

Using the Paymentsshield General Insurance Integration via 360 Lifecycle

This guide is to show you how to activate the 'hand-off' integration with Paymentsshield for your General Insurance sourcing needs.

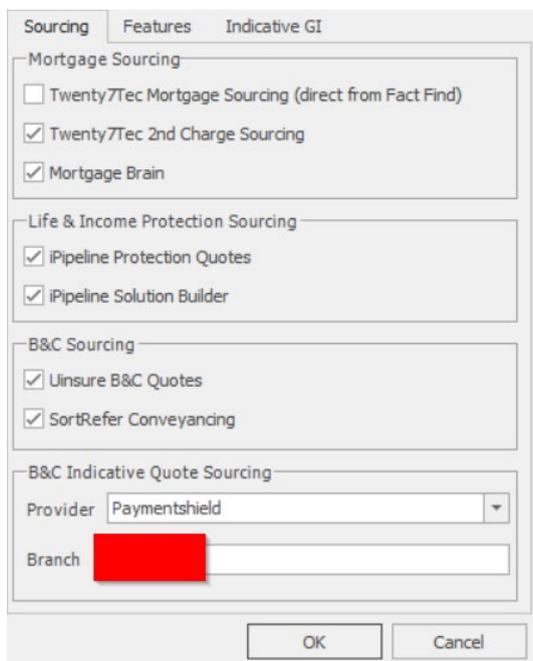
It will go through how to activate this for your firm, and as an individual user and how to use the integration via the online FactFind.

Firm Setup

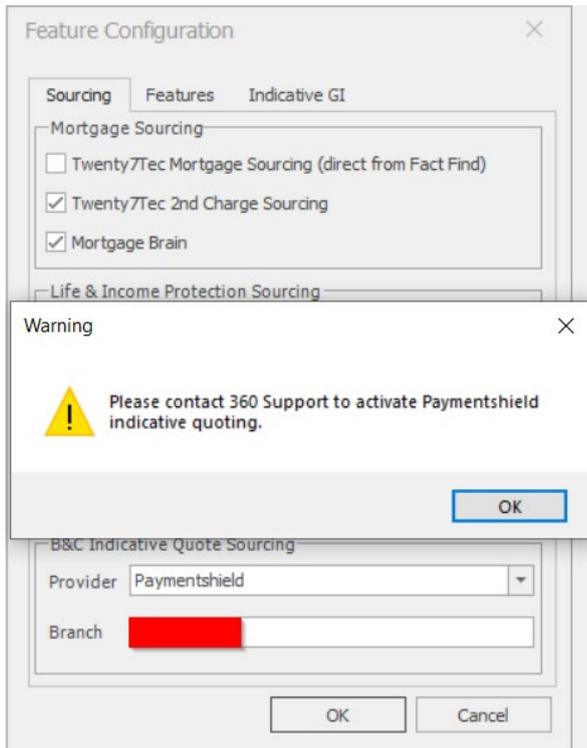
If your firm is already setup with the integration, then you will not need to follow this step, and can skip to the '**Individual Setup**' section of the guide (Page 5).

To setup your entire firm on the integration, please follow the below steps.

1. Login to 360 Office.
2. Select the 'Maintenance' Tab and click the 'General' Dropdown.
3. Navigate to 'Common Settings' and select 'Feature Configuration'.
4. Select the 'Sourcing' tab.



5. In the section titled "B&C Indicative Quote Sourcing" select Paymentsshield from the Provider dropdown.
6. Enter your Branch Number (this will need to be gathered from Paymentsshield directly).
7. Once filled in, click 'Ok' and you will see a completed screen like the below. This has now completed the Firm Setup.



