

The Key Release Notes

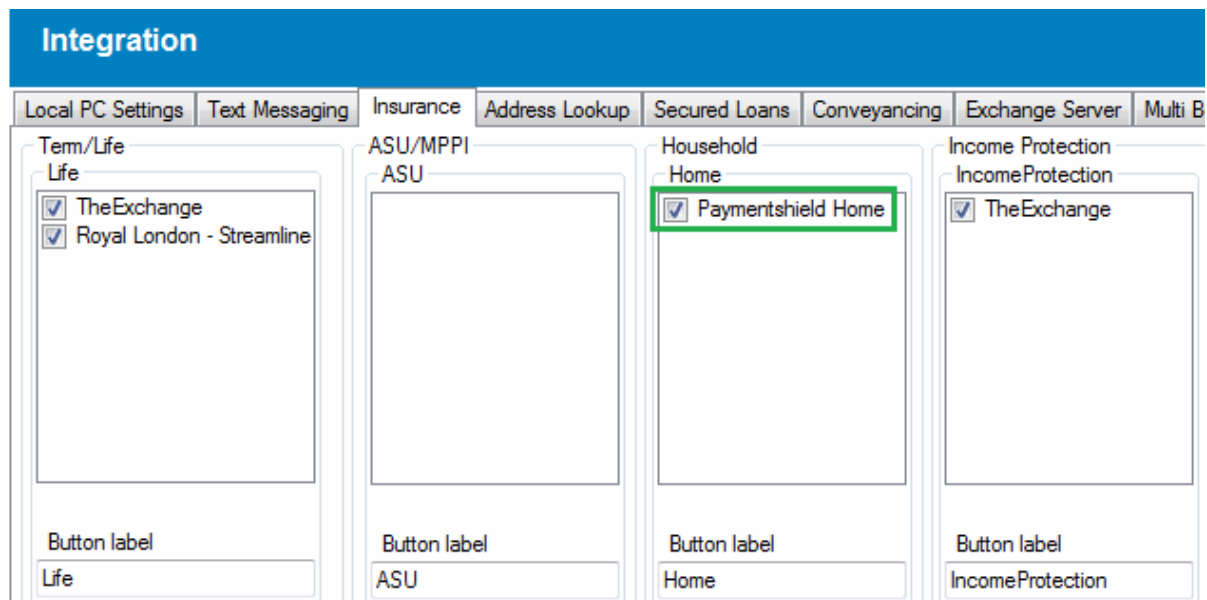
Version 5.5.20 update

Detailed below are changes relating to the Paymentsshield integration available in this release.

Integration Setup

- 1 – Log into The Key with a user that has the **'User can edit system settings'** permission.
- 2 – Open Setup > Integration > Insurance & select the **'Paymentsshield Home'** checkbox

Figure 1 – Integration Setup



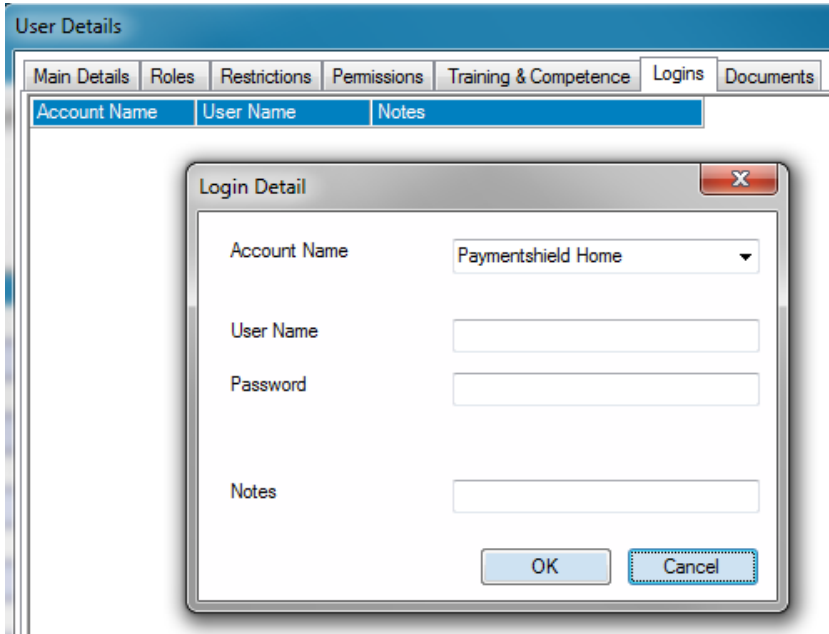
The screenshot shows the 'Integration' settings page with the 'Insurance' tab selected. The page is divided into four main sections: Term/Life, ASU/MPP/ASU, Household, and Income Protection. Each section has a list of providers with checkboxes and a 'Button label' field below. In the 'Household' section, the 'Paymentsshield Home' checkbox is checked and highlighted with a green border. The 'Term/Life' section has 'TheExchange' and 'Royal London - Streamline' checked. The 'Income Protection' section has 'TheExchange' checked.

