disable' a user if, for example, they leave the firm.

When you initially log into Webline, the main menu bar will be available at the top of the screen. Once you move away from the homepage and access the different areas, the menu bar will display additional drop down menus giving you options based on the area you are in. The main menu will always be available from the top menu bar. This user guide will go through each of the areas in the menu bar.

NB: The firm is solely responsible for the administration and safe keeping of all user names and passwords.

2.1 User Options – Vendor Administrator Access



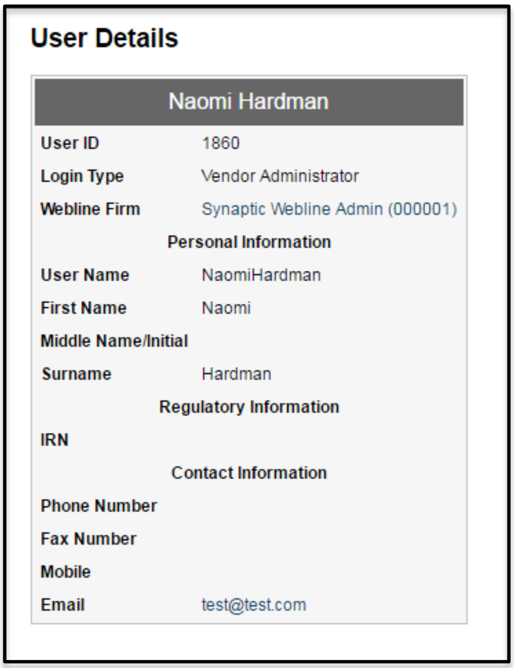


The **User Options** menu is displayed at the top of the screen.

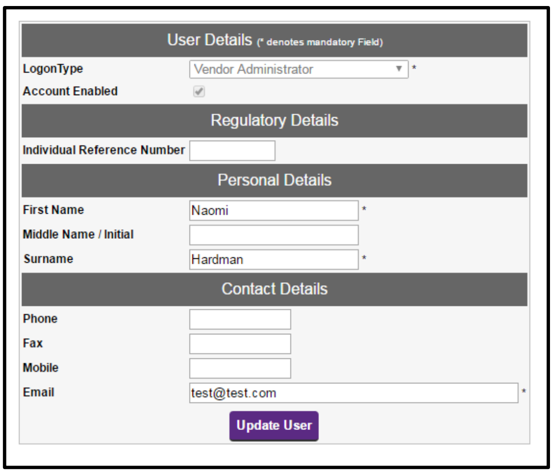
The following sections will go through each of these areas in turn.

2.1.1 View Your Details

This displays a summary of your user details.



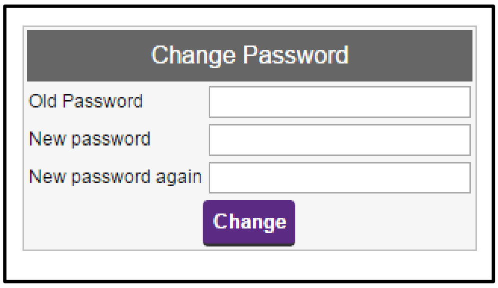
2.1.2 Edit Your Details



User details can be updated. Select **Edit User** to amend and **Update User** to save the changes.

2.1.3 Change Password

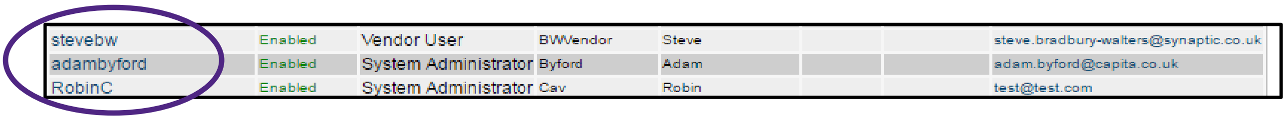
A simple form allows you to enter your old password (for security reasons) and then the new password twice (to ensure it has been entered correctly), before selecting the '**Change**' button.



NB: If you are also using Synaptic Research or Client Care Desktop, you will need to update any Webline password changes within your Synaptic account details. If you use Synaptic Fusion technology platform, all your user details can be stored in one convenient location for access to all Synaptic products.

2.1.4 View All Users

Clicking the "**View All Users**" link shows a table of all users registered for that firm (including any that may have been set as disabled for any reason).



stevebw	Enabled	Vendor User	BWVendor	Steve			steve.bradbury-walters@synaptic.co.uk
adambyford	Enabled	System Administrator	Byford	Adam			adam.byford@capita.co.uk
RobinC	Enabled	System Administrator	Cav	Robin			test@test.com

The first column shows the user name – the administrator may click this and be taken to a new screen with four tabs. The vendor administrator can reset all users' passwords and change their details.

