

B&C Referral Quote

This powerpoint shows how to submit B&C Referral quotes!

B&C stands for 'Building and Contents' this is insurance for buildings.

We ask the client if they want their building to be covered and submit them to Premier financial to be quoted.



Firstly...

Firstly to go the Buildings and Contents Insurance <https://www.bnc-ins.co.uk/>, to submit your quote?

Once you're on the website click on 'Submit Leads Now' which is found in the second house below.

After this, a login screen will appear. All logins should be on the Create Finance Spread Sheet. Fill out the required fields and login!

The screenshot shows the homepage of Premier Insurance Brokers Ltd. The header includes the company name and navigation links: Home, Register, Contact, and The Lounge. The main content area is titled 'Buildings & Contents Insurance' and 'PREMIER INSURANCE BROKERS LTD - THE HOME OF HOME INSURANCE'. It features a 'One Simple Process' section with three steps: 1. Register as an Introducer, 2. Submit your leads following the link below, and 3. Sit back, relax - We do the rest!! A house-shaped icon with 'Premier Insurance Brokers Ltd' inside is shown. Below this is a 'Complete Transparency!!' section with a list of promises: 'We will call your client when we say', 'We Guarantee to only sell products introduced by our introducers - NO CROSS SELLING!!!', 'Commissions will be paid every year for the lifetime of the policy', 'No minimum referral requirements', and 'Committed to provide a service unrivalled by our competitors'. At the bottom, there is a testimonial from Ken Middleton and two house-shaped icons. The first icon says 'REGISTER AS AN "/>

The screenshot shows the login page for Premier Insurance Brokers Ltd. The header is the same as the homepage. The main content area is titled 'Buildings & Contents Insurance' and 'PREMIER INSURANCE BROKERS LTD - THE HOME OF HOME INSURANCE'. Below this is a section titled 'Login To The Lounge:' with instructions: 'Please enter your Broker Reference, Username, Password and the answer to the validation, then click the 'Login' button. forgotten your login?'. There are three input fields: 'Broker Ref:', 'Username:', and 'Password:'. Below these is a verification sum: 'Please enter the answer to the verification sum below: 19 + 8' with a box containing the number '27'. A 'LOGIN' button is at the bottom.

What to do

The Broker Lounge

LOGGED IN : VISHAL KUNDALIA, CREATE FINANCE LIMITED

Password Update Log Out Sofa **New Leads**

Welcome to the Lounge Vishal

Take a seat, and relax, let us manage all your leads and see what we have been doing on your behalf.

Look around at your own pace

Got New Leads? enter them quickly & easily here

Want to **see how your existing leads are developing?** view progress of your leads here

Need to **review policies sold?** click here for details of all sold policies including renewals etc.

If you can't find what you are looking for or have some questions then please don't hesitate to contact us.

Bank:

Total Leads Submitted: **5**
Pending Leads: **0**
Policies Sold: **2**
Non-Active Policies: **3**
Lapsed Policies: **0**

SEND IN NEW LEADS

VIEW LEADS PROGRESS Send in your new leads - we will

VIEW POLICIES SOLD

Once you have logged. Your screen will look like this. Just click on 'Submit New Leads' in the red box and it will take you to another screen where you input your clients details.

The details you require to submit a new lead will be found on the front screen of Mortgage Keeper. Use the security address as that will be the property the client is moving into.

Submit A New Lead:

Please use the form below to enter new lead details, please complete all details then press the 'Submit Lead' button at the bottom of the page:

CLIENT DETAILS

Miss
Jilly
Rapley
Date of Birth: 25 05 0000
Shot Tower DE1 2AW
07873352709
07873352709
jilly@createfinance.co.uk
solicitor@solicitor.co.uk
Any
Friday 26th Oct, 18

EXISTING POLICY DETAILS:

CURRENT POLICY PROVIDER
£: PRICE TO BEAT
POLICY RENEWAL DATE (IF KNOWN)
NOTES (IF APPLICABLE)
SUBMIT LEAD

Jilly Rapley

Shot Tower 1 Morledge Derby DE1 2AW
Daytime Phone:
Evening Phone:
Mobile Phone: 07873352709
Date of Birth: 25/05/2000
Email: jilly@createfinance.co.uk
Reference: 9857

Remove this applicant

Make this a commercial mortgage

Create New Application With These Applicants

Application Reference: CF-7680
Lender Reference:
Security Address: Shot Tower 1 Morledge Derby
[Copy from 1st Applicant]
Postcode: DE1 2AW

The screen will ask the best time to call your client – If you do not know put Any or 6pm as people are normally back from work then and today's date.

If there are two applicants on the case input applicant two details in the notes section.

Please be aware we do not submit new B&C leads when the case is a remortgage.