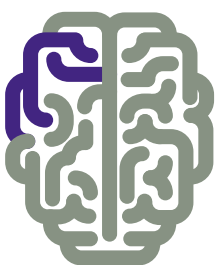


# SYNAPTIC WEBLINE

## USER GUIDE



SYNAPTIC  
WEBLINE

Version 1.1

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## 1 Introduction

This guide will show you how to obtain multiple protection quotes and apply electronically. The products that can be quoted and applied for, using this software are as follows:

Standalone Products:

- Level Term Assurance
- Decreasing Term Assurance
- Convertible Term Assurance
- Critical Illness Cover
- Family Income Benefit
- Income Protection
- Whole of Life
- Business Protection

Multi benefit quotations:

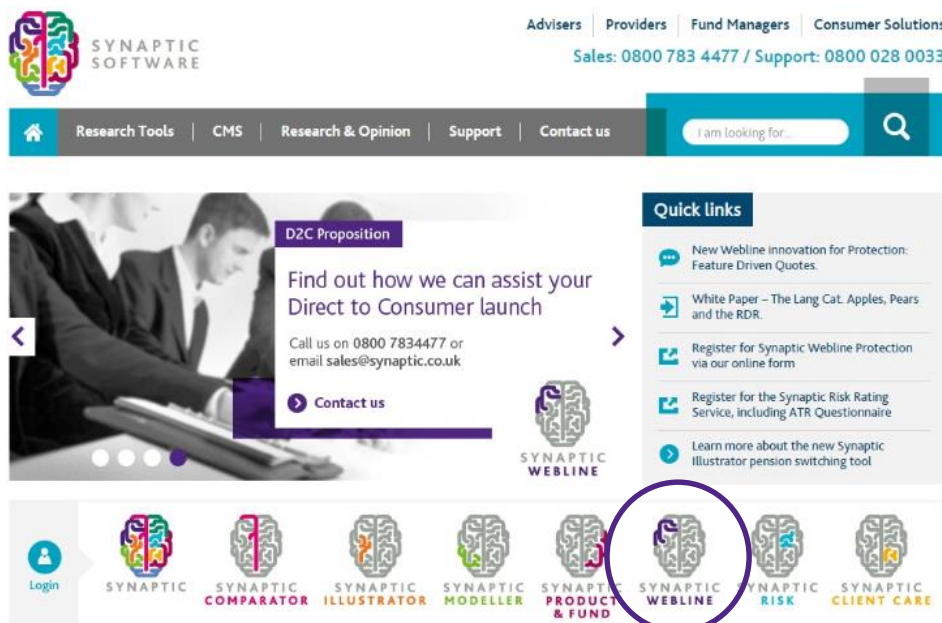
- Level Term Assurance
- Decreasing Term Assurance
- Income Protection
- Family Income Benefit
- Waiver of Premium

No saving is required when using Webline – auto save will be done at each stage of the process. Therefore if a quote has been obtained but the product hasn't been applied for, it can be found easily at a later date (see [section 8](#) of the guide).


## 2 Logging into Webline

Webline can be accessed via the Synaptic Software Limited website.

Go to the Synaptic website – [www.synaptic.co.uk](http://www.synaptic.co.uk) and scroll down the screen until you find the 'log in' option.



Click on Synaptic. This will take you to the Synaptic login page as shown next.



SYNAPTIC

**Welcome**

Please enter your security details. Unauthorised access could lead to prosecution.


---

User Name

Password

Sign In

[Forgotten your password?](#)



Unipass

forget passwords

[Click here to sign in with a Unipass certificate](#)

Once you have signed in, you can access Weblines from the Weblines tab.

ClientsModellerComparator**Weblines**Product & FundSettings


⚙ Weblines

**Synaptic Weblines**  
Weblines is an online, comparative life quotation system committed to providing innovative technology solutions to help intermediaries better manage their business.

**Weblines Annuities** →  
Click here to open Weblines Annuities in a new window and do a quotation for the current client.

**Weblines Protection** →  
Click here to open Weblines Protection in a new window and do a quotation for the current client.

**Quote History** →  
Click here to open Weblines in a new window and view the quote history for the current client.

**Account Details**   
Edit your account details for Weblines.

Click on **Weblines Protection** -> to start.

For any annuity quotes and setting up your agency codes and preferred panel if applicable, you will need to use **Weblines Annuities** tab, this will open another window in your browser and take you Weblines version 1, which you guide you should have received as part of your licence package.

www.synaptic.co.uk

The Webline home page will now appear as shown below:

webline

Quote

Find

Need help completing this screen?

Clients

Products

Results

Apply

Client A

New Client

Date of Birth

Occupation

Annual Earnings

Email Address

Gender

Male

Female

Smoker

No

Clear

Client B

New Client

Forename Surname

Date of Birth

Occupation

Annual Earnings

Email Address

Gender

Male

Female

Smoker

No

Clear

You have three attempts to put your password in correctly. If on the third attempt, the password is entered incorrectly, the system will be locked and you will be unable to attempt a further log in for 5 minutes.

If you have completely forgotten your password, speak to your administrator and they will be able to amend your password. If you use an administrator licence, you will need to call the Support Desk on 0800 028 0033 and request a password change. Once a new password is issued, you will need to wait to until the end of the 30 minute lock out period before trying to log in again.

www.synaptic.co.uk

### 3 Client Details Standalone Products - Requesting Quotes

Complete the client details. The name field will do an automatic search as you start typing the name and if you have previously entered the client details, any matches will be found and drop down list under the name field will display the found details.

NB: Note that as well as client name, their date of birth and smoker status is also shown, helping you to ensure that you are looking at the right client. Either select an existing client or finish typing the client's forename and surname in full and tab or click to the next field.

If typing new client details, the occupation will need to be selected from the Weblines list. Once again, start typing the client's occupation and a drop down list will be displayed with matches. If you cannot find a suitable match, select **unknown occupation** and the quote will be based on a non-hazardous occupation.

**Annual earnings** is an optional field unless dealing with Income Protection. Please enter a number greater than 0. The **Gender** status can be selected by simply clicking on the relevant button and then the chosen option will be highlighted. The **Smoker** status is changed by clicking the grey box to the left of "No".

The **E-mail address** is an optional field.

Complete "Client A" details and then record the partner as "Client B" as required. Once completed, use the **next** button (the right facing arrow) or select **Products** in the left hand menu to proceed to the next screen.

NB: When logging into Weblines Protection via Synaptic, client details already added to Synaptic will be pulled through to Weblines. Client details can be searched within Synaptic and once located, you can proceed to Weblines Protection and client details are pulled through without having to rekey.

## 4 Requesting Quotes

The Product Selection screen will now display. You can either select to quote standalone products or Multi Benefit Products. Each journey will be described in this guide.

