

the financial services **T****lbox**[©]

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.

PMI Sales Tracking Administration	Self :	Adam Dickinson	Select
	Partner :	Select	
	Introducer :	<input type="text"/>	Internal Referrer : <input type="text"/>
	Branch Referrer :	Select	
	In Trust :	<input type="checkbox"/>	Age Admitted : <input type="checkbox"/>
	Policy Tracking ID :	Q305125359	
	Life Cover		
	Sum Assured :	150000	
	Term :	15	
	Term Assurance Type :	Level Term <input type="text"/>	
	Premium Details		

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.

Tracking Administration	Stage	Attachments	Status	Last Updated Date	Last Updated By	Order
Mortgage Sales Tracking Administration	1 Application sent		Completed	12/06/2006	arrowsmithd	▲▼
PMI Sales Tracking Administration	2 Declaration sent		Completed	12/06/2006	arrowsmithd	▲▼
	3 Application received		Completed	12/06/2006	arrowsmithd	▲▼
	4 Declaration received		Completed	12/06/2006	arrowsmithd	▲▼
	5 Medical attendants report		Completed	12/06/2006	arrowsmithd	▲▼
	6 Medical		Completed	12/06/2006	arrowsmithd	▲▼
	7 Lifestyle questionnaire		Completed	12/06/2006	arrowsmithd	▲▼
	8 Personal questionnaire		Completed	12/06/2006	arrowsmithd	▲▼
	9 Underwriting complete		Completed	12/06/2006	arrowsmithd	▲▼
	10 Acceptance terms received		Completed	12/06/2006	arrowsmithd	▲▼
	11 Acceptance terms to clients		Incomplete			▲▼
	12 Policy start date					▲▼

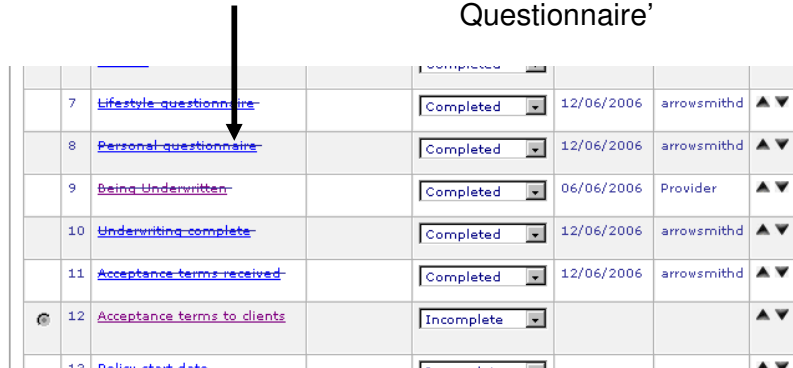
Click onto 'This Policy Sales Tracking' in the left hand navigation. The Friends Provident website will integrate into this screen to provide you with updates on the progress of your clients case. Friends Provident will enter new stages into the tracking as per the progress of the case.

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			▲▼
13	Policy start date				▲▼

‘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’

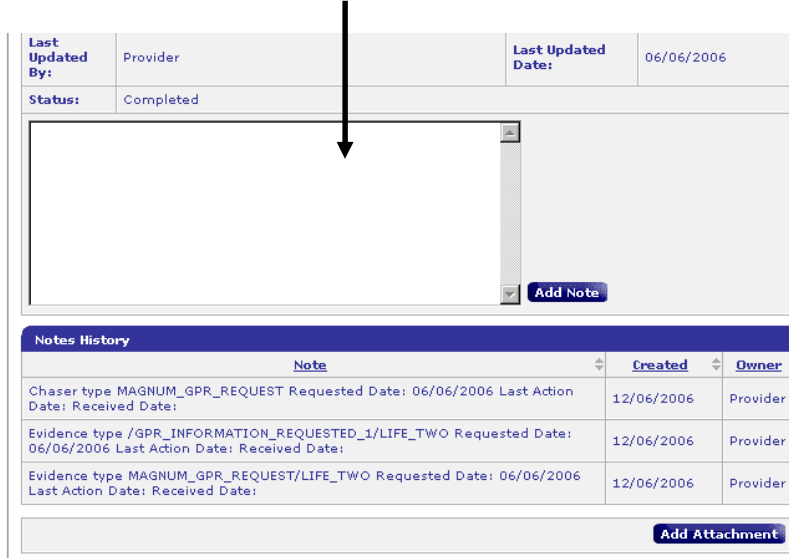
‘Policy Live’ – This will be listed after ‘Acceptance Terms to Clients’

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.



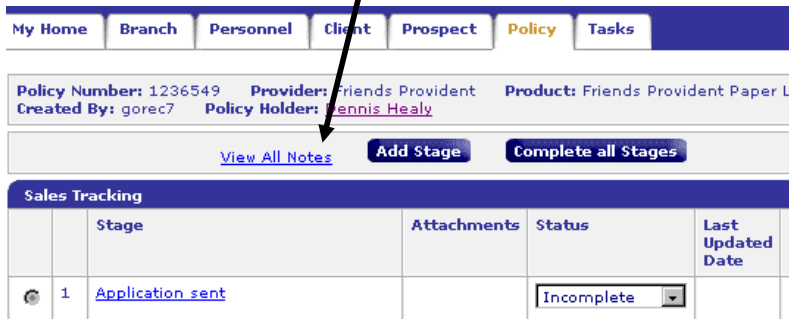
6/2006	arrowsmithd	▲▼
6/2006	arrowsmithd	▲▼
6/2006	Provider	▲▼
6/2006	arrowsmithd	▲▼

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



Last Updated By:	Provider	Last Updated Date:	06/06/2006
Status:	Completed		
<div style="border: 1px solid gray; height: 80px; width: 100%;"></div> <div style="text-align: right; margin-top: 5px;">Add Note</div>			
Notes History			
Note	Created	Owner	
Chaser type MAGNUM_GPR_REQUEST Requested Date: 06/06/2006 Last Action Date: Received Date:	12/06/2006	Provider	
Evidence type /GPR_INFORMATION_REQUESTED_1/LIFE_TWO Requested Date: 06/06/2006 Last Action Date: Received Date:	12/06/2006	Provider	
Evidence type MAGNUM_GPR_REQUEST/LIFE_TWO Requested Date: 06/06/2006 Last Action Date: Received Date:	12/06/2006	Provider	
Add Attachment			

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.



My Home Branch Personnel Client Prospect **Policy** Tasks

Policy Number: 1236549 Provider: Friends Provident Product: Friends Provident Paper Li
Created By: gorec7 Policy Holder: Dennis Healy

[View All Notes](#) [Add Stage](#) [Complete all Stages](#)

Sales Tracking					
	Stage	Attachments	Status	Last Updated Date	L U B
1	Application sent		Incomplete		

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.