

Working with The Product Area (Insurance Details Screen)

Other Details – key dates of the application are recorded here either manually or through completion of the Worklist

Main – details of the insurance requirements populated from the Fact Find

Replacement – allows details of any cancelled policy to be recorded

The screenshot shows a software window titled "Product Details" with a blue header and a close button in the top right. The window is divided into several sections. At the top, there are fields for "Product Type" (Insurance), "Sub Type" (Level Term Assurance), "Status" (Enquiry), "Provider" (AEGON Scottish Equitable), "Client(s)" (Evans, Crystal & Evans, Christine), "Next review date" (25/06/2013), and "Case Reference" (771254). A "New Business" checkbox is checked. Below these fields are tabs for "Work List", "Commission", "Tasks and Diary", "Notes", "Documents", "Compliance", and "Insurance". The "Main" tab is selected, showing "Term Assurance" details: "Sum Assured" (100,000.00), "Term Years" (20), "Benefit Basis" (Level), and "By" (). There are also radio buttons for "Guaranteed Premium", "Waiver of Premium", and "Terminall Illness Benefit", all set to "Yes". A "Quote" button is visible at the bottom of the main content area. At the bottom of the window, there is an "External submission" checkbox, an "eNBS" button, and "Delete" and "Close" buttons.

Sub-type – the drop-down list includes the following product types:- Level and Decreasing Term Assurance, Critical Illness, Income Protection, PPI and Buildings & Contents

Quote – a quote button is currently enabled for PPI and Buildings and Contents providing a link with Paymentsshield and Halifax for integrated quotations. The buttons will be enabled for other areas of protection in a future release.