### 4.1 Common Buttons

There are a number of buttons on the various quote screens which work in the same way on the different product types:

The screenshot shows the Product Selection screen with the following fields and buttons:

- Quote for:** Client A (selected), Client B, Both
- Include Critical Illness Cover?** Yes (selected), (no options selected), Choose...
- Critical Illness Death Benefit is:** Accelerated (selected), Additional
- Driven By:** Benefit (selected), Premium
- Premium Frequency:** Monthly (selected), Annually
- Death Benefit Amount (£):** [Input field]
- Critical Illness Benefit Amount (£):** [Input field]
- Term Length:** [Input field] years
- Renewal Policy Required?** No (selected)
- Using Benefit?** No (selected)
- Waiver of Premium for Client A?** No (selected), Client B? [Input field]
- Include Critical Illness Rates?** Yes (selected)
- Include Premium Rates?** Yes (selected)

**Callout 1 (Top Right):** If you are producing quotes for each client of a couple and also a joint quote, use the **Quote for** buttons at the top of the page to select who you are producing the quote for.

**Callout 2 (Middle Right):** By selecting **Premium** from this page, the **Death Benefit Amount (£)** will change to **Premium Amount (£)**.

**Callout 3 (Bottom Left):** When adding **Term Length** either type in the required term or use the up and down arrows. This will increase or decrease the term by one year per click. To increase/decrease the number of years in larger increments, hold the **Control** key down whilst clicking the arrows.

**Buttons:** Quick Commission, Previous, Next

Critical Illness cover is set to "No" by default - click the small grey box to change this to "Yes" if Critical Illness cover is to be included as shown here:

Include Critical Illness Cover?	Yes	(no options selected)	Choose...
---------------------------------	-----	-----------------------	-----------

Clicking the **Choose...** button allows you to select up to three CIC options from a selection menu:

Critical Illness Options

Select up to 3 options

CIC Only

Yes

CIC & TPD (Any Occupation)

No

CIC & TPD (Own Occupation)

No

CIC & TPD (Suited Occupation)

No

TPD Only (Any Occupation)

No

TPD Only (Own Occupation)

No

TPD Only (Suited Occupation)

No

Comprehensive

Yes

Close

Up to three options can be selected. Once finished, select **Close**.

Change the required options to “**Yes**”. Click the “**Close**” button to save the options, and close this box. The chosen options will then appear as shown below (**CIC Only** and **Comprehensive** have been selected in this example):

Include Critical Illness Cover?

Yes

CIC Only, Comprehensive

Choose...

You may make further changes to these options by clicking “**Choose...**” again.

Once all the fields on this page have been entered, use the **next** button at the bottom of the page or click on **Results** on the left hand menu.

On each Product page, there will be a **Quick Commission** button (in the bottom right corner). This enables you to amend the percentage of commission that you want to include on the quotes. This can be used to sacrifice commission. Firstly, choose the **Initial Type** of commission that you will receive:



The following pages will show where the input screen for the product is different to the one shown above.

Select **Standalone Products**, for Multi Benefit Products refer to section 4

If you require a quote for each of the products listed, simply tick **All Products**. This will create one quote for each product type.

If more are needed, simply hover over the product and the counter will be displayed which will allow you to increase the number (maximum = nine). You may need to use this number in the following situation:

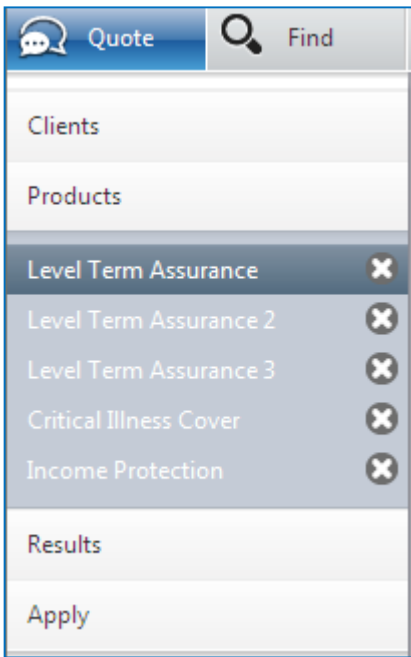
Mr A and Mrs A require life cover and critical illness cover. As an adviser you want to check the following scenarios:

- 1) Life cover for Mr A (no CIC)
- 2) Life cover for Mrs A (no CIC)
- 3) Life cover joint (no CIC)
- 4) Life cover and CIC – comprehensive and TPD own occupation for Mr A
- 5) Life cover and CIC – comprehensive and TPD own occupation for Mrs A
- 6) Life cover and CIC joint – comprehensive and TPD own occupation
- 7) Life cover and CIC for Mr A – TPD any occupation and TPD suited occupation
- 8) Life cover and CIC for Mrs A – TPD any occupation and TPD suited occupation
- 9) Life cover and CIC joint – TPD any occupation and TPD suited occupation

Therefore the counter for life cover will need to show nine. Select the **next** button to move to the quote details input screens.

4.2.1 Product Details

A separate screen is available for each type of product selected. If you have requested more than one quote for a product they will be numbered on the left hand side of the screen.



The cross next to each of the products, gives the ability to remove that particular product from this list.

4.2.2 Decreasing Term Assurance

In this screen, a **Decreasing Term** quote has been selected, which will be denoted by a blue highlight on the left side. For this quote a **mortgage interest rate** must be entered – note that this figure must be a whole number (decimals are not allowed).

Quote for

Client A

Client B

Both

Include Critical Illness Cover?

☐ No

Critical Illness Death Benefit is

Accelerated

Additional

Driven By

Benefit

Premium

Premium Frequency

Monthly

Annually

Death Benefit Amount (£)

Critical Illness Benefit Amount (£)

Term Length

▲▼

years

Mortgage Interest Rate %

▲▼

Waiver of Premium for Client A?

☐ No

Client B?

☐ No

Include Guaranteed Rates?

Yes

☐

Include Reviewable Rates?

Yes

☐

Enter the **Mortgage Interest Rate %**.  
Only whole numbers can be entered.

4.2.3 Family Income Benefit

The next example shows a **Family Income Benefit** quote – in this case, you must enter the **annual death benefit** amount that’s being requested (whole number of pounds). If the quote is to include CIC, enter as shown previously in this you guide.

Quote for

Client A

Client B

Both

Include Critical Illness Cover?

☐ No

Critical Illness Death Benefit is

Accelerated

Additional

Driven By

Benefit

Premium

Premium Frequency

Monthly

Annually

Annual Death Benefit Amount (£)

Critical Illness Benefit Amount (£)

Term Length

▲▼

years

Increasing Benefit?

☐ No

Waiver of Premium for Client A?

☐ No

Client B?

☐ No

Include Guaranteed Rates?

Yes

☐

Include Reviewable Rates?

Yes

☐

Record the **Annual Death Benefit Amount (£)**.

4.2.4 Income Protection

For Income Protection, you must either select the age at which the cover ceases, or specify a term of cover, by clicking either the **Cease** or the **Term** buttons. In the example below, **Cease** had been chosen so you must indicate the age of the client when the benefit is due to cease (**Cease Age**). The required **Monthly Benefit Amount** the client wishes to receive can be entered, in whole number of pounds.

However, if this field is left empty, each provider will return a quote showing the maximum benefit based on the clients annual earnings.

Various **Deferment Period** options are available – you may select one or more of these by clicking the appropriate one(s) to make you highlighted up to a maximum of three. Any more than this number and an error will be displayed. This will give comparison quotes for the deferred periods selected. (Note that not all providers cater for all of the deferment options).

Quote for

Client A

Client B

Driven by Age (Cease) or Term

Cease

Term

Cease Age

60

Premium Frequency

Monthly

Annually

Monthly Benefit Amount (£)

Leave Blank for Maximum Benefit Based on Earnings

Deferment Period(s) Required

4

8

13

26

52

56

104

112

weeks

Increasing Benefit?

No

Include Guaranteed Rates?

Yes

Include Reviewable Rates?

Yes

Select Cease Age, Monthly Benefit Amount (£) and Deferment Period(s) Required.

If the annual earning have not been recorded for a client, once the **Next** button is selected on the Income Protection input page, a message will appear:

Annual Earnings for Client A

Income protection requires a value for annual earnings.  
Please enter annual earnings for Sam Carter:

£

OK

Cancel

Record the client's annual earnings and click OK.

4.2.5 Whole of Life

The Whole of Life quote screen example below, you have chosen to quote based on the Benefit to be received – so **Benefit** is highlighted. This then allows you to select from one of four different **Benefit Types** – **Standard** has been chosen here. The **Benefit Amount (£)** and **Growth Rate** percentage must also be given. The **Target Fund Value (£)** is chosen if the **Target** is selected as the Benefit Type. There is also the option, as displayed, for joint life cover to choose whether **First Life** or **Last Survivor** cover is required.

Quote for

Client A

Client B

Both

Cover Basis

First Life

Last Survivor

Include Guaranteed Rate Quotes?

Yes

Include Investment Based Quotes?

Yes

Driven By

Benefit

Premium

Benefit Type

Minimum

Standard

Target

Normal

Benefit Amount (£)

Target Fund Value (£)

Term Length

▲▼

years

Growth Rate (%)

▲▼

Premium Frequency

Monthly

Annually

Increasing Benefit?

No

Waiver of Premium for Client A?

No

Client B?

No

Record the **Benefit Type** and the **Growth Rate (%)** to be used in the quote.

NB: Please note that Convertible Term Assurance, Whole of Life and Business Protection cannot be quoted as Multi Benefit and if any of these have been chosen, they will be displayed as individual quotes.

### 4.3 Multi Benefit Products

The Multi benefit quotation steps follow the same journey as the Standalone Products with few changes to the navigation.

Start the Multi Benefit quote after filling in the client details by selecting the **Multi Benefit Products** tab.

The screenshot shows the 'Product Selection' screen in the Synaptic Webline interface. A callout box points to the 'Multi Benefit Products' tab, which is selected under the 'Quote for:' section. The interface includes a sidebar with navigation links: Clients, Products (selected), Results, and Apply. A top bar contains a 'Quote' button, a search icon, and a user profile 'Sara Grimshaw'. Below the 'Quote for:' tabs, there is an information box explaining that users can select multiple benefits and adjust the number of quotes required using up/down arrows. The main area lists five benefit types, each with a counter set to 0 and a selection box:

Benefit Type	Count	Select
Level term assurance	0	<input type="checkbox"/>
Decreasing term assurance	0	<input type="checkbox"/>
Income protection	0	<input type="checkbox"/>
Family income benefit	0	<input type="checkbox"/>
Waiver of Premium	0	<input type="checkbox"/>

At the bottom right, there is an 'All Products' checkbox and navigation arrows.

Select the different benefit types you would like the quotation on by clicking into the box at the far right of the line to select the product. When a product type is selected a counter will be displayed allowing you to enter the number of quotes required for each product type. For example, you may wish to do two single life quotes for the client and partner and a joint quote. Therefore, you would need to use the counter to change the number to three separate requests. Each benefit count has a range from 0 to 4.

Please note that you can only select a maximum of 4 benefits in any combinations and Waiver of Premium is not counted as benefit. For example you can choose 2 level terms and 2 decreasing terms and Waiver of Premium or just 2 level terms and 2 decreasing terms or 1 of each benefit and Waiver of Premium.

The benefits available for selection for a Multi Benefit are:

- Level Term Assurance
- Decreasing Term Assurance
- Income Protection
- Family Income Benefit
- Waiver of Premium

If you require a quote for each of the benefit types listed, simply tick **All Benefits**. Select **next** button to move the quote details input screens.

4.3.1 Product Details

A separate screen is available for each of the benefit type selected.

Quote

Find

Clients

Products

Level Term Assurance

Decreasing Term Assurance

Income Protection

Family Income Benefit

Waiver Of Premium

Results

Apply

Each part of the Multi Benefit quote has its own form and the quote will only be requested when all of the parts have been filled in. It is possible to fill in the forms in any order, the last benefit type will request any blank fields to be filled in before moving onto the **Results** stage.

Please note that it is not possible to 'delete' benefits from the quote at this stage. To do this, select the **Quote** button at the top left hand side of the screen. This will take you back to the initial product selection screen where the benefits can be selected again.

Throughout filling the forms for any of the benefit types, you is able to set Quick Commission Settings by clicking the **Quick Commission** button.

These settings apply to the whole product and not just the individual benefit. This can be amended at any time prior to moving onto **Results**.

Quick Commission Settings

i

Multi benefit quick commission settings are for the entire product, not just this individual benefit, and can be accessed from any multi benefit form

Quick Commission will NOT be applied.

Initial Type

Indemnity

Non-Indemnity

Initial Rate (%)

100

▲▼

Renewal Rate (%)

100

▲▼

Apply

Reset

Cancel

4.3.2 Critical Illness Cover

Within the **Level Term Assurance, Decreasing Term assurance and Family Income Protection** quotations there is an option for **Critical Illness Cover** as shown in the following screen:

Clients

Products

Level Term Assurance

Decreasing Term Assurance

Income Protection

Family Income Benefit

Waiver Of Premium

Results

Apply

Quote for

Client A

Client B

Both

Cover Type

Life Cover

Critical Illness Cover

Life or Earlier Critical Illness

(no options selected)

Choose...

Critical Illness Benefit Amount (£)

Term Length

years

Cover Indexation

Level

RPI

2%

3%

4%

5%

Rates

Guaranteed

Reviewable

Quick Commission

Select Critical Illness options

You can then select the **Critical Illness Cover** option they wish to include in the quote as follows:

Critical Illness Options

Select an option

CIC Only

Yes

CIC & TPD (Any Occupation)

No

CIC & TPD (Own Occupation)

No

CIC & TPD (Suited Occupation)

No

Comprehensive

No

Close

Please note with the Multi Benefit option you can only make one selection on this screen, the system will provide a warning signal if more than one is chosen as follows:

Critical Illness Options

Only 1 option can be selected

CIC Only

Yes

CIC & TPD (Any Occupation)

No

CIC & TPD (Own Occupation)

No

CIC & TPD (Suited Occupation)

No

Comprehensive

Yes

Close



4.3.3 Level Term Assurance

If **Level Term Assurance** is selected you are able to make a selection for the quote from the following screen:

Quote

Find

Need help completing this screen?

...

?

⚙

Clients

Products

Level Term Assurance

Decreasing Term Assurance

Income Protection

Family Income Benefit

Waiver Of Premium

Results

Apply

Quote for

Client A

Client B

Both

Cover Type

Life Cover

Critical Illness Cover

Life or Earlier Critical Illness

Death Benefit Amount (£)

Term Length

years

Cover Indexation

Level

RPI

2%

3%

4%

5%

Rates

Guaranteed

Reviewable

Quick Commission

You can make a selection for **Critical Illness Cover** by selecting the appropriate button;

Cover Type

Life Cover

Critical Illness Cover

Life or Earlier Critical Illness

Clients

Products

Level Term Assurance

Decreasing Term Assurance

Income Protection

Family Income Benefit

Waiver Of Premium

Results

Apply

Quote for

Client A

Client B

Both

Cover Type

Life Cover

Critical Illness Cover

Life or Earlier Critical Illness

Critical Illness Benefit Amount (£)

Term Length

years

Cover Indexation

Level

RPI

2%

3%

4%

5%

Rates

Guaranteed

Reviewable

Quick Commission

⏪

⏩

Select this option if you wish to include critical illness cover. The benefit can be paid out on diagnosis of a specific critical illness.

4.3.4 Decreasing Term Assurance

If **Decreasing Term Assurance** is selected you are able to make a selection for the quote from the following screen:

Quote for: Client A, Client B, Both

Cover Type: Life Cover, Critical Illness Cover

Death Benefit Amount (£):

Term Length: years

Mortgage Interest Rate %:

Rates: Guaranteed, Reviewable

Quick Commission

This can include making a selection on **Critical Illness Cover** by selecting the appropriate button;

Cover Type: Life Cover, Critical Illness Cover, Life or Earlier Critical Illness

4.3.5 Income Protection

When obtaining an **Income Protection** quotation, the following screen will appear:

Quote for: Client A, Client B

Driven by Age (Cease) or Term: Cease, Term

Cease Age: 60 years

Monthly Benefit Amount (£):

Deferment Period Required: 4, 8, 13, 26, 52 weeks

Cover Indexation: Level, RPI, 2%, 3%, 4%, 5%

Rates: Guaranteed, Reviewable

Quick Commission

Please note that the term option is greyed out and you can only select **Driven by Age**.

You can make their selection from these options, please note when selecting the **Deferment period**, only one period can be selected per quotation.

4.3.6 Family Income Protection

If a quotation for **Family Income Protection** is selected the following screen will appear:

Quote

Find

Need help completing this screen?

...

?

⚙

Clients

Products

Level Term Assurance

Decreasing Term Assurance

Income Protection

Family Income Benefit

Waiver Of Premium

Results

Apply

Quote for

Client A

Client B

Both

Cover Type

Life Cover

Critical Illness Cover

Life or Earlier Critical Illness

Annual Death Benefit Amount (£)

Term Length

years

Cover Indexation

Level

RPI

2%

3%

Rates

Guaranteed

Reviewable

Select Critical Illness Cover if required

Quick Commission

The User can make their selection from these options.

4.3.7 Waiver of Premium

If **Waiver of Premium** is required, you can select this option to include it in the relevant quotation:

Quote

Find

Need help completing this screen?

...

?

⚙

Clients

Products

Level Term Assurance

Decreasing Term Assurance

Income Protection

Family Income Benefit

Waiver Of Premium

Results

Apply

Client(s) covered

Client A

Client B

Both

TPD Type

Own Occupation

Any Occupation

Suited Occupation

Deferment Period Required

4

8

13

26

52

weeks

Quick Commission

5. Results

If you are producing a number of quotes for different products, once you have completed one quote input page and moved to the next product, the results for the previous quote will be obtained and become available in the **Results** section. In this example, the input fields for the second Level Term Assurance quote are still being completed for this client, while the results of their first Level Term Assurance quote is already available in the Results section.

Quote

Find

Need help completing this screen?

Quote for

Client A

Client B

Both

Include Critical Illness Cover?

☐ No

Critical Illness Death Benefit is

Accelerated

Additional

Driven By

Benefit

Premium

Premium Frequency

Monthly

Annually

Death Benefit Amount (£)

Critical Illness Benefit Amount (£)

Term Length

years

Renewable Policy Required?

☐ No

Increasing Benefit?

☐ No

Waiver of Premium for Client A?

☐ No

Client B?

☐ No

Include Guaranteed Rates?

Yes

Include Reviewable Rates?

Yes

Clients

Products

Level Term Assurance

Level Term Assurance 2

Level Term Assurance 3

Critical Illness Cover

Income Protection

Results

Level Term Assurance

Client A £200,000 20yrs

Apply

Once the quote forms for all required product types have been completed for a client (or joint clients), click onto the first product in the **Results** area to view the results. In the example below, five quotes for three product types were requested – Level Term Assurance, Critical Illness and Income Protection (as shown in the **Products** list on the left of the screen shot above). Quotes have now been completed, so there are five results to view – these are indicated in the **Results** box on the left.

Results

Level Term Assurance

1

Client A £200,000 20yrs

Level Term Assurance 2

1

Client B £200,000 20yrs

Level Term Assurance 3

1

Joint £200,000 20yrs

Critical Illness Cover

1

Joint £200,000 20yrs

Income Protection

1

Client A Max 65 8/13/26wks





Apply

In the example below, you has chosen to view the Level Term Assurance results – a blue highlight in the **Results** box confirms this. In this screen shot, the results (premiums) for numerous products are shown. Note that if one or more providers cannot give a quote for a product, this will be shown on the corresponding **Results** page by a message in an orange line below any completed quotes:

	PruProtect Plan PruProtect	£200,000	£127.88 Reviewable Comprehensive	£2,536.91	£3.20		
	Personal Protection Menu Bright Grey	£200,000	£130.04 Reviewable Comprehensive	£2,611.11	£3.25		 10% uplift
	PruProtect Plan PruProtect	£200,000	£139.02 Guaranteed Comprehensive	£2,757.91	£3.48		
4 products declined to quote. Click to show products							


To view the details where providers have declined to quote, click on the orange line:

4 products declined to quote. Click to hide products

Provider	Product	Notes from provider
	CIC Term (Level) Friends Life Individual Protection	1. The calculated premium is below the minimum
	CIC Term (Level) Friends Life Individual Protection	1. The calculated premium is below the minimum
	CIC Term (Level) Friends Life Individual Protection	1. The calculated premium is below the minimum
	CIC Term (Level) Friends Life Individual Protection	1. The calculated premium is below the minimum

In these cases, the reason for a no-quote has been returned, but not all providers give an explanation as to why they have not quoted, in which case the **Notes for provider** will be blank.