Local PC Settings	Text Messaging	Insurance	Address Lookup	Secured Loans	Conveyancing	Exchange Server	Multi B
Term/Life		ASU/MPP/ASU		Household		Income Protection	
Life		ASU		Home		IncomeProtection	
<input checked="" type="checkbox"/> TheExchange				<input checked="" type="checkbox"/> Paymentsshield Home		<input checked="" type="checkbox"/> TheExchange	
<input checked="" type="checkbox"/> Royal London - Streamline							
Button label		Button label		Button label		Button label	
Life		ASU		Home		IncomeProtection	

- 3 – The Paymentsshield username & password can be stored against each users profile. Users just need to open Setup > Users > Logins and then select **Paymentsshield Home** from the Account Name dropdown. Storing the user name & password will allow The Key to automatically populate Paymentsshield with these credentials.

Advisors must be pre-registered with Paymentsshield & will be assigned a branch number. N.B. the branch number does not need to be stored in The Key.

Figure 2 - User login management

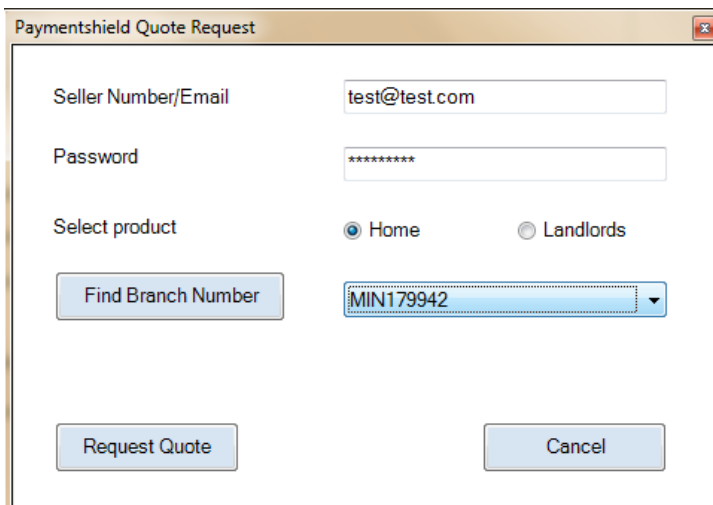


Using the Integration

Initiating the Quote

- 1 – Select **'Quote'** from the Fact Find > Insurance > Building & Contents screen.
- 2 – The Quote Request screen will load. If configured, the credentials will automatically populate from the **Users > Logins** area. Otherwise the credentials will need to be manually entered. If the credentials have been manually entered the user will also need to click **'Find Branch number'**. Selecting **'Request Quote'** will launch Paymentshield

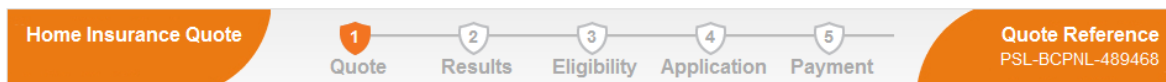
Figure 3 - Quote Request Screen



The Paymentshield Environment

1 – The Paymentshield Quote screen will load with the client data pre-populated from The Key. Some additional data may be required before the advisor can select the ‘Get Quotes’ button, any missing mandatory data will be flagged with an exclamation mark.

Figure 4 - Paymentshield Quote Screen



Step 1- Quote

Applicant Details

Applicant 1

* Title	<input type="text" value="Mr"/>	
* First Name	<input type="text" value="Damien"/>	
* Surname	<input type="text" value="Hurst"/>	
* Date of Birth	<input type="text" value="19/07/1975"/>	

2 – The results page will then load with the product & the underwriters on the Paymentshield panel that can provide a quote for the given criteria. The quote can be modified from this screen to amend the excess, add legal cover etc.

Note that each underwriter will offer two quotes. The quote on the left will be the ‘Chosen’ cover, this is usually the standard cover offered by the Paymentshield product, i.e. Buildings cover of £500,000 & Contents cover £50,000. The underwriter will also offer the ‘Alternative’ cover. This is the higher level of cover offered by the Paymentshield product, i.e. Buildings cover of £1,000,000 & Contents cover £75,000.

If the cover amount requested was greater than £500,000 for Building cover or £50,000 then the Chosen cover will be for the higher level of cover amount.

Selecting ‘Apply Now’ will enable the advisor to progress through to application.




