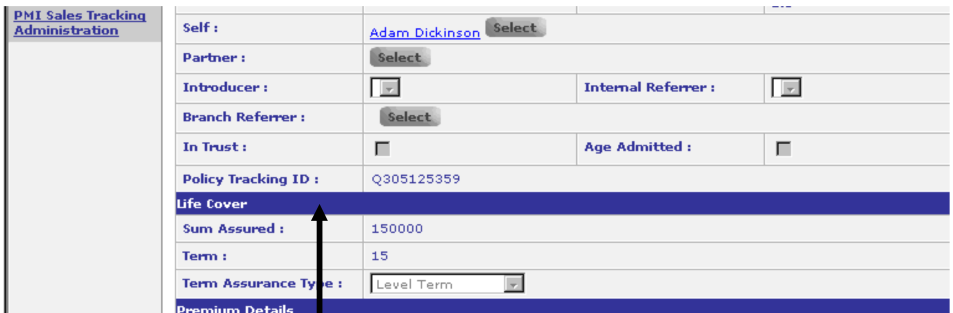
FRIENDS PROVIDENT SALES TRACKING INTEGRATION

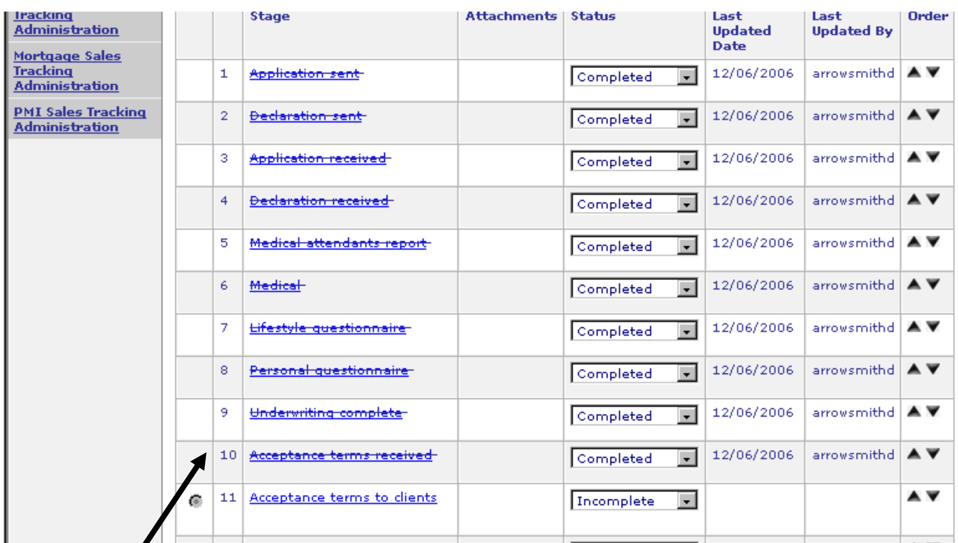
Friends Provident Sales Tracking Integration

Toolbox has now enhanced its sales tracking functionality so that advisors and administrators can take advantage of integration with the Friends Provident website.

Please see the guide titled ‘Adding Policies’ on the PTFS Website. Ensure that you select ‘Friends Provident’ as the provider for the policy.



In order to take advantage of the integration with the Friends Provident tracking facility via their website please ensure that you enter the Q reference given by Friends Provident into the ‘Policy Tracking ID’ field on the policy screen.



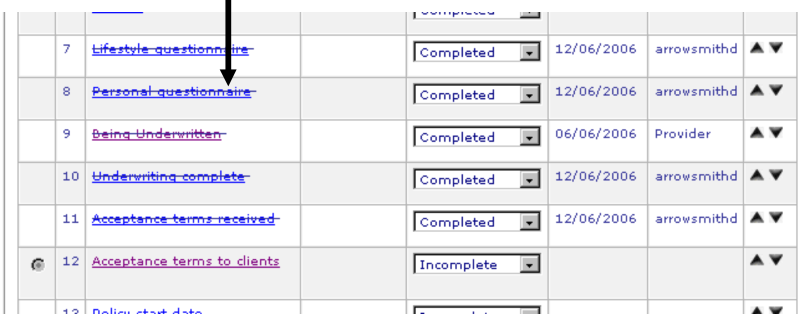
Click onto ‘This Policy Sales Tracking’ in the left hand navigation. The Friends Provident website will integrate into this screen to provide you with updates on the progress of your clients case. Friends Provident will enter new stages into the tracking as per the progress of the case.