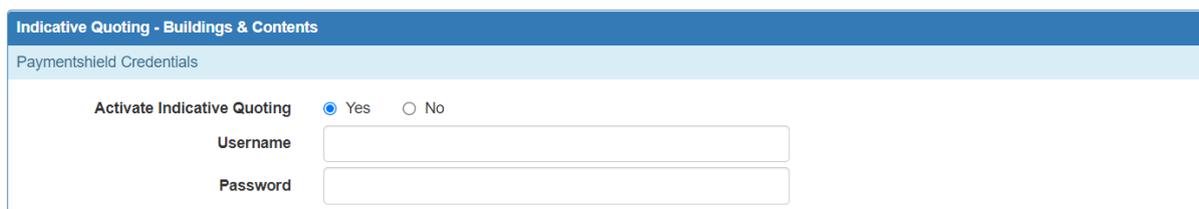
Please note, the 360 Lifecycle Support Team are required to activate the Paymentsshield sourcing before you can save your Branch Number. If this is yet to be done, when clicking “Ok” the below prompt will appear. You will need to contact them to enable this for your company.

Individual Setup

Once the previous step has been completed, you can go through the process of setting up any individual users who require access to the integration.

To do this, you will need to follow the steps below:

1. Login to the online FactFind.
2. Click the dropdown arrow on the right-hand side and select 'FactFind Settings'.
3. On this page, there will be a section called 'Indicative Quoting – Buildings & Contents – Paymentsshield Credentials' where you can input your Username and Password, as per the below.



The screenshot shows a web interface with a blue header 'Indicative Quoting - Buildings & Contents'. Below it is a section titled 'Paymentsshield Credentials'. It contains a label 'Activate Indicative Quoting' followed by radio buttons for 'Yes' (selected) and 'No'. Below this are two input fields: 'Username' and 'Password'.

4. When you enter this, upon entering your password a green button saying “Verify” will appear. Click this to save your credentials. If they have been entered incorrectly, an error message will appear notifying you of this. If they are correct, the system will advise you of this. Once these are entered, click “Save” at the bottom of the page and this will retain your credentials.

Note: to source for general insurance in the FactFind, you must have this enabled via your IDD settings. For more information on how to change these, please refer to our online FactFind Manual.

Indicative Quoting

In the settings screen, there is an option to “Activate Indicative Quoting”. This allows certain pages of the FactFind to provide indicative quotes based on the address details entered. These are enabled on the below pages as standard but can be amended to your preferences.

- Address History
- Properties
- Mortgage Requirements
- Mortgage Source
- Submission Sheet – New Mortgages

Indicative Quoting can be turned on or off at an individual user level but will be switched on by default when the integration is enabled. Turning this off will stop the estimated quotes appearing on the above pages but will also disable sourcing via PaymentsShield entirely for the specified user. It is recommended this continues to stay enabled as the Indicative Quote functionality can provide sizeable benefits when starting the GI conversation with a client.

Please note, the below details must be entered an indicative quote to be returned. Some of these if not entered will be assumed by PaymentsShield, which are marked with a *.

- Applicant1Title
- Applicant1Forename
- Applicant1Surname
- Applicant1DoB

- NoClaimsBuildings
- NoClaimsContents
- PropertyType*
- NumberOfBedrooms*
- BuildYear*
- InsuredAddressPostCode
- InsuredAddressStreet
- InsuredAddressDistrict
- InsuredAddressTown
- InsuredAddressCounty

How to access Paymentshield

As referenced in the Indicative Quoting section, the Paymentshield system can be accessed from any of the pages where this is enabled.

When you enter an address on one of these pages, a grey box will appear underneath this. Once the address has been verified, Paymentshield will return the indicative quote based on these details and show a monthly and yearly premium for the cheapest insurer. The below screenshots show how this looks before and after the validation from Paymentshield.

Client	<input type="text"/>
Address 1	<input type="text" value="6 Kings Court, Roughdown Road"/>
Address 2	<input type="text"/>
Town	<input type="text" value="Hemel Hempstead"/>
County	<input type="text" value="Hertfordshire"/>
Postcode	<input type="text" value="HP3"/> <input type="text" value="9AX"/>
	<div style="background-color: #cccccc; height: 40px; width: 100%;"></div>

Above: Indicative Quote section prior validation from Paymentsshield

Address 1	i	6 Kings Court, Roughdown Road	
Address 2	i		
Town	i	Hemel Hempstead	
County	i	Hertfordshire	
Postcode	i	HP3	9AX

Paymentsshield Indicative Quote

	Buildings & Contents	12 x payments of	or a single payment of
	View Quote	£17.41	£186.56

Above: Indicative Quote section upon validation from Paymentsshield

If you want to proceed into Paymentsshield’s system, click the “View Quote” hyperlink and this will open their platform in a new tab. This will pull key data across from what was entered into the FactFind to save you needing to re-key this. Where data has not been populated, assumptions have been made as per Paymentsshield’s system defaults. These defaults will appear in a pale green colour so you can differentiate between these.