When the Comparison report is printed to support the choice of the product, it will include a section on any product which has not been able to return a quote.

In all quotes that are returned commission information will be displayed. This can be hidden from view using the  button on the title bar. With the Income Protection quotes, you are able to quote for different deferred periods on the same page. In this case, to see the commission appropriate to that quote, use the radial buttons.

In this screen shot, currently the commission is showing for the illustrations for an 8 week deferred period, as indicated by the radial button.

Benefit	<input checked="" type="radio"/> 8 weeks	<input type="radio"/> 13 weeks	<input type="radio"/> 26 weeks	Commission (8 wks)	
				Initial	Renewal
£2,916 Reviewable	£220.25  	£154.23  	£140.15  	£3,964.50	£66.08
£2,916 Guaranteed	£246.84  	£176.36  	£143.50  	£4,443.12	£74.05

The system will also show any **Multi Benefit** products which might satisfy the criteria for all of the standalone products that have been requested as shown in the screen shot below.

You then has the option of continuing to use a standalone quote by selecting a product and clicking on the **apply** button or proceeding down the Multi Benefit route using the **proceed and apply** button.

Quote

Find

Need help completing this screen?

Sara Grimshaw

Clients

Select the products you wish to apply for below, before applying you must confirm you have read the documents supplied by the Provider. After making and confirming your selection click next to be directed to the Providers Extranet.

Products

Provider	Product	Benefit	Premium	Info	Action
Scottish Provident	Critical illness cover	£150,000	£96.79		Apply
	Self Assurance Term Personal				
	Scottish Provident (123766)				
			£96.79		

Results

Your product selection could be satisfied by one of the following multi-benefit policies:

We have made the following assumptions to provide you with a Multi Benefit quote:  
\* Waiver of premium has been included in the Multi Benefit product. (Deferment period = 13 weeks, TPD type = own occupation)  
\* Default commission settings have been used for multi benefit quotations.

4 responses pending. Click here to refresh.

Provider	Product	Premium	Info	Action
ageas	Ageas Multi Benefit Ageas Protect	£93.84		Proceed and Apply
Legal & General	L & G Multi Benefit Legal & General	£105.78		Proceed and Apply 10% uplift

4 products declined to quote. Click to show products

If you then click on the **Proceed and Apply** button, the following screen will be displayed:

Quote for Multi Benefit Product

This will open the results for Multi Benefit Policies, which will save and close your existing standalone product quote. Do you want to proceed?

Proceed

This will start a new multi benefit quote. Your existing quote will be saved and available from the find function.

Cancel

Return to the apply screen.

If you select the **proceed** button it will take you back through the Multi Benefit loop, it will pre-populate with the existing information input however you will then have to go through the Multi Benefit route again.

5.1 Multi Benefit Results

If you are producing a Multi Benefit Quotation for different products, once you have completed all of the quote input pages, the results for all the quotes will be obtained and become available in the **Results** section as shown below:

Quote

Find

Need help completing this screen?

Sara Grimshaw

Clients

Products

Level Term Assurance

Decreasing Term Assurance

Income Protection

Family Income Benefit

Waiver Of Premium

Results

Multi Benefit

Level Term X1

Decreasing Term X1

Income Protection X1

Family Income Benefit X1

Waiver Of Premium

Apply

Benefit 1: Level term

Benefit 2: Decreasing term

Benefit 3: Income protection

Benefit 4: Family income benefit

Benefit 5: Waiver of Premium

Client A

Client A

Client A

Client A

Client A

Benefit £150,000

Benefit £150,000

Benefit £1,000 pcm

Benefit £150,000

Own Occupation

Term 10 years

Term 10 years

Cease 60 years

Term 10 years

13 weeks

1 response pending. Click here to refresh

Provider	Product	Premium	Initial	Commission	Renewal	Info	Choose one
Legal & General	L & G Multi Benefit Legal & General	£135.62	£2,414.12	£2.58			10% uplift
ageas	Ageas Multi Benefit Ageas Protect	£307.91	£6,207.71	£7.69			

4 products declined to quote. Click to show products

In this example, you can view all the Multi Benefit results – as shown in left hand box under Results. In this screen shot, the results (premiums) for all the providers are shown and at the top of the screen you can view all the benefits quoted. Note that if one or more providers cannot give a quote for a product, this will be shown by a message in an orange line below any completed quotes.

5.2 Whole of Market Option

Within Weblines it is possible to set up a panel of preferred providers or to have a whole of market option. Normally, the default is the whole of market option.

For those of you who have Weblines provided by a network, a panel may have been set up. If all of the quotes returned have a blue banner in the bottom right hand corner, then this indicates that these are from the panel. If the network allows, you may be able to view and then recommend from the whole of market.

To view quotes from the whole of market, simply click on this **whole of market** button:

Cease age 65  
Monthly Benefit (maximum allowed)

IncreasingBenefit  
Includes Sam Carter

Reviewable and Guaranteed  
Monthly premiums

Whole of Market

8 weeks

13 weeks

26 weeks

Commission (8 wks)

Initial

Renewal

AVIVA	Income Protection Solutions Aviva Health	£2,916 Reviewable	£220.25	£154.23	£140.15	£3,964.50	£66.08
AVIVA	Income Protection Solutions Aviva Health	£2,916 Guaranteed	£246.84	£176.36	£143.50	£4,443.12	£74.05
Legal & General	Low Cost Income Protection Benefit Legal & General	£2,958 Guaranteed		£107.42	£102.50		

In the example above, all products have a blue ‘preferred panel’ banner in the right hand corner indicating that we are looking at results from the chosen panel.



Provider	Product	Benefit	8 weeks	12 weeks	26 weeks	Commission (8 wks)
----------	---------	---------	---------	----------	----------	--------------------



Once you have decided on the product

**Information for Quote Reference 38077128**

Date Requested: 04/10/2012 16:28:53

### Quote Details

Term 20 years  
Benefit £200,000

Provider: Legal & General

### Notes

- TIC included automatically
- Waiver deferred period has been set to 26 weeks
- FRN is unknown
- SIB number is not present - default terms used
- Quote produced based on electronic submission. Please apply online
- Quotation has been generated using today's date

### Documents

- [Personalised Illustration](#)
- [Mort and Fam Prot KFD with conversion](#)
- [OLPC Data Application Form Family & Mortgage](#)
- [OLPC Data Capture Form Interactive Underwriting Family & Mortgage](#)

### Commission returned with quote

### Initial

Initial Commission: £417.03  
Term of commission: 48 months

OK

Term	Benefit	Commission Renewal	Commission Info
20 years	£200,000	£22.09	£438.23
20 years	£200,000	£0.52	£0.55
20 years	£200,000	£0.52	£0.53
20 years	£200,000	£0.53	£0.53
20 years	£200,000	£0.53	£0.53
20 years	£200,000	£0.53	£0.53
20 years	£200,000	£0.55	£0.55

5.4 “Refreshing” a Quote Result Screen

There will be times when not all quotes come back from the providers within a short time period. If this happens, your screen will show any results which have been returned for you, and an orange bar will appear at the top of the page, to show you how many responses are pending. By “refreshing” the page, any late results (if any) which have now been received will be displayed. To refresh, click on the orange bar or use the **Refresh** button.