The next screen defaults to **Details**, which gives a basic summary of the user's details.

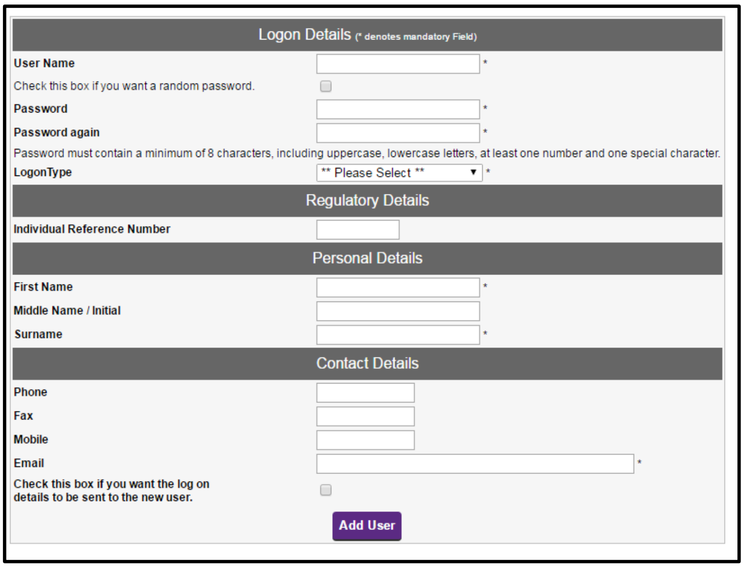
Edit allows you to disable the user account by un-ticking the 'account enabled' box (or re-enable a user by ticking this option). You can also promote or demote the user's status between vendor administrator and vendor user and update contact details.

The third tab **Logon History** shows a list of the recent logons applicable to the user.

The final tab **Reset Password**, allows you to reset the user password or generate a random password, and select to email this directly to the user.

2.1.5 Add New User

By selecting this option, you can add new user accounts for Webline for your firm. Enter the new user details, selecting the relevant **Logon Type**:



'Vendor Administrator' – will allow the user to access all the settings area and customise Webline. This logon also includes the vendor user standard functionality.

'Vendor User' – will allow the user to use Webline to obtain quotes and apply electronically.

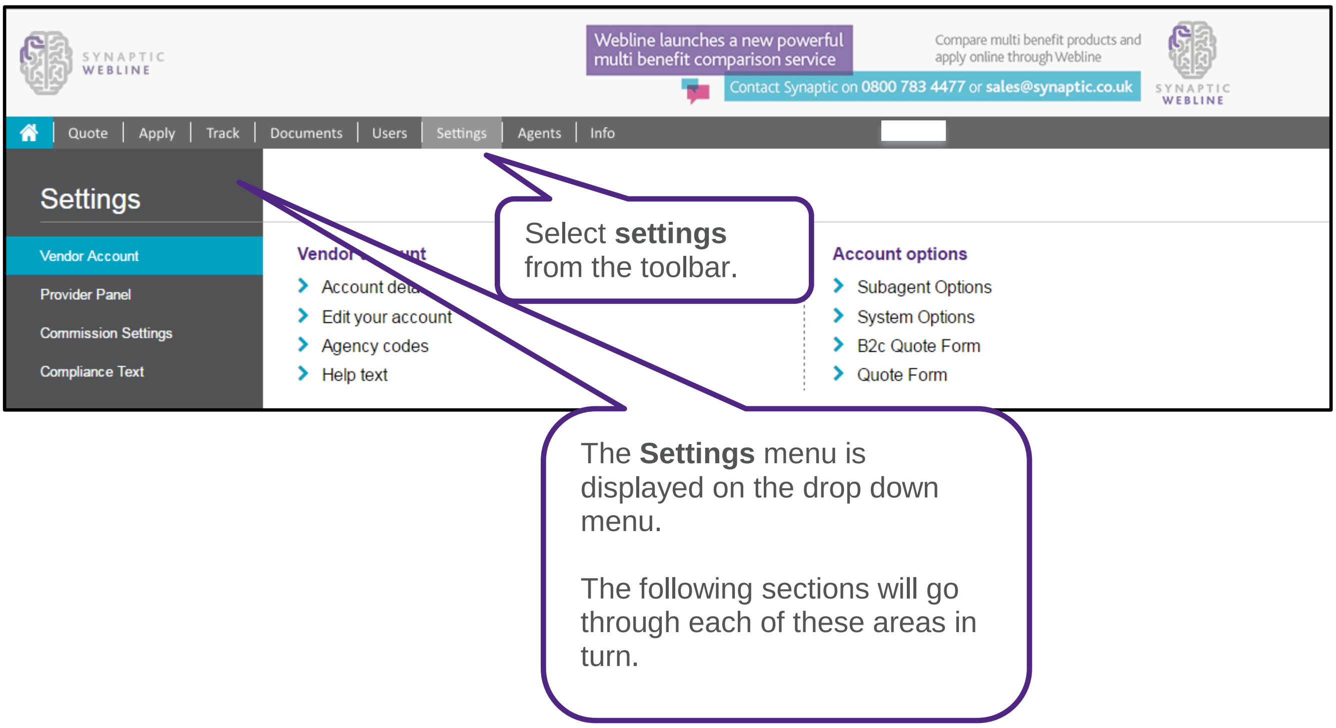
'Vendor Read Only' – is a read only account.

Check the box at the bottom of the screen to automatically e-mail these new details to the user.

Select **Add User** to save the details.

3. Settings

After we confirm your registration, you may immediately log on to the service using your administrator user name, and set up your company details using the "**Settings**" facility in Webline. In this section, you can set panels of products for the quotes, as well as set the commission levels (by provider and product) if you wish to sacrifice commission.



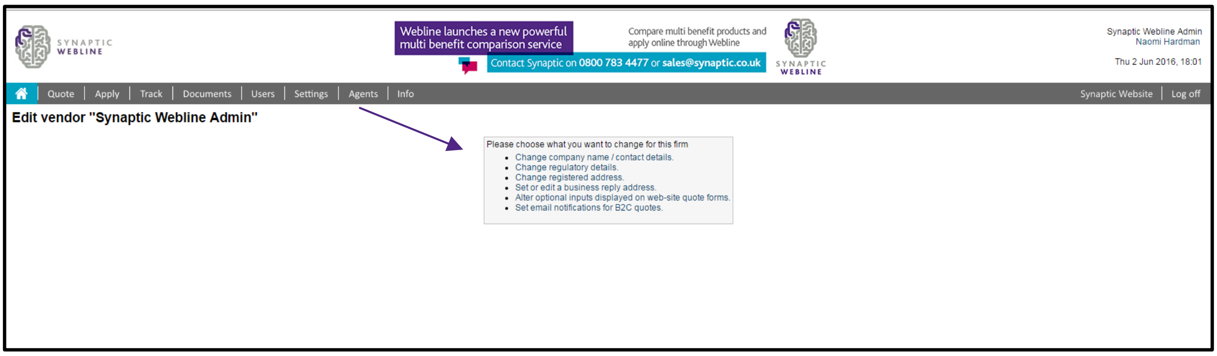
3.1 Account Details

Use this screen to view a summary of your account details including contact name, email and company address.

Parameters	
Vendor ID	000001
This vendor is ENABLED	
This is a test vendor	
Registration time	10/02/2011 15:18:34
This vendor is not listed in our directory	
Introducer ID	10
This vendor has subscribed to the subagent system	
Details	
Trading Name	Synaptic Webline Admin
Company Name	Synaptic Webline Admin
Contact Name	Jonathan Clutton
Master Email	test@altoromutual.com
Phone	555-555-5558
Fax	9876543210
Terms of business / Initial Disclosure Document URL	http://www.webline.co.uk/help/TOBDemo.pdf
Registered Address	Jonathan Clutton Synaptic Webline Admin 753 Main Street 753 Main Street 753 Main Street 753 Main Street PO15 7AA
Business Reply Address Enabled	
BR Address	753 Main Street 1234 753 Main Street 753 Main Street 753 Main Street 753 Main Street 1234
Regulatory Numbers	
Regulatory Status	Regulated
FCA Number / FRN	799100
Principal FRN	799100
Email Notifications	
Quote Notifications	ENABLED
Illustration Notifications	ENABLED
Prop Download	ENABLED
Prop Requests	ENABLED

3.2 Edit Your Account

There are six links within **Edit Your Account**, as shown below. Once you have entered any changes, click 'Update' at the bottom of the page and you will see a confirmation note. Click your browser's 'back' button and then navigate through the menu again to see your changes.



NB: If the changes do not appear, your browser may have 'cached' the old page – using the browser 'refresh' button should display the revised page in this case.

3.2.1 Change Company Name / Contact Details

The details here are attached to any application that is downloaded from your consumer-facing website so it is important that these are correct. *Note, that you may include a company trading name (useful if you have a website which you operate under a separate name). The trading name will appear on the Webline quote pages, if you elect to use Webline on your website.*

3.2.2 Change Regulatory Details

The only details you are unable to change are your regulatory status and FRN number. If you wish to amend these details, please complete the fields on this page and press the **send request** button. This will email the change request to Webline and we will inform you when the details have been updated.

3.2.3 Change Registered Address

This address should match the address registered with the providers in your agency agreements. It is very important that this is correct, particularly your post code.

3.2.3 Set or Edit a Business Reply Address

If you would like any applications downloaded from your website, to be sent to a different address to your registered address, you may enable and enter a business reply address on this page.

3.2.4 Set Email Notification for B2C Quotes

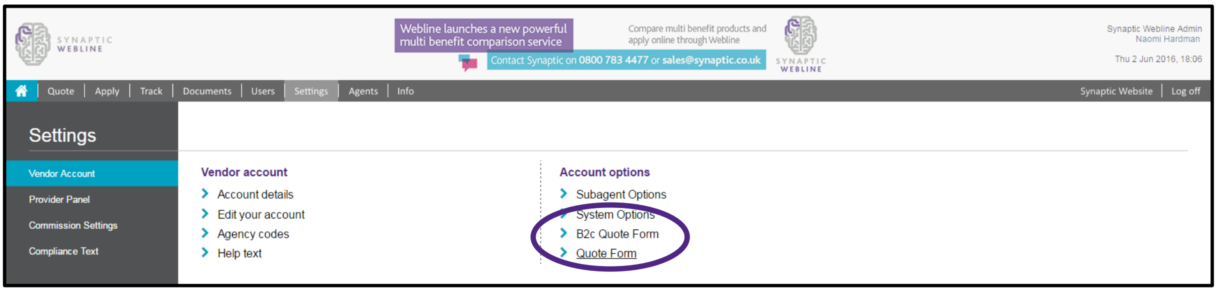
This area allows you to choose which events (if any) will send an automatic e-mail notification to the e-mail address specified in your account details. This can be every time a quote is requested, when an illustration or proposal is downloaded, or when a proposal request for a ‘paper pack’ is requested through Webline.

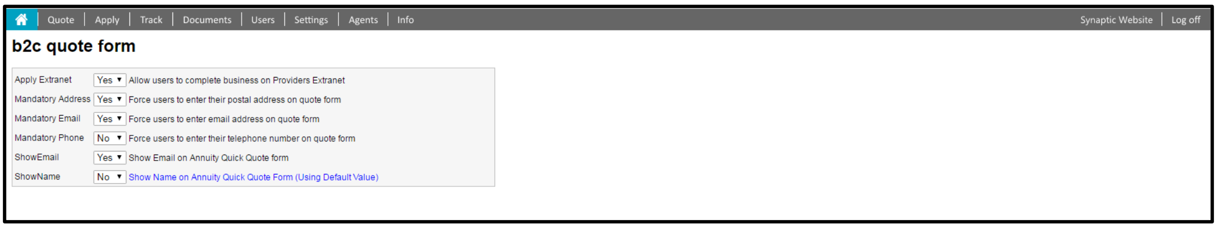
NB: These options are also available through the Account Options menu. Any changes made in either section will automatically be updated to the other, this will ensure that account integrity is maintained.

3.3 Account Options

If you have set up the Webline quotes on your consumer facing website, the quote form preferences can be set within the **B2C Quote Form** area.

Preference can also be set for the quote form you use when you are logged into Webline, to do this, select **Quote Form** from the menu.

