



PREQUO LEAD GENERATOR

RELEASE NOTES

NOVEMBER 2020

INTRODUCTION

There have been a number of enhancements to the PreQuo Lead Generator recently.

This document contains information regarding the following new features:

- INCOME PROTECTION BENEFIT ADDED
- EXPORT ENQUIRIES TO A SPREADSHEET
- ADMIN USERS CAN SEND PASSWORD REMINDERS
- DELETING PROMPTS
 - Deleting User
 - Deleting Firm

INCOME PROTECTION BENEFIT

We have now added in the option to include an indicative premium for Income Protection.

This option can be enabled upon request.

Once enabled it will add an additional data capture field for the client/partner salary:

What is your employment status?
 Employed Self-Employed


What is your approximate monthly income after tax?
£ 2,000 per month

John Smith, what is your annual salary?
£ 25,000 per year


[Proceed to results](#)

On the results screen, there will now be a new benefit box, detailing Income Protection:

Have you considered?

 **CRITICAL ILLNESS INSURANCE**
£48,000 Include this for £8

This cover would provide you with a lump sum payment equivalent to £2,000 monthly for 24 months in the event of suffering a serious illness such as a heart attack, stroke, cancer or other listed condition.

 **INCOME PROTECTION** Include your cover for £9

This cover will help you keep up with your mortgage/rent payments and other financial commitments if you are off work sick due to illness or disability. Update the fields below to refine your premium.

Your occupation: Your sick pay duration:

You can refine your premium by adding in your occupation and also changing the deferred period

Clicking “Include your cover” will add the benefit to your basket:

My Policy Summary

Life Insurance **£6 / month**
Single Life Cover, Decreasing benefit
13 year term, £250,000

Critical Illness Insurance **Not included**
Single Life Cover, Decreasing benefit,
13 year term, £60,000

Income Protection Cover **£10 / month**
Cover to age 65
Payment period 2 years
Three month deferred period
Paying you £600 per month

An indication of the users request for Income Protection will be shown on the enquiries list:

1
2
...
31
<
>

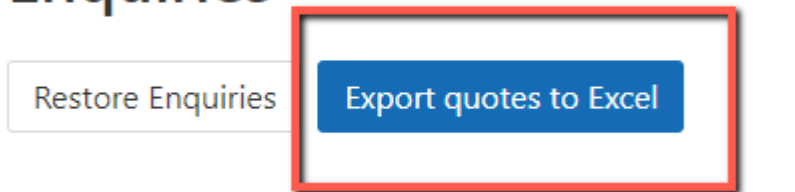
Sum Assured (£)	CIC Amount (if applicable) (£)	Term	Premium quoted	Includes IP?	Campaign (if applicable)	Processed
£250,000	£0	14	£36	Yes	None set	Not yet processed

EXPORTING ENQUIRIES TO SPREADSHEET

You can now export the entire list of your client enquiries to a spreadsheet.

From the enquiries list, click on the “Export quotes to Excel” button. This will download the spreadsheet to your downloads folder.

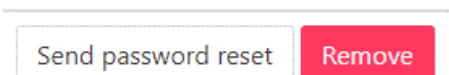
Enquiries



ADMIN USERS CAN SEND PASSWORD REMINDERS

Any existing admin user can now send out a password reminder to any of their other user accounts:

Actions



DELETE PROMPTS

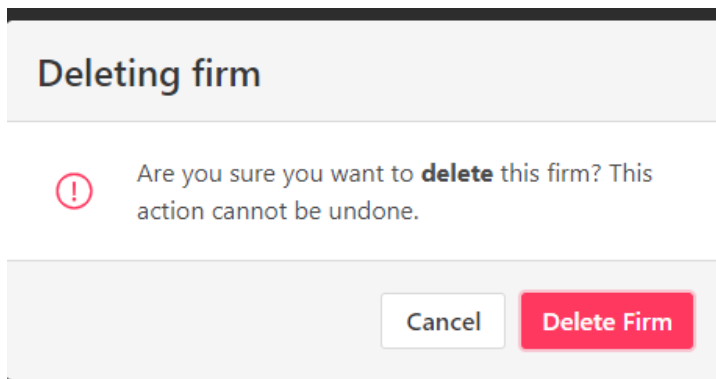
- Deleting Firms

We have renamed the delete button at the firm level to be more clear, which now states: "Delete Firm"



- Confirmation prompt

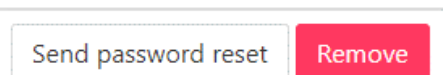
Upon clicking the button, you will now be prompted to confirm you are sure you wish to continue:



- Remove users

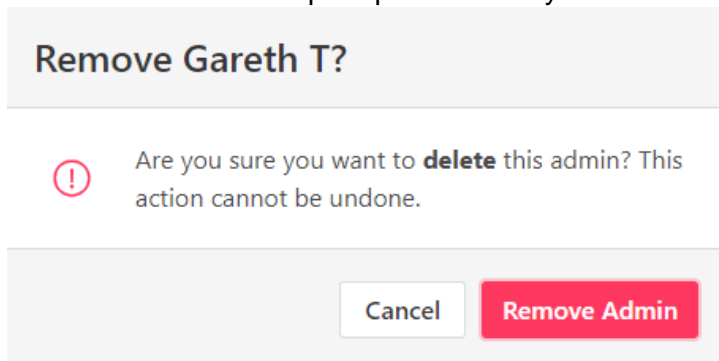
We have made the delete user buttons red, so they stand out more:

Actions



- Remove user prompt

We have also added a prompt to confirm you wish to delete the selected user:



Should you require any further information regarding the information above, please contact our customer support team on uk.support@ipipeline.com or call 0345 408 4022.

Regards

Scott Machin
Product Manager