Cease age 65  
Monthly Benefit (maximum allowed)

IncreasingBenefit  
Includes Sam Carter

Reviewable and Guaranteed  
Monthly premiums








4 responses pending. Click here to refresh

Provider	Product	Benefit	Term				Commission (8 wks)	
			8 weeks	13 weeks	26 weeks		Initial	Renewal
	Income Protection Solutions Aviva Health	£2,916 Reviewable	£220.25 		£140.15 		£3,964.50	£66.08
		£2,916 Guaranteed	£246.84 	£176.36 	£143.50 		£4,443.12	£74.05
	Low Cost Income Protection Benefit Legal & General	£2,958 Guaranteed		£107.42 	£102.50 			

5.5 Selecting the Product

Once all the available quotes are available to you, you can view more information on any of the individual quotes by using the ‘i’ button in the **Info** column.

Term 20 years  
Benefit £200,000

Provider  
  
  
  
  


Information for Quote Reference 38077128  
Date Requested: 04/10/2012 16:28:53

Quote Details

Notes  
1. TIC included automatically  
2. Waiver deferred period has been set to 26 weeks  
3. FRN is unknown  
4. SIB number is not present - default terms used  
5. Quote produced based on electronic submission. Please apply online  
6. Quotation has been generated using today's date


Documents  
[Personalised Illustration](#)  
[Mort and Fam Prot KFD with conversion](#)  
[OLPC Data Application Form Family & Mortgage](#)  
[OLPC Data Capture Form Interactive Underwriting Family & Mortgage](#)







Commission returned with quote

Initial  
Initial Commission: £417.03  
Term of commission: 48 months


OK

Commission  
Renewal

Info  
  
Show Information

Choose one  
  
  
  
  
  


£0.52		
£0.52		
£0.53		
£0.53		
£0.53		
£0.55		

 PruProtect Essentials Plan  
PruProtect £200,000 £22.09 Reviewable £438.23 £0.55

Click **OK** to return to the **Results** screen.

Once you have decided on the quote to be used for the client, use the **Add product to cart** button in order to proceed to an **Application**:

Term 20 years Benefit £200,000		Death only Includes Sam Carter		Reviewable and Guaranteed Waiver FirstLife				
Provider	Product	Benefit	Premium	Initial	Commission	Renewal	Info	Choose one
	Mortgage Level Term - Electronic Legal & General	£200,000	£20.71 Guaranteed	£417.03	£0.52			Add product to cart
	Term - Electronic Legal & General	£200,000	£20.71 Guaranteed	£417.03	£0.52			
	Lifestyle Plus Protection Plan Bright Grey	£200,000	£20.94 Guaranteed	£420.46	£0.53			





This will add the product to the **Apply** section, and the number “1” now appears inside an oval icon in the left hand menu next to **Apply**. At the same time, the background to the chosen product has changed to green on this screen. The screen shot below shows that two products have been put into the ‘cart’.

Products	Provider	Product	Benefit	8 weeks	13 weeks	26 weeks
Level Term Assurance		Income Protection Solutions Aviva Health	£2,916 Reviewable	£220.25 	£154.23 	£140.15 
Level Term Assurance 2		Income Protection Solutions Aviva Health	£2,916 Guaranteed	£246.84 	£176.36 	£143.50 
Level Term Assurance 3		Low Cost Income Protection Benefit Legal & General	£2,958 Guaranteed			£102.50 
Critical Illness Cover		Income Protection Benefit Legal & General	£2,958 Guaranteed		£142.13 	£135.53 
Income Protection		Protection from Bright Grey Bright Grey	£2,708 Guaranteed		£154.18 	£145.25 
Results		Income Protection Cover PruProtect	£2,708 Reviewable		£185.34 	£148.85 
Level Term Assurance 1		Income Protection Cover PruProtect	£2,708 Guaranteed		£206.16 	£165.62 
Client A £200,000 20yrs	11 products declined to quote. Click to show products					
Level Term Assurance 2						
Client B £200,000 20yrs						
Level Term Assurance 3						
Joint £200,000 20yrs						
Critical Illness Cover						
Client A £200,000 20yrs						
Income Protection						
Client A Max 65 8/13/26wks						
Apply						

Once a product has been chosen for the Apply process, its cart image changes to red, and it has a minus sign. If you subsequently decide not to apply for this product, then, click on the red cart button to remove the quote from the **Apply** facility.




6 Applying

In the example below, two different products have been selected for purchase, as indicated by the number “2” in the oval icon next to “**Apply**”. By clicking in the **Apply** area on the left, it becomes highlighted in blue, and the summary screen appears to confirm the products which have been selected.

Products	Provider	Product	Benefit	Premium	Info	Action
Level Term Assurance		Level term assurance 3	£200,000	£27.61		<b>Apply</b>
Level Term Assurance 2		PruProtect Essentials Plan Accelerator				
Level Term Assurance 3		PruProtect (38081895)				
Critical Illness Cover		Income protection	£2,916	£154.23		<b>Apply</b>
Income Protection		Income Protection Solutions				
		Aviva Health (38081900)				
Results				£181.84		
Level Term Assurance						
Client A £200,000 20yrs						
Level Term Assurance 2						
Client B £200,000 20yrs						
Level Term Assurance 3						
Joint £200,000 20yrs						
Critical Illness Cover						
Joint £200,000 20yrs						
Income Protection						
Client A Max 65 8/13/26wks						
Apply						

You also have the option of applying via the Multi Benefit route as the following screen shows and as mentioned earlier in this guide.

