

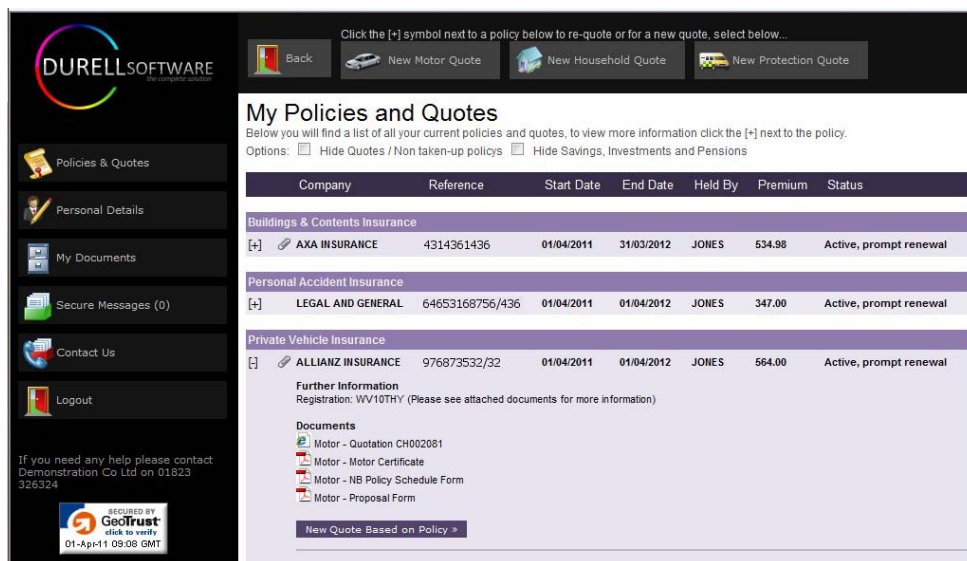
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### Durell's Web-link (Online Client Facing Services)

- ✓ Policy list
- ✓ Re-quote online
- ✓ Document store
- ✓ Personal details
- ✓ Secure messaging

## Web-link: Online Client Facing Services



The screenshot shows the Durell Web-link interface. At the top, there are navigation buttons: Back, New Motor Quote, New Household Quote, and New Protection Quote. Below this is the 'My Policies and Quotes' section, which includes a sub-header and instructions: 'Below you will find a list of all your current policies and quotes, to view more information click the [+] next to the policy. Options:  Hide Quotes / Non taken-up policies  Hide Savings, Investments and Pensions'. The main content is a table with columns: Company, Reference, Start Date, End Date, Held By, Premium, and Status. The table lists three policies: Buildings & Contents Insurance (AXA INSURANCE), Personal Accident Insurance (LEGAL AND GENERAL), and Private Vehicle Insurance (ALLIANZ INSURANCE). Below the table, there is a 'Further Information' section for the selected policy, including registration details and a list of documents (Motor - Quotation, Motor - Motor Certificate, Motor - NB Policy Schedule Form, Motor - Proposal Form). A 'New Quote Based on Policy' button is also visible.

If you want to stop losing clients to Internet insurers and need a strategy to keep clients and grow your business then Durell's Web-link could be for you. We have developed the Web-link to run from your own website (also known as online "Client Facing Services"). It lets your clients log-in to their own secure page to list policies, check renewal quotes online, and have a safe store for their documents.

Having a "Client login" button on your website will encourage your clients to visit it more often. This interaction with your website will give you a powerful new direct and on-going communications link to promote products and services.

Once on their own private page, the next benefit is it will give them a single location for all their insurances. Instead of having numerous bits of paper stuffed in drawers they'll now have a single location with everything they need on it. When it comes to renewals they'll be able to check their own quotes online without re-keying any details, as these get pre-populated direct from the policies in Durell. Should they need it, there's also a secure messaging system so they can contact you without the worry of insecure emailing.

This Web-link system is hosted via a secure website, all included in the cost, which is equivalent to one extra Durell user-licence (i.e. either £44+VAT per month, or £250+VAT up-front and £27.50+VAT per month). **As a special offer, until April 30th we will waive the £250+VAT up-front fee on all Web-link orders received.** You will also need one extra Insurecom user licence (at £55+VAT extra per month) to display motor and household quotes for all of your agencies, where you choose which products to include.



*"Suddenly you'll have another reason for your website, and a way of fighting back against the online insurers."*

Iain Waugh,  
Operations Manager

## DON'T FORGET...

Durell's support desk is manned from 9am until 5pm, from Monday to Friday, where our staff are available on 01823 334142.

The quickest way to receive help for support queries is by phoning the support team on the above number.

## Weblines

If you would like to expand your product range you could use Weblines to offer quotes for term assurance, income and mortgage protection. Weblines is free provided your company takes-up 36 or more cases per year. Even if you fail to hit this target the charge is only £120+VAT per business per year. It can also be added to a Web-link to offer your clients these quotes online. The details of all quotes will automatically be stored on your Durell system in the clients' Document Viewers. For more information please contact us.

## Discounted Online Training Until 30th April

Although Durell is easy to use and comes with an online "Help" system that fully documents the new contract enquiry program, we still recommend you invest in training in order to get the best from it.

Until 30th April we are offering up to 2 hours of online training (per company) for just £55+VAT, which represents a 50% saving on our standard charge.

We can help set up your system (e.g. help install UNIPASS certificates) and as with all our paid training, you get to choose the subjects and the pace.

**To book your discounted online training please call us on 01823 326324 before April 30th.**

## New Free Group Training Sessions Announced

The next free group training sessions are as follows:



### 18th May (General Broker users):

Renewal lists, MTA process, Accounts (incl. commission transfer and client bank reconciliation)



### 15th June (Financial Adviser users):

RDR Special: Client relationship management, Fee timers, TCF reports, Web-link demo, Management reports, Accounts (incl. VAT and retainers)



### 6th July (all users):

Templates, Reports, Complaints, Data management/cleansing (incl. spread sheets and merging clients and policies), Backing-up data

There won't be a session in August but sessions will resume in September. These sessions are free to attend, will be held at our offices in Taunton from 10.30am until 3.30pm and will include lunch. There are a maximum of 8 places available at each session which will be allocated on a first come, first serve basis. If you are interested in attending please contact us as soon as possible to book a place.

## New Member of Staff Joins Durell

Ben England joined us in January and is working alongside Iain in our sales and training department. Ben has a background in accounts and will be responsible for on-going Customer Care so over the next few months he will be contacting you for a review and to introduce himself. These reviews will enable us to hear your thoughts and experiences of Durell and enable us to help with any queries you may have, including updating your system and backing-up your data.

## Durell Staff Development

Durell recognises the importance of on-going staff development. Over the last couple of years our support staff have obtained Microsoft Certified status in various operating systems and servers. The more familiar our staff are with Microsoft products the better we can help you with technical queries.