

TOOLBOX RELEASE

FIRST2PROTECT - CUSTOMER REFERRAL PROCESS

INDIVIDUAL CLIENT > CUSTOMER REFERRAL

You are now able to create a referral to First2Protect via Toolbox directly and this can be done via a Manual Referral.

Manual Referral

Within the Individual Client Details section you will see Legitimate Interest to Refer section – this will be used in conjunction with the on-going development of Toolbox with being able to make direct referrals to Third Parties who PRIMIS have agreements with

Legitimate Interest to Refer

[History](#)

- General Insurance
- Estate Agents
- Legal Services
- Conveyancing
- Surveyors and Valuers

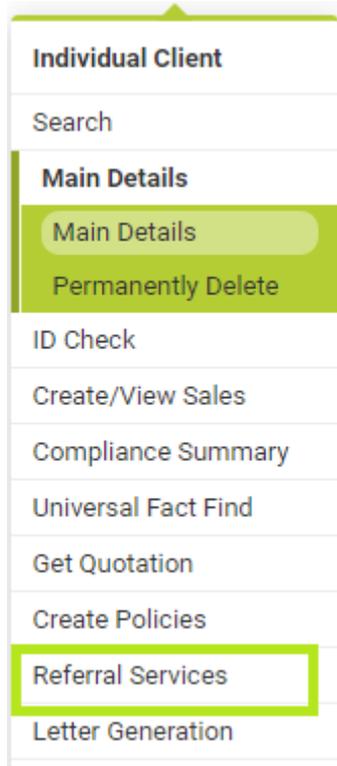
From time to time Your Information will be shared with or transferred to third parties who we believe will be able to assist us with your enquiry or application, or who are able to support your needs via our service. Where we transfer Your Information to a third party, this will include but may not be limited to, product specialists (including those within our Network and other Appointed Representatives of the Network such as First2Protect), estate agents, providers of legal services such as conveyancing, Surveyors and Valuers.

Your Information is only transferred where we believe this to be required due to your particular circumstances and/or in each case for the purposes to progress your mortgage and/or insurance enquiry and to provide you with our professional services.

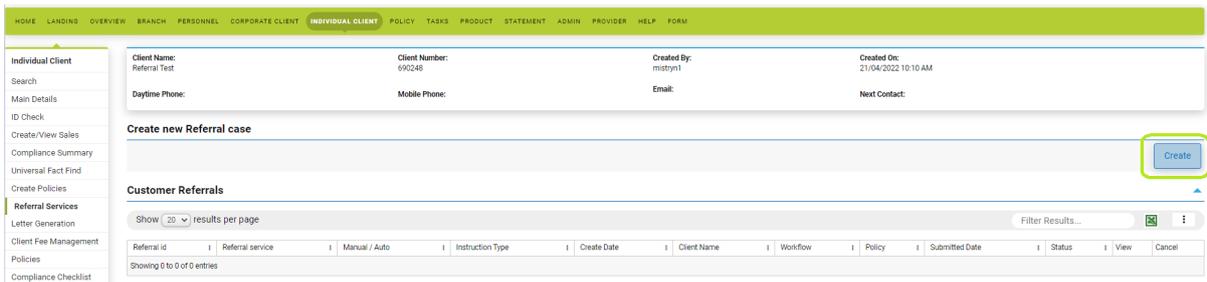
Please note that this sharing of Your Information does not entitle such third parties to send you marketing or promotional messages: it is shared for the purpose of ensuring we can adequately fulfil our responsibilities to you.

We do not envisage that the performance by us of our service will involve Your Information being transferred outside of the European Economic Area.

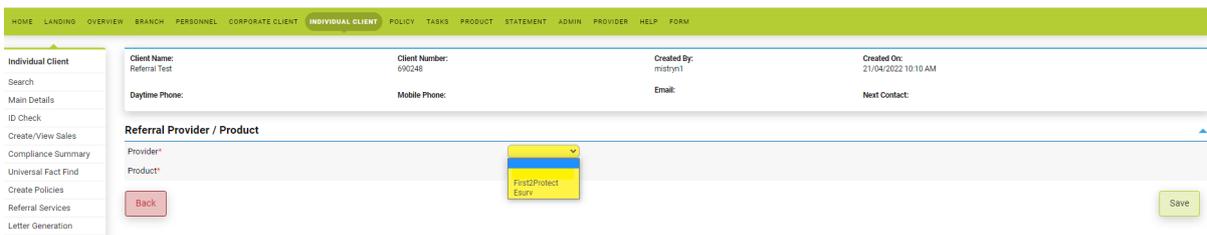
To create a referral for your client click on the Referral Services section detailed within the left hand navigation tree.



Then click the create button:



This will display a list of available Providers and associated Products. Please select the Provider – First2Protect:



This will display the following 3 Product options:

Once Provider and Product is selected where the Legitimate Interest to Refer has not been indicated within the client main details page you will need to mark this as being provided and click the Update button (this will also automatically update the details held on the main details page).

Once updated the Referral Form will be displayed for completion and will automatically pull through any data already held for the client within Toolbox.

Mandatory information required will be indicated as yellow boxes for completion.

Main Proposer Details

Title*	Mr
Forename*	Referral
Surname*	Test
Gender*	▼
Date of Birth*	21/04/1990
Email Address	<input type="text"/>
Daytime telephone number	<input type="text"/>
Evening telephone number	<input type="text"/>
Mobile telephone number*	[]
House/Flat Name or Number*	<input type="text"/>
Postcode*	B37 7ES
Find Address	
Address Line 1*	3 Bickenhill Lane
Address Line 2	<input type="text"/>
City*	BIRMINGHAM
County	<input type="text"/>
Country	UNITED KINGDOM
Are you a UK Resident	<input type="radio"/> Yes <input type="radio"/> No
Occupation	<input type="text"/>
Nature of Business	<input type="text"/>
Employment Status*	▼

If the referral is in a joint name, select the Joint Application tick box and the Joint Proposers details will display which can be completed.

Joint Proposer Details

Joint Application ?

Title

Forename

Surname

Gender

Date of Birth

Daytime telephone number

Evening telephone number

Mobile telephone number

Relationship to Proposer

Where the risk address is different to the client's contact details then tick the risk address box and this will display the property details address section which can be completed.

Property Details

Risk Address (Tick if different to postal)

No of Bedrooms

Property Type

Wall Construction

Year Property Built

Roof Construction

Then complete the remaining sections of the referral form, the disclaimer tick box is mandatory to select.

Additional Details

Are you aware of any major defects of non-standard construction? Yes No

Refurbishment Required?

Type Of Loan*

Type of Tenancy Agreement

Type of Tenant

Tenure

Is there any part of the property to be let? Yes No

Mortgage Lender

Solicitor contact name

Solicitor Firm name

Solicitor contact email

Time to Call*

Day to Call*

Please arrange a day & time appointment for First2Protect to call. Calls take approximately 15 minutes however we request a longer slot to allow for high call volumes. Although every effort will be made to meet the requested time, high demand after 5pm may require calls to be made in the morning or afternoon.

Notes

Please add additional comments (if required) to help F2P assist your customer. If the case is non-standard, please note the scenario

Disclaimer

By ticking this box, you confirm you have read the privacy policy and that the customer has consented for their data to be passed to First2Protect Insurance Services for the purpose of providing an insurance quotation

<http://www.first2protect.co.uk/privacy-notice>

Please note there is an attachment section at the bottom of the form where any attachments added will be accessible by First2Protect.

Attachments

Created Date	Attached By	File Name	Name
<input type="button" value="Add Attachment"/>			
<input type="button" value="Back"/>			
<input type="button" value="Save"/>			

Once all details have been entered on the referral form click on Save. This will then return you to the Customer Referral Grid where you will see your referral with the status 'Open' in the Customer Referral summary table.

Customer Referrals

Show 20 results per page Filter Results...

Referral id	Referral service	Manual / Auto	Instruction Type	Create Date	Client Name	Workflow	Policy	Submitted Date	Status	View	Cancel
118	First2Protect	Manual	B&C Referral	21/04/2022	Referral Test				Open	View	Cancel

Showing 1 to 1 of 1 entries

PLEASE NOTE THE REFERRAL HAS NOT AS YET BEEN SENT THROUGH TO FIRST2PROTECT – TO DO THIS YOU NEED TO COMPLETE THE FOLLOWING STEPS.

Click on view option alongside you referral – this will then take you back into the referral form.

Scroll down to the bottom if you happy with all the information click on SEND

Attachments

Created Date	Attached By	File Name	Name

Back Cancel Add Attachment Edit **Send**

You will receive a warning message to confirm that you wish to send the referral – click on confirm if you wish to proceed.

Confirmation

Are you sure you wish to send this referral ?



Confirm



Cancel

On confirming the submission of the referral, the referral grid will show that the workflow and policy attached to this referral has been created automatically for you.

Once the referral has been sent across to First2Protect the Status of the referral will automatically update to 'Submitted'

Customer Referrals

Show 20 results per page Filter Results...

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118	First2Protect	Manual	B&C Referral	21/04/2022	Referral Test	First2Protect First 2 Protect B&C Referral 118	F2ReferralTerm118		Submitted	View	

Showing 1 to 1 of 1 entries

As the referrals are not sent to First2Protect immediately, via the form you can access the link the online referral form for First2Protect which once completed, will send your referral across to First2Protect straight away.

Important Notice

Please note this referral will be sent to First2Protect overnight.

If the referral requires an urgent call today, please do not proceed with this referral through Toolbox and use the following link instead:

[Referral Form - First2Protect](#)

GI Quote Engine – B&C & BTL: Unable to meet Disclaimers

Previously on the B&C and BTL quote engines if your client could not meet all the Disclaimers on the first page of either, there is wording that reads:

The screenshot shows the 'B&C' section of the quote engine. A red box highlights the text: 'Incorrect disclosure could mean a policy claim is not met and a policy could be made null and void.' Below this, a green box highlights a paragraph: 'Please confirm the following statements are true. If you are unable to confirm one or more of the statements are true, the case can be referred to our Household specialist team [here](#) or call 01392 849763.' The list of statements includes: 'The property to be insured (including garage and outbuildings)', 'Is in a good state of repair', 'Is not undergoing renovation or construction work', 'Is self-contained and is the Proposer's permanent residence - not a holiday home, weekend/weekday home or mobile home', 'Is not occupied by any one other than the family members, e.g. Tenants or Paying guests', 'Is not left unoccupied for any long period exceeding 30 consecutive days', 'Is roofed 80% or more with slates, clay or concrete tiles, concrete or metal', and 'Is not used for business other than administrative or clerical purposes'.

When the hyperlink [here](#) was selected it would navigate you to the online referral form for First2Protect which once completed, will send your referral across to First2Protect straight away.

However when this link is selected it will not redirect you to the manual referral form page, pre populating the Provider to First2Protect and the Product as First2Protect Non Standard Referral. This will have any details already pre-populated and will allow you to complete the form and refer to First2Protect via Toolbox.

The screenshot shows the 'Referral Provider / Product' section of the form. A green box highlights two dropdown menus: 'First2Protect' for the Provider and 'First 2 Protect Non Standard Referral' for the Product. Below this is the 'Legitimate Interest to Refer' section with a checked checkbox for 'General Insurance*' and an 'Update' button. The 'Main Proposer Details' section is partially visible, showing fields for Title (Mr), Forename (Referral), Surname (Test), Gender, and Date of Birth (21/04/1990).