The following screen shows the Results screen if you are applying via the Multi Benefit route:

Quote	Find	Need help completing this screen?				...	?	Sara Grimshaw
Clients	Benefit 1: Level term	Client A	Benefit £150,000	Term 10 years				
Products	Benefit 2: Decreasing term	Client A	Benefit £150,000	Term 10 years				
Level Term Assurance	Benefit 3: Income protection	Client A	Benefit £1,000 pcm	Cease 60 years				
Decreasing Term Assurance	Benefit 4: Family income benefit	Client A	Benefit £150,000	Term 10 years				
Income Protection	Benefit 5: Waiver of Premium	Client A	Own Occupation	13 weeks				
Family Income Benefit	1 response pending. Click here to refresh							
Waiver Of Premium	Provider	Product	Premium	Initial	Commission	Renewal	Info	Choose one
Results		L & G Multi Benefit	£170.70	£2,422.31	£2.59			 10% uplift
Multi Benefit	3 products declined to quote. Click to show products							
Level Term X1								
Decreasing Term X1								
Income Protection X1								
Family Income Benefit X1								
Waiver Of Premium								
Apply								

You will also be given the Multi Benefit comparison information if you are applying via the standalone route and the option to select this alternative route if you wish.

The screen below shows the **Results** screen if you are applying via the Standalone route but applying for Multi Benefit products:

Select the products you wish to apply for below, before applying you must confirm you have read the documents supplied by the Provider. After making and confirming your selection click next to be directed to the Providers Extranet.

Provider	Product	Benefit	Premium	Info	Action
Scottish Provident	Critical illness cover	£150,000	£96.79		Apply
	Self Assurance Term Personal				
	Scottish Provident (123766)				
			£96.79		

Your product selection could be satisfied by one of the following multi-benefit policies:

We have made the following assumptions to provide you with a Multi Benefit quote:  
 \* Waiver of premium has been included in the Multi Benefit product. (Deferment period = 13 weeks, TPD type = own occupation)  
 \* Default commission settings have been used for multi benefit quotations.

1 response pending. Click here to refresh

Provider	Product	Premium	Info	Action
ageas	Ageas Multi Benefit	£93.84		Proceed and Apply
	Ageas Protect			
Legal & General	L & G Multi Benefit	£105.78		Proceed and Apply
	Legal & General			

4 products declined to quote. Click to show products

To view additional information at this point in the application process, click on the 'i' button in the **Info** column for the relevant product. To go ahead and apply for a product, click on the **Apply** button in the **Action** column.

A pop-up box will appear:

**Important Documents**

Please read and accept before applying

**Notes**

1. TIC included automatically
2. Waiver deferred period has been set to 26 weeks
3. FRN is unknown
4. SIB number is not present - default terms used
5. Quote produced based on electronic submission. Please apply online
6. Quotation has been generated using today's date

**Documents**

Illustration - [Personalised Illustration](#)  
 KFD - [Mort and Fam Prot KFD with conversion](#)  
 Proposal - [OLPC Data Application Form Family & Mortgage](#)  
 Data Capture Form - [OLPC Data Capture Form Interactive Underwriting Family & Mortgage](#)  
 Check to indicate you have read all documents ☐

Continue

The box displays any important notes from the providers about this product and the application process for it – please read these notes carefully. For some of these pop ups, there will be a scroll bar - use the scroll bar on the right of the box to move down or up through its contents.

You may download relevant documents from here by using the clickable links – documents may be printed or stored locally on your PC if required. As part of the compliance process please click in the small white box to confirm that you have read the associated documents. Then click **OK**.

At this stage, all work has been completed in the quotation process, and the next step is to apply for the product either on-line, using the selected provider's extranet facility or on paper. If multiple products are being bought, they must be applied for one at a time.

Once the extranet login screen for the provider has appeared, you may log in using your provider logon credentials and apply for the product.

NB: Webline will automatically pre-populate some of the client and product data directly into the extranet forms for you – how much is completed is dictated by the provider's IT environment.

Once the application has been completed submitted via the extranet or on an application form, close the window and navigate back to Webline.






## 6.1 Finishing the Application

There are three potential scenarios for finishing the application:

- 1) For some products a paper application form will need to be completed. When the **Apply** button is clicked, the paper application will be uploaded for you to print. Once this has been done, click the tick next to the **Continue** button to confirm that the plan has been applied for.
- 2) For some products that can be applied for electronically, click the **Apply** button and an extranet window will open to apply for the plan. Complete the application, return to this page to click the tick next to the **Continue** button to confirm that the plan has been applied for.
- 3) For all electronic L&G, Zurich and Aviva products, click the **Apply** button and an extranet window will open to apply for the plan. Once finished, the tick next to the **Continue** button will automatically be clicked to confirm that the plan has been applied for.







The screen below shows the Standalone apply screen:

Select the products you wish to apply for below, before applying you must confirm you have read the documents supplied by the Provider. After making and confirming your selection click next to be directed to the Providers Extranet.

Provider	Product	Benefit	Premium	Info	Action
	Level term assurance Mortgage Level Term - Electronic Legal & General (38077128)	£200,000	£20.71		<b>Continue</b> 
	Income protection Income Protection Solutions Aviva Health (38077179)	£2,916	£176.36		<b>Apply</b> 
		<b>£197.07</b>			

Continue to apply for any other plans in this section. Once all plans have been applied for, the page should look like this.




Select the products you wish to apply for below, before applying you must confirm you have read the documents supplied by the Provider. After making and confirming your selection click next to be directed to the Providers Extranet.

Provider	Product	Benefit	Premium	Info	Action
	Level term assurance Mortgage Level Term - Electronic Legal & General (380771128)	£200,000	£20.71		<a href="#">Submitted</a> 
	Income protection Income Protection Solutions Aviva Health (380771179)	£2,916	£176.36		<a href="#">Submitted</a> 
		£197.07			

The word **Apply** has been replaced by **Submitted** and there is a lock to confirm that this piece of research has now been locked and no changes can be made to it.




And this screen shows the Multi Benefit apply screen:

Select the products you wish to apply for below, before applying you must confirm you have read the documents supplied by the Provider. After making and confirming your selection click next to be directed to the Providers Extranet.

Provider	Product	Premium	Info	Action
	Multi benefit L & G Multi Benefit Legal & General (130223)	£279.40		<a href="#">Apply</a> 
		£279.40		

Click in the Continue button to apply via the extranet.

Select the products you wish to apply for below, before applying you must confirm you have read the documents supplied by the Provider. After making and confirming your selection click next to be directed to the Providers Extranet.