Figure 5 - Quote Results Screen

AMEND YOUR QUOTES

Buildings Excess £200	Contents Excess £100	Home Emergency Cover <input type="checkbox"/>	Legal Expenses Cover <input type="checkbox"/>	REFRESH QUOTES
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Please note: On the 1st June 2017, the Insurance Premium Tax (IPT) rate is due to rise from 10% to 12%. As a result the below quotes will increase if taken out on or after this date. For example a current quote of £250 a year will rise to £254.55

YOUR HOME INSURANCE QUOTATIONS

	<p style="text-align: center; margin: 0;">YOUR CHOSEN COVER OPTIONS & QUOTES</p> <p style="text-align: center; margin: 0; font-size: small;">Buildings Cover: £500,000 Contents Cover: £50,000</p>	<p style="text-align: center; margin: 0;">ALTERNATIVE COVER OPTIONS & QUOTES</p> <p style="text-align: center; margin: 0; font-size: small;">Buildings Cover: £1,000,000 Contents Cover: £75,000</p>
	<p style="text-align: center; background-color: #ffcc00; margin: 0;">BEST PRICE</p> <p style="text-align: center; font-size: large; margin: 0;">£399.01</p> <p style="text-align: center; margin: 0;">Annually</p> <p style="text-align: center; font-size: small; margin: 0;">Show Breakdown</p>	<p>Buildings A. D. Included <input checked="" type="checkbox"/></p> <p>Contents A. D. Included <input checked="" type="checkbox"/></p> <p style="text-align: center; background-color: #334d5c; color: white; padding: 5px; margin: 5px 0;">APPLY</p> <p style="font-size: small; margin: 0;"> <input type="checkbox"/> Email Quote <input type="checkbox"/> Print Quote <input type="checkbox"/> Export Quote </p>
	<p style="text-align: center; font-size: large; margin: 0;">£416.50</p> <p style="text-align: center; margin: 0;">Annually</p> <p style="text-align: center; font-size: small; margin: 0;">Show Breakdown</p>	<p>Buildings A. D. Included <input checked="" type="checkbox"/></p> <p style="text-align: center; background-color: #334d5c; color: white; padding: 5px; margin: 5px 0;">APPLY</p>
	<p style="text-align: center; background-color: #ffcc00; margin: 0;">BEST PRICE</p> <p style="text-align: center; font-size: large; margin: 0;">£426.29</p> <p style="text-align: center; margin: 0;">Annually</p> <p style="text-align: center; font-size: small; margin: 0;">Show Breakdown</p>	<p>Buildings A. D. Included <input checked="" type="checkbox"/></p> <p>Contents A. D. Included <input checked="" type="checkbox"/></p> <p style="text-align: center; background-color: #334d5c; color: white; padding: 5px; margin: 5px 0;">APPLY</p> <p style="font-size: small; margin: 0;"> <input type="checkbox"/> Email Quote <input type="checkbox"/> Print Quote <input type="checkbox"/> Export Quote </p>

3 – The user now has the ability to select & choose which quote to return. Users select the requested quotes via the ‘Export Quote’ button. These are available on both the ‘Chosen’ cover & the ‘Alternative’ cover quotes. If all quotes are selected then all will be returned to The Key, if none are selected then no quotes will be returned to The Key.

Figure 6 - Export Quote Functionality

	<p style="text-align: center; background-color: #ffcc00; margin: 0;">BEST PRICE</p> <p style="text-align: center; font-size: large; margin: 0;">£399.01</p> <p style="text-align: center; margin: 0;">Annually</p> <p style="text-align: center; font-size: small; margin: 0;">Show Breakdown</p>	<p>Buildings A. D. Included <input checked="" type="checkbox"/></p> <p>Contents A. D. Included <input checked="" type="checkbox"/></p>	<p style="text-align: center; background-color: #334d5c; color: white; padding: 5px; margin: 5px 0;">APPLY</p> <p style="font-size: small; margin: 0;"> <input type="checkbox"/> Email Quote <input type="checkbox"/> Print Quote <input checked="" type="checkbox"/> Export Quote </p>
	<p style="text-align: center; font-size: large; margin: 0;">£416.50</p> <p style="text-align: center; margin: 0;">Annually</p> <p style="text-align: center; font-size: small; margin: 0;">Show Breakdown</p>	<p>Buildings A. D. Included <input checked="" type="checkbox"/></p> <p>Contents A. D. Included <input checked="" type="checkbox"/></p>	<p style="text-align: center; background-color: #334d5c; color: white; padding: 5px; margin: 5px 0;">APPLY</p> <p style="font-size: small; margin: 0;"> <input type="checkbox"/> Email Quote <input type="checkbox"/> Print Quote <input checked="" type="checkbox"/> Export Quote </p>

N.B. This ‘Export Quote’ checkbox is only available in the Residential product. If the Landlord product is selected then all quotes will be returned to The Key.