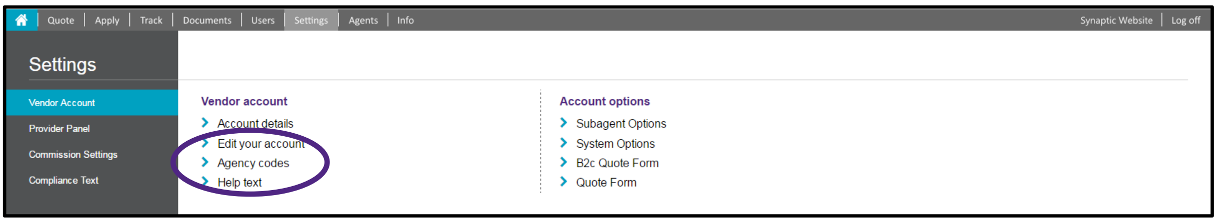


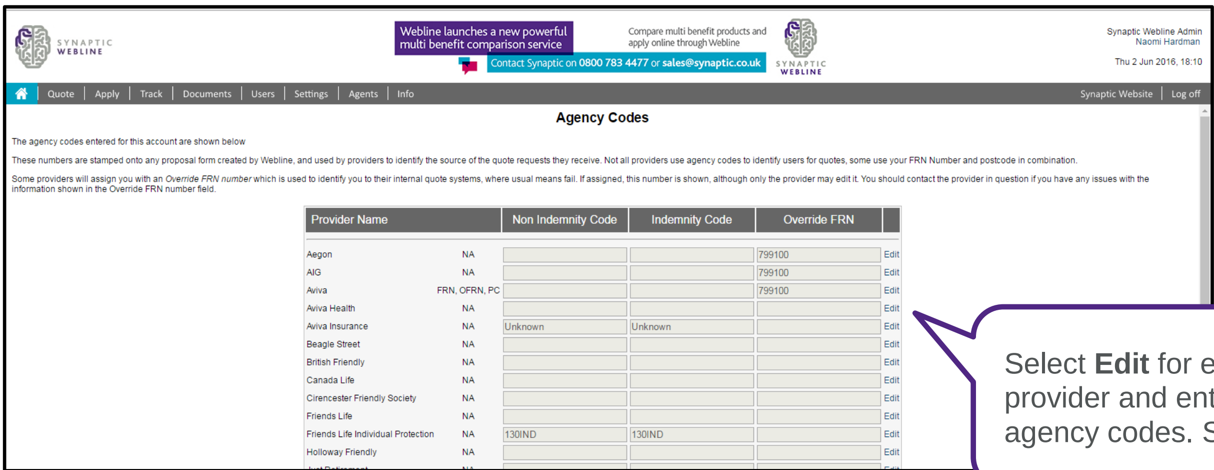


3.4 Agency Codes

For certain providers, you must enter your agency codes to receive quotes. It is good practice however to enter all of them when setting up Webline.

Selecting **Agency Codes** will display a table listing all the providers.

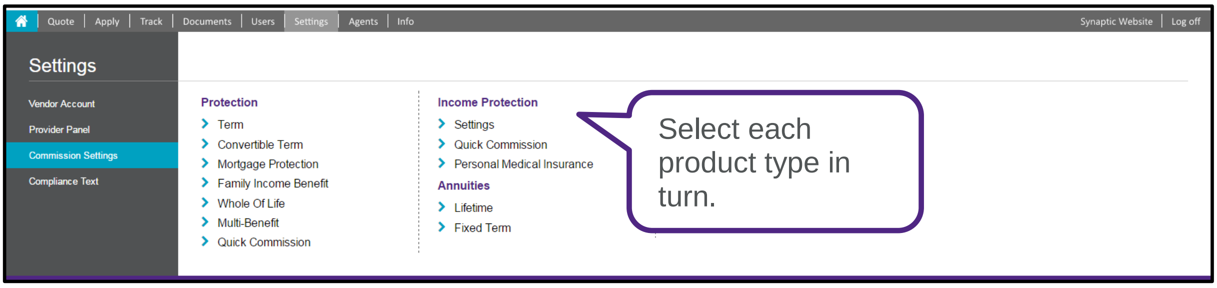




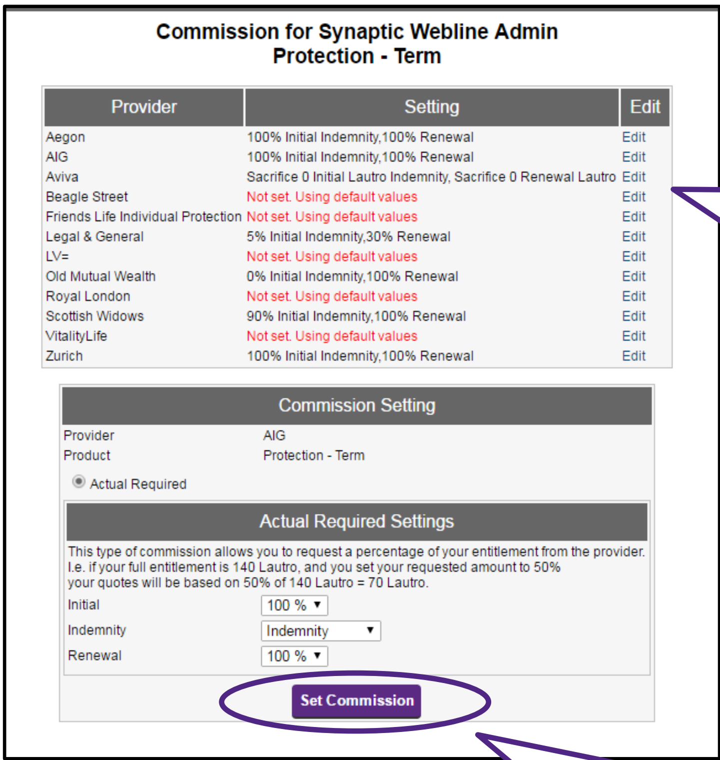
Select **Edit** for each provider and enter the agency codes. Select **Save**.

3.5 Commission Settings

Within **Commission Settings**, select the product type which will display list of providers.



Select each product type in turn.



Commission for Synaptic Webline Admin
Protection - Term

Provider	Setting	Edit
Aegon	100% Initial Indemnity,100% Renewal	Edit
AIG	100% Initial Indemnity,100% Renewal	Edit
Aviva	Sacrifice 0 Initial Lautro Indemnity, Sacrifice 0 Renewal Lautro	Edit
Beagle Street	Not set. Using default values	Edit
Friends Life Individual Protection	Not set. Using default values	Edit
Legal & General	5% Initial Indemnity,30% Renewal	Edit
LV=	Not set. Using default values	Edit
Old Mutual Wealth	0% Initial Indemnity,100% Renewal	Edit
Royal London	Not set. Using default values	Edit
Scottish Widows	90% Initial Indemnity,100% Renewal	Edit
VitalityLife	Not set. Using default values	Edit
Zurich	100% Initial Indemnity,100% Renewal	Edit

Commission Setting

Provider	AIG
Product	Protection - Term

Actual Required

Actual Required Settings

This type of commission allows you to request a percentage of your entitlement from the provider.
I.e. if your full entitlement is 140 Lautro, and you set your requested amount to 50%
your quotes will be based on 50% of 140 Lautro = 70 Lautro.

Initial	100 %
Indemnity	Indemnity
Renewal	100 %

Set Commission

Select **Edit** to amend the commission for the relevant providers.

Webline gives you the facility to set the value of commission you would like from each product provider for the product type.

Each quote of that type will then be based on the commission style you have set for your company rather than the provider's default.

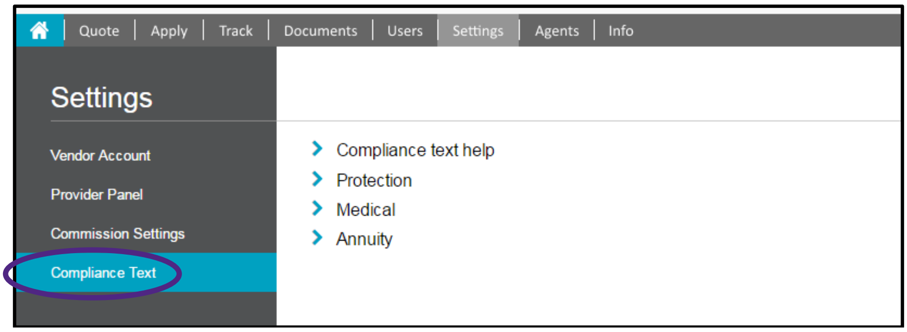
Edit the commission for the relevant provider and you will have the option to set the commission sacrifice requirements.

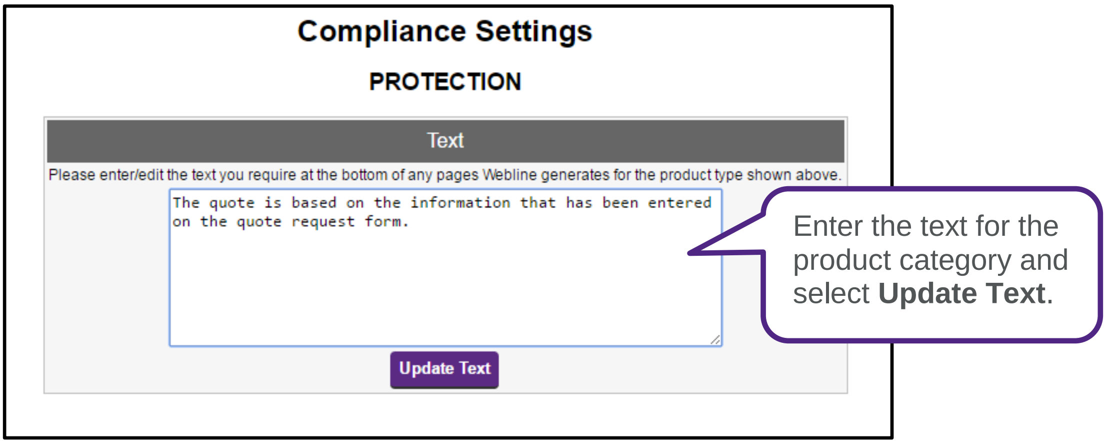
Please note these options will vary depending on the provider.

3.6 Compliance Text

This is used if you are displaying our quote service on a consumer facing website and will display your compliance text to the consumer when they are obtaining a quote.

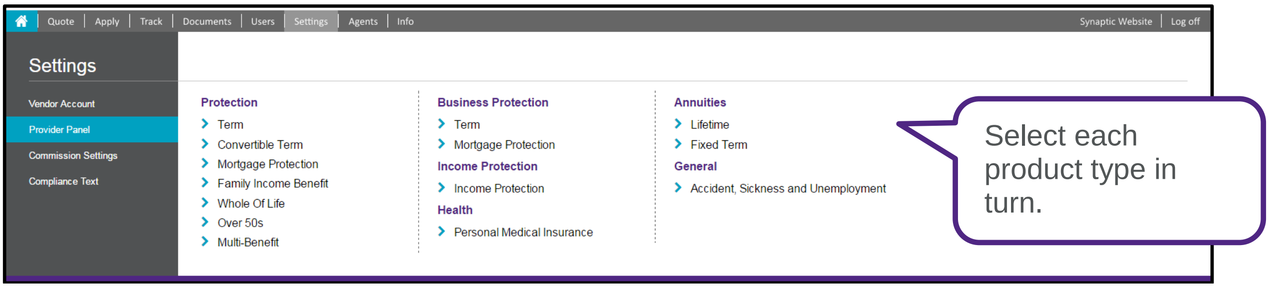
Select **Compliance Text** and the product category.

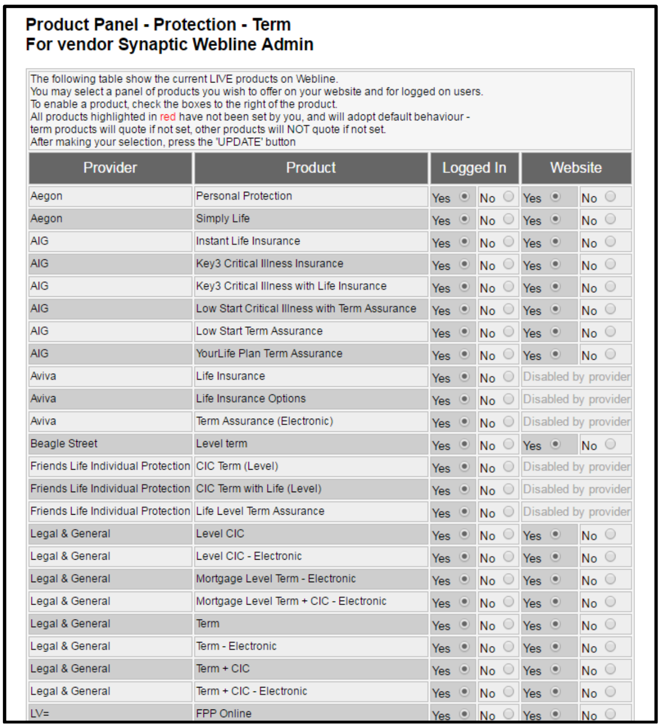




3.7 Product and Provider Panels

All relevant products are available on your account when you first register, unless disabled by the provider. Select **Provider Panel** and the particular product category which will bring up a list of providers and their individual products.





Product Panel - Protection - Term
For vendor Synaptic Webline Admin

The following table show the current LIVE products on Webline.
You may select a panel of products you wish to offer on your website and for logged on users.
To enable a product, check the boxes to the right of the product.
All products highlighted in red have not been set by you, and will adopt default behaviour -
term products will quote if not set, other products will NOT quote if not set.
After making your selection, press the 'UPDATE' button

Provider	Product	Logged In	Website
Aegon	Personal Protection	Yes No	Yes No
Aegon	Simply Life	Yes No	Yes No
AIG	Instant Life Insurance	Yes No	Yes No
AIG	Key3 Critical Illness Insurance	Yes No	Yes No
AIG	Key3 Critical Illness with Life Insurance	Yes No	Yes No
AIG	Low Start Critical Illness with Term Assurance	Yes No	Yes No
AIG	Low Start Term Assurance	Yes No	Yes No
AIG	YourLife Plan Term Assurance	Yes No	Yes No
Aviva	Life Insurance	Yes No	Disabled by provider
Aviva	Life Insurance Options	Yes No	Disabled by provider
Aviva	Term Assurance (Electronic)	Yes No	Disabled by provider
Beagle Street	Level term	Yes No	Yes No
Friends Life Individual Protection	CIC Term (Level)	Yes No	Disabled by provider
Friends Life Individual Protection	CIC Term with Life (Level)	Yes No	Disabled by provider
Friends Life Individual Protection	Life Level Term Assurance	Yes No	Disabled by provider
Legal & General	Level CIC	Yes No	Yes No
Legal & General	Level CIC - Electronic	Yes No	Yes No
Legal & General	Mortgage Level Term - Electronic	Yes No	Yes No
Legal & General	Mortgage Level Term + CIC - Electronic	Yes No	Yes No
Legal & General	Term	Yes No	Yes No
Legal & General	Term - Electronic	Yes No	Yes No
Legal & General	Term + CIC	Yes No	Yes No
Legal & General	Term + CIC - Electronic	Yes No	Yes No
LV=	FPP Online	Yes No	Yes No

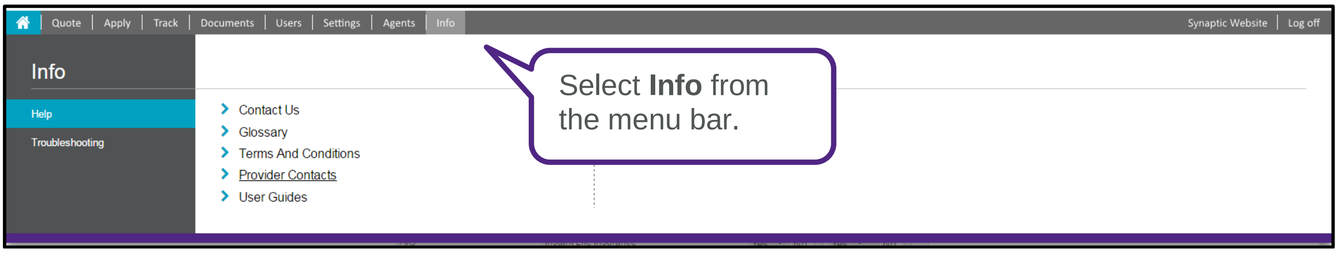
Initially the majority of providers will be checked as **yes** – select **no** to disable any, then click the **update** button at the bottom of the screen for the changes to take effect.

If you have setup the Webline quotes on your consumer facing website, use the website column to select the products you want available when consumers are doing quotes directly on your website.

If the products have been disabled by the provider, please liaise with the provider directly.

4. Info

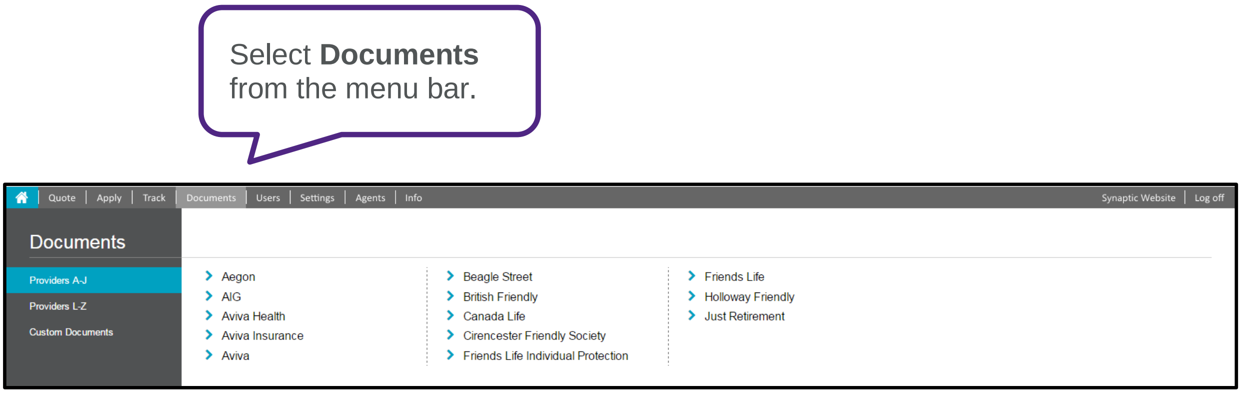
We provide some general support details under **Info**, for example user guides, contact details and glossary.



Select the relevant area from the toolbar.

5. Documents

This area gives you access to the document library where you can access product related documents for the majority of providers available on Webline. All documentation available in this area is supplied by the providers.



This opens up a selection panel of providers. Select the relevant provider from the menu bar and the documentation that has been supplied by the provider will be displayed.

Products & Services from Synaptic Software:

SYNAPTIC CLIENT CARE

SYNAPTIC COMPARATOR

SYNAPTIC MODELLER

SYNAPTIC PRODUCT & FUND

SYNAPTIC RISK

SYNAPTIC WEBLINE

SYNAPTIC WEB SERVICES

SYNAPTIC