Provider	Product	Premium	Info	Action
	Multi benefit L & G Multi Benefit Legal & General (130223)	£279.40		<a href="#">Continue</a> 
		£279.40		







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:

Quotes

04/10/2012

Level Term Assurance 2

Level Term Assurance 2

Client B £200,000 20yrs

Level Term Assurance 3

Critical Illness Cover

Income Protection

2

1

1

1

1

Provider

Product

ZURICH

Level Prot Zurich

ZURICH

Level Prot Zurich

Select Quote To Reload

Client A £200,000 20yrs

The following screen if relevant to a Multi Benefit quote:

Quote

Find

Mr Bruce Willis

Quotes

11/10/2013

11/10/2013

Multi Benefit

Level Term X 1

Decreasing Term X 1

Income Protection X 1

Family Income Benefit X 1

Waiver Of Premium

09/10/2013

09/10/2013

Benefit 1: Level term

Benefit 2: Decreasing term

Benefit 3: Income protection

Benefit 4: Family income benefit

Benefit 5: Waiver of Premium

Provider

Product

Legal & General

L & G Multi Benefit

Legal & General

**Quote** Find ... ? John

Search Sam Carter

Term 20 years Benefit £200,000 Death only Includes Kerry Carter Reviewable and Guaranteed Waiver None Click reload or request access to this quote

Provider	Product	Benefit	Premium	Commission	
				Initial	Renewal
ZURICH®	Level Protection Plan (Gtd) - Electronic Zurich	£200,000	£14.22 Guaranteed	£302.25	£0.36
ZURICH®	Level Protection Plan (Gtd) - Paper Zurich	£200,000	£14.22 Guaranteed	£282.10	£0.36
bright grey™	Lifestyle Plus Protection Plan Bright Grey	£200,000	£14.15 Guaranteed	£284.92	£0.36

Quotes

- 04/10/2012 ▼
- Level Term Assurance 2
- Level Term Assurance 2
- Client B £200,000 20yrs
- Level Term Assurance 3
- Critical Illness Cover
- Income Protection

Benefit 1: Level term  
Benefit 2: Decreasing term  
Benefit 3: Income protection  
Benefit 4: Family income benefit  
Benefit 5: Waiver of Premium

Client A  
Client A  
Client A  
Client A  
Client A

Benefit £150,000  
Benefit £150,000  
Benefit £1,000 pcm  
Benefit £1,000  
Own Occupation

Term 10 years  
Term 10 years  
Cease 60 years  
Term 10 years  
13 weeks

Click reload or quote to access this quote

	Provider	Product	Premium	Commission		Info
				Initial	Renewal	
<div> <div> </div> <div> </div> </div>	L & G Multi Benefit Legal & General	£70.79	£93.52	£0.10		

3 products declined to quote. Click to show products

## 9 Documents

The screenshot shows the top navigation bar of the Webline interface. On the left is a 'More...' button with a speech bubble icon. To its right is the 'powered by webline' logo and the text 'Version 2.2.6.0'. Further right is a user profile section displaying 'John Smith' with a dropdown arrow. Below the 'More...' button, a dark grey menu is open, listing four options with corresponding icons: 'General Documents' (document icon), 'Provider Documents' (document icon), 'Privacy Statement' (shield icon), and 'Terms of Use' (checkmark icon).

9.1 Provider Documents

To view or print Provider documents, click on **Provider Documents** within the **More** tab.

Within this section, you will find a list of providers. Click on the provider required and their available documents will be displayed, as shown in this example below. Click **Open** to download and view, print or store the document(s) you want, one at a time.

AEGON Scottish Equitable
Ageas Protect
Aviva
Aviva Health
Bright Grey
Friends Life Individual Protection

The screen shown on the left does not show the complete list of providers.

Click on the Provider and a list of documents will be shown:

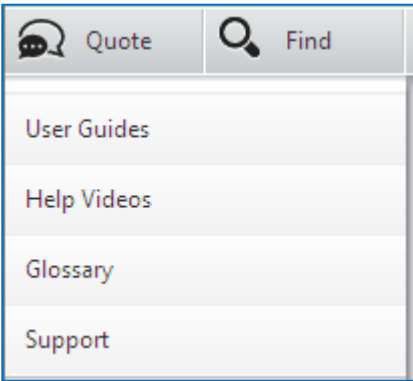
Provider Documents for Friends Life Individual Protection		
Friends Life Individual Protection		
Best Doctors - Adviser	Brochure	Open
HealthLine	Brochure	Open
Best Doctors - Member	Brochure	Open
Data Capture Form	Data Capture Form	Open
Underwriting Guide - Sales Aid	General Document	Open
Tim Clarke Case Study	General Document	Open
Reinstatement Cover	General Document	Open
Reasons Why Letters for Critical Illness, Critical Illness with Life and Life Cover	General Document	Open
Fracture Cover - Sales Aid	General Document	Open
Critical Illness Cover - Sales Aid	General Document	Open

10 Help

Click on the question mark tab located at the top right of your screen to access the Help section. Click on the **Help** button:



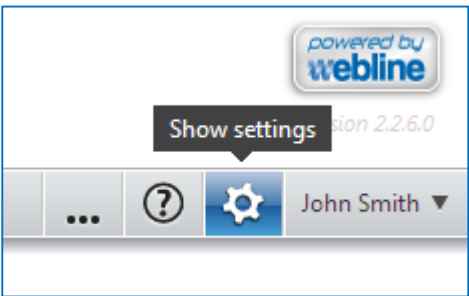
And the following list is shown:



**User Guides** give access to this guide.  
**Help Videos** are available at the four stages of the process.  
**Glossary** provides a glossary of commonly used terms.  
**Support** gives the telephone number and email address for the Capita Financial Software Support Team.

11 Settings

The **Settings** tab on the top right of the screen allows you to view your Account Details, such as Company name and contact details. Your company details cannot be changed from this area. Please contact Support to request any changes to your Account Details.

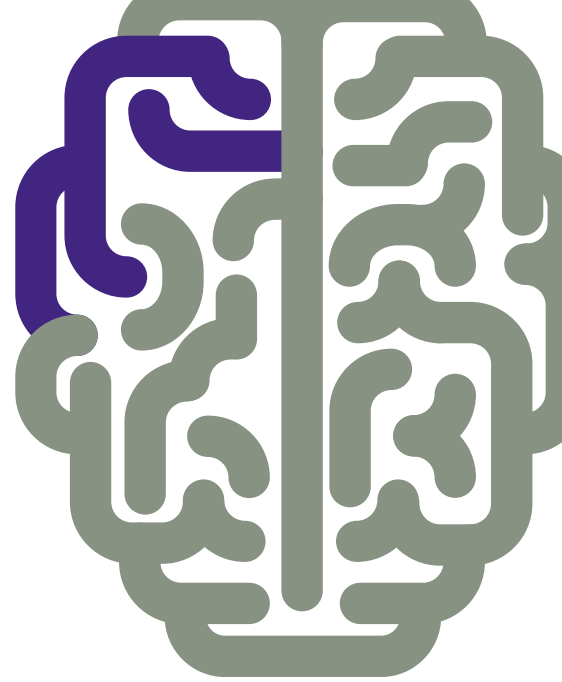


12 Logging Out of Weblane

To log out of the system, click on your name at the top right of the screen and select **Log Off**.



**User Options** displays your user information.  
Your details cannot be changed from this area.  
Please contact Support to request any  
changes to your You Details.



## Products & Services from Synaptic Software:

SYNAPTIC **CLIENT CARE**

SYNAPTIC **COMPARATOR**

SYNAPTIC **MODELLER**

SYNAPTIC **PRODUCT & FUND**

SYNAPTIC **RISK**

SYNAPTIC **WEBLINE**

SYNAPTIC **WEB SERVICES**



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SYNAPTIC