



## Webline integration

Webline is an on-line service (similar to The Exchange and Assureweb) that provides quotes (with the ability to take-up) for Income Protection, Accident Sickness & Unemployment Protection, Term insurance, Family Income Benefit, Mortgage Protection, Whole of Life assurance, etc, much of which is still unregulated and can be sold by General Insurance brokers as well as IFAs

Once you have entered the required details you can access quotes through Durell and then choose to either take up or save the quote. If you proceed and take up the quote you will be able to view notes (e.g. definitions and comments about waiver of premium) and view documents (i.e. the key features and associated documentation). Once taken up, the policy details are automatically entered into your Durell system and you will be directed to the insurer's secure portal for the final take up through Webline. However if you choose to just save the quote (i.e. for reference or take up at a later date) a pdf document will be saved to the client's record in Durell, listing the quotes. These saved quotes can then be recalled for take up for up to 30 days.

Durell currently offer quotations from the following providers:



# Webline Integration

This is a time saving feature which has the potential to dramatically reduce costs if you are currently using another provider. We offer Webline for £120.00+vat per year per company (not just per user) but if you take up at least 36 policies through your Durell system we will refund the entire charge, so potentially this service is FREE. We can provide a no obligation demonstration of this feature, to book please call 01823 326324.

## Benefits to you will be:

- ✓ Save time as data doesn't need to be re-keyed
- ✓ Most Life Protection business is unregulated, and can therefore be sold by General Insurers as well as Financial Advisers (n.b. your Durell system can be upgraded for both Life and General business free of charge).
- ✓ Provided your business takes-up 36 such policies per year through Webline this service will be FREE. If less than 36 it'll only cost £120+VAT per year.
- ✓ Even if you end-up paying for Webline note that it is just one charge per Durell system, not per individual.
- ✓ Quotes can be saved in a client's Document Viewer for take-up at a later time.

## You will need:

- ✓ A Durell Solution (e.g. Financial Adviser)
- ✓ A broadband Internet connection.
- ✓ Version 5.57 or later, which can be downloaded from the Durell website (only available to supported users).
- ✓ To start the setup process by clicking on the blue and yellow Webline button in the toolbar, and agreeing to the terms and conditions
- ✓ To have agencies for the insurers with which you wish to take-up Webline business