Please note, anything updated in Paymentsshield will not feed back into 360’s FactFind.

Quoting via Paymentsshield

Once data has been entered and you have requested quotes, the relevant providers and products will appear. You can make all the standard amendments you would normally be able to do in Paymentsshield’s own system. If you want to bring any product(s) back into 360’s FactFind, select “Export Quote” and then click “Save & Quit” at the bottom of the page. This will close the Paymentsshield tab and re-direct you back into 360’s FactFind.



YOUR CHOSEN COVER LEVELS

 Buildings Cover £500,000

 Contents Cover £50,000

YOUR ALTERNATIVE COVER LEVELS

 Buildings Cover £1,000,000

 Contents Cover £75,000



£186.27

Annually | See breakdown

Buildings AD + £13.15

Contents AD + £21.41

Email Quote

Export Quote



£201.32

Annually | See breakdown

Buildings AD + £14.42

Contents AD + £23.52

Email Quote

Export Quote



£219.15

Annually | See breakdown

Buildings AD + £38.16

Contents AD + £11.78

Email Quote

Export Quote



£383.67

Annually | See breakdown

Buildings AD + £78.72

Contents AD + £19.19

Email Quote

Export Quote

Payment Method: Direct Debit Credit Card Debit Card ✓

Payment Frequency: ✓

EDIT QUOTE

SAVE & QUIT

Retrieving Products from Paymentshield

Once you are back in the FactFind, you will need to navigate to the Submission Sheet. At the bottom of this page, there will be a section titled “Paymentshield Indicative Quotes”, which to begin with will contain no data. Underneath this, there will be a button titled “Retrieve Quotes”. Clicking this will pull back the policy data and documents for the products you clicked to Export when in Paymentshield. This may take a minute depending on the number of products you are retrieving.

Once this is done, the table will refresh and be populated with the product data for those you selected, like the below.

Paymentshield Indicative Quotes										
Show	10	entries	Search:		Change columns					
Insurer	Defaqto Rating	Buildings Cover	Contents Cover	Unspecified Possessions Cover	Specified Possessions Cover	Buildings Excess	Contents Excess	Monthly Premium	Yearly Premium	
Apply	Axa	*****	£500,000	£50,000	£0	£0	£250	£250	£20.54	£220.02
Apply	Axa	*****	£500,000	£50,000	£0	£0	£250	£250	£17.39	£186.27

Showing 1 to 2 of 2 entries

Previous 1 Next

[Retrieve Quotes](#)

Once these are retrieved, you will need to select the “Chosen” button as you would do with all other types of policies, i.e., Mortgages, Life, Income Protection, etc. which can be found when clicking on the specific product. This will then map the relevant policy data into the “General Insurance” tab of the Submission Sheet. At this point you will be able to fill in any additional data before submitting the FactFind.

Apply/Retrieving Additional Details

On the left-hand side of these you can click the “Apply” button to continue with the application process for the relevant product. This will open Paymentshield in a new tab again and allow you to select Apply on the specific product you wish to continue with. Doing this at this stage will allow you to retrieve additional data back from Paymentshield, including additional documents on what was already provided. A breakdown of documents which are retrieved at each stage can be found below.

