

How to split commission



Step 1:
Select the 'Policy' tab

1 Capture quote — 2 Accept quote — 3 Complete application — 4 Finalise

Policy Role players Benefits Proposal

POLICY DETAILS

Personal Insurance policy

Insured lives that screens gets LifeReturns® discounts.

Start date
2022/08/01

Frequency
Monthly

QUOTE PREPARED BY

FINANCIAL ADVISERS

+ Add adviser

Name	Broker house code	Financial adviser code	Marketing adviser code	Commission split %	Commission reference nr	Prepared by
				100		<input checked="" type="checkbox"/>

How to split commission

Step 2: Add adviser

1. Under the **'Policy'** tab, click on the **'+ Add adviser'** button.
2. Capture the *Broker house code*.
3. Capture the *Financial adviser code*.
4. Complete the *Commission split %*.
5. Click on **'Save and continue'**.

POLICY DETAILS

Personal Insurance policy

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Start date
2022/08/01

Frequency
Monthly

QUOTE PREPARED BY

FINANCIAL ADVISERS

1

+ Add adviser

Name	Broker house code	Financial adviser code	Marketing adviser code	Commission split %	Commission reference nr	Prepared by
				80		<input checked="" type="checkbox"/>
✗	2	3		20	4	<input type="checkbox"/>

Cancel

Save and continue

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