

CREATING A FIRST2PROTECT REFERRAL POLICY ON TOOLBOX

Please note: For commission to be reconciled by the Fees team, referral cases require a Toolbox Workflow containing the policy number.

CREATE NEW CLIENT OR SEARCH FOR EXISTING CLIENT

Click Create View Sales on the left-hand side to take you through to create a new workflow.

Description – free type

Fact Find Type – choose referral service

(ensure correct adviser name is selected)

Click Add – taking you through to referral workflow

Create New Sales Workflow

Description :	<input type="text" value="Mr Bloggs referral"/>
Factfind type :	<input type="text" value="Referral Services"/>
Advisor :	<input type="text" value="Tester Household(ID 23145)"/>
<input type="button" value="Add"/>	

ONCE ON REFERRAL WORKFLOW

Click on **Create Policies** on the left-hand side

Create **New Policy**

Choose **Add New Referral Instruction** from drop-down

Click on **Create** to take you through to referral services page

Create New Policy

Include Existing Policy :	<input type="text" value="None Available"/>
<input type="text" value="Add New Referral Instruction"/>	<input type="button" value="Create"/>

Select Service Provider – Choose First2Protect

Instruction Type choose – B&C Referral (F2P)

– BTL Referral (F2P)

– Non Standard (F2P)

Click **Search**

This will bring up the product details

Choose this product by clicking on **Select**

Referral Service Search

Select Service Provider

Instruction Type

Select Product

Name	Provider	Start Date	Expiry Date	Category	
B&C Referral (F2P)	First2Protect	26/11/2018		Referral Services	<input type="button" value="Select"/>

POLICY PAGE

Complete Policy Details on the Policy Page

Amend Policy Status from drop-down

Click **Save**

Source Details

Referral Service Provider: Product *:

Policy Status:

Policy number: ⓘ

Start Date: ⓘ End Date: ⓘ

Sales Workflow: Date Entered:

Advisor:

Notes

Notes: