

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

POLICY DETAILS

Personal Insurance policy

Insured lives that screens gets LifeReturns® discounts.

Start date
2022/08/01

Frequency
Monthly

QