

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 returned from Exchange or manually input

Replacement – allows details of any cancelled policy to be recorded

eNBS – an eNBS can be sent from the Key to the Sesame website using this button. The BMU reference number is returned to the Key.

Product Details (New Business)

Product Type: Insurance | Sub Type: Combined Term / CIC | New Business

Status: Proposed | Provider: Norwich Union

Client(s): Boatman, Jamie | Next review date: 1 | Case Reference: 1049757

Description: [Empty]

Buttons: Review/Quote/Apply

Work List | Commission | Tasks and Diary | Notes | Documents | Compliance | Insurance

Tabs: Main | **Other Details** | Replacement

Combined Term / CIC

Family Income Benefit: | Category: Mortgage Protection

Sum Assured: 150,000 | CI Sum Assured: 80,000

Term Years: 15 | Whole of life

Benefit Basis: Level | By: [Empty]

Guaranteed Premium: Yes No

Waiver of Premium: Yes No

Terminal Illness Benefit: Yes No

Assigned: Yes No

In Trust: Yes No

Buttons: Term/Life/CIC

Submitted Externally | **eNBS** | Sesame sale ref: 401439558 | Close