Document Name	Document Description
"Insurance Product Information Document"	Insurance Product Information Document
"Policy Booklet"	The policy booklet (Terms and Conditions)
"Quote Summary - Annual"	Summary of the quote (Price Summary)

"Quote Summary - Monthly"	Summary of the quote (Price Summary) for the 10-month payment plan
"Quote Summary - 9 Monthly Payment Option"	Summary of the quote (Price Summary) for the 9-month payment plan

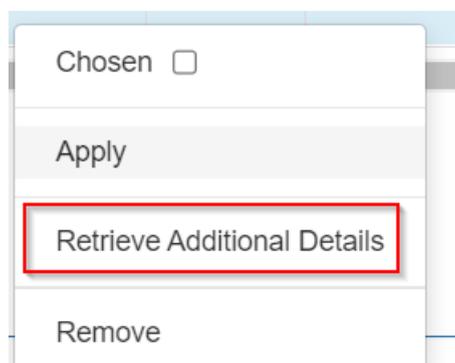
Above: documents retrieved after initial export

Document Name	Document Description
"IPID"	Insurance Product Information Document
"Terms"	The policy booklet (Terms and Conditions)
"Quote - Annual"	Summary of the quote (Price Summary)
"Quote - Monthly"	Summary of the quote (Price Summary) for the 10-month payment plan
"Quote - 9 Monthly Payment Option"	Summary of the quote (Price Summary) for the 9-month payment plan
"QAS"	Quote and application summary

Above: documents retrieved after the "Apply" process is done and "Retrieve Additional Details" is selected within the FactFind.

Please note, the commission will not pull back into 360's FactFind from Paymentsshield and will need to be entered to submit within 360. Also, if the application process is done after the FactFind has been submitted, the additional documents will need to be added manually.

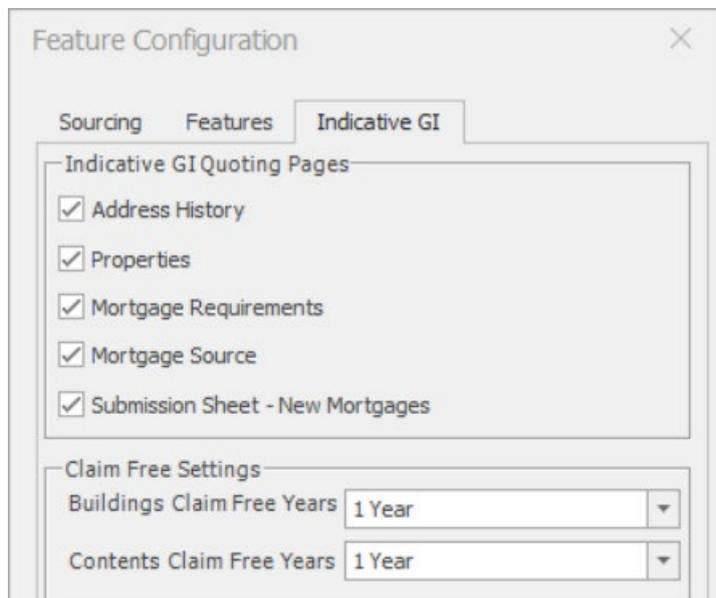
You can retrieve the additional details by clicking on the product in the table and selecting "Retrieve Additional Details" as highlighted below.



Integration Maintenance

Within the “Feature Configuration” screen referenced in the Firm Setup section of this guide, there is a tab for “Indicative GI”.

In here, you will be able to amend the pages of which the Indicative Quotes appear and amend the Claim Free settings that appear in Paymentshield. These are blank as standard and will adhere to Paymentshield’s default settings, but if you enter anything here it will override these.

A screenshot of the "Feature Configuration" window, specifically the "Indicative GI" tab. The window has a title bar with "Feature Configuration" and a close button. Below the title bar are three tabs: "Sourcing", "Features", and "Indicative GI". The "Indicative GI" tab is active. It contains two main sections: "Indicative GI Quoting Pages" and "Claim Free Settings". The "Indicative GI Quoting Pages" section has five checkboxes, all of which are checked: "Address History", "Properties", "Mortgage Requirements", "Mortgage Source", and "Submission Sheet - New Mortgages". The "Claim Free Settings" section has two dropdown menus: "Buildings Claim Free Years" and "Contents Claim Free Years", both set to "1 Year".

Please note, these settings are at a firm level, so cannot be amended from one specific user to another.

If you have any questions on the content of this guide, please contact the 360 Lifecycle Support Team on 0116 2408621 or via support@360lifecycle.co.uk