4 – The user does have the option to lower the premium by reducing commission on this screen

Figure 7 - Commission Sacrifice

SET YOUR COMMISSION

You can lower the premium by reducing your commission.

The maximum premium flex you can select is **15%** of the original commissionable premium.

0.00 (% of Original Commissionable Premium)

Please note: If you choose to flex the premium the commission you will receive for this case will be paid on an Annual Indemnity basis.

Returning Quotes to The Key

1 – The user must click the ‘**Save & Quit**’ button for quotes to be returned into The Key – closing the Paymentshield screen via the red cross will not return any quotes into The Key.

2 – After clicking ‘**Save & Quit**’ the below screen will load allowing for additional documents to be returned in addition to the Policy documents that are returned in all cases. Advisors can also choose the payment method (direct debit / credit card etc)

Figure 8 - Policy Document Selection

Paymentshield Quote Results

Select payment method to return

Select additional documents, if required

Monthly Direct Debit

Price summary documents

- Monthly Direct Debit
- Monthly Direct Debit 2 Months Free
- Annual Direct Debit
- Annual Credit Card
- Annual Debit Card

A Policy document and Policy Summary document will be returned for all quotes, as well as a Quote and Application Summary document when an application has been made.

Continue

3 – The Key will automatically create a new Insurance Product for each selected quote containing quote data populated from Paymentshield and any documents.

Figure 9 - Key B&C Product

Product Details (New Business)

Product Type: Insurance Sub Type: Buildings/Contents New Business
 Status: Proposed Provider: Paymentsshield
 Client(s): Nash, Nicholas & Nash, Valerie
 Description: Paymentsshield Next review date: Case Reference: AG1001234
 [Review] [Apply]

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

Main | Property | Other Details | Replacement

Buildings
 Cover amount £: 500,000
 Is unlimited cover required? Yes No
 Accidental damage?
 Voluntary excess £: 200
 No claims discount: 0 years
 Additional protection required for:
 Legal costs Yes No
 Home emergency Yes No

Contents
 Cover amount £: 50,000
 Is unlimited cover required? Yes No
 Accidental damage?
 Voluntary excess £: 100
 No claims discount: 1 years
 Protection required for personal possessions? Yes No

Figure 10 - B&C Quote Documents

Description: Paymentsshield Next review date: Case Reference: AG1001234
 [Review] [Apply]

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

All Documents relating to this product

Created Date	File Type	Category	Description	Last Modified Date	Final Version	Portal
11/05/2017 11:45	PDF file	Integration Docum...	Policy Document	11/05/2017 11:46	<input type="checkbox"/>	<input type="checkbox"/>
11/05/2017 11:45	PDF file	Integration Docum...	Policy Summary	11/05/2017 11:46	<input type="checkbox"/>	<input type="checkbox"/>
11/05/2017 11:45	PDF file	Integration Docum...	Price Summary Monthly Direct Debit	11/05/2017 11:46	<input type="checkbox"/>	<input type="checkbox"/>
11/05/2017 11:45	PDF file	Integration Docum...	Statement of Demands and Needs	11/05/2017 11:46	<input type="checkbox"/>	<input type="checkbox"/>

Premium £: 24.24 Frequency: Monthly

Provider Contact Details
 [Search] [View/Edit]

Administrator: MI Admin 2nd Administrator:

Product Description
 Quote Ref: PSL-BCPNL-489468. We've searched our panel of insurers to find you our lowest premium Annual Direct Debit :£ 264.43 Annual Credit Card :£ 268.40 Annual Debit Card :£ 264.43 Monthly Direct Debit 2 Months Free :£ 29.09 Monthly Direct Debit :£ 24.24

4 – After a quote is complete a 'Review' button will be available in the product. This will load the integration at the quote results screen enabling the advisor to easily progress the quote to application. Any documents generated during the application process will be returned to The Key.

Figure 11 - Quote Review / Apply

The screenshot shows a web form titled "Product Details (New Business)". The form contains several fields: "Product Type" (Insurance), "Sub Type" (Buildings/Contents), "Status" (Enquiry), "Provider" (Aviva), "Client(s)" (Hurst, Damien), "Next review date" (empty), "Description" (Paymentshield), and "Case Reference" (empty). A "Review" button is located at the bottom right of the form, highlighted with a red rectangular box. Below the form, there is a navigation bar with tabs for "Work List", "Commission", "Tasks and Diary", "Notes", "Documents", "Compliance", and "Insurance".

END OF DOCUMENT