Friends Provident will enter the following steps into the Sales Tracking screen:

‘Application Registered’ – This will be listed after the ‘Declaration Sent’ stage

‘Awaiting Underwriting’ – This will be listed after the ‘Declaration Received’ stage

‘Being Underwritten’ – This will be listed after ‘Personal Questionnaire’



7	~~Lifestyle questionnaire~~	Completed	12/06/2006	arrowsmithd	▲▼
8	~~Personal questionnaire~~	Completed	12/06/2006	arrowsmithd	▲▼
9	~~Being Underwritten~~	Completed	06/06/2006	Provider	▲▼
10	~~Underwriting complete~~	Completed	12/06/2006	arrowsmithd	▲▼
11	~~Acceptance terms received~~	Completed	12/06/2006	arrowsmithd	▲▼
12	Acceptance terms to clients	Incomplete			▲▼

‘Offered Standard’ – This will be listed after ‘Acceptance Terms Received’

‘Offered Non Standard’ – This will be listed after ‘Acceptance Terms Received’

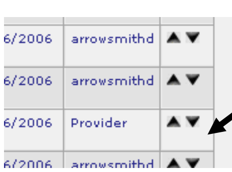
‘NTU’ – This will be listed after ‘Acceptance Terms to Clients’

‘Declined’ – This will be listed after ‘Acceptance Terms Received’

‘Postponed’ – This will be listed after ‘Acceptance Terms to Clients’

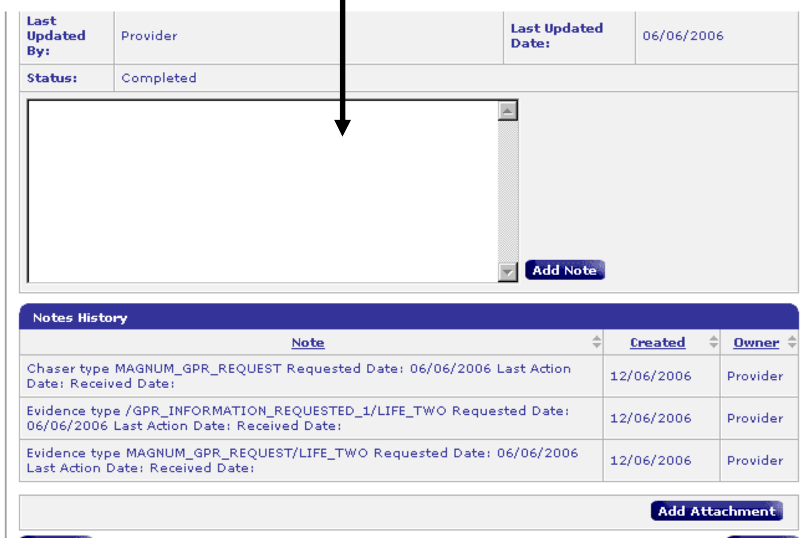
‘Policy Live’ – This will be listed after ‘Acceptance Terms to Clients’

You will be able to see which stages Friends Provident has entered by looking at the ‘Last Updated By’ column. If Friends Provident has entered the stage it will state that ‘provider’ has updated that stage.



6/2006	arrowsmithd	▲▼
6/2006	arrowsmithd	▲▼
6/2006	Provider	▲▼
6/2006	arrowsmithd	▲▼

When Friends Provident has entered a stage into the sales tracking for a policy, the notes fields will also be entered into the history.



You can view the notes by clicking onto the name of the step in the tracking list or by clicking onto 'View All Notes' at the top of the screen.

Friends Provident completes updates every 24 hours to the PTFS Toolbox Sales Tracking screens

For further information of using the Sales Tracking facility on Toolbox, then please view the 'Sales Tracking' guide on the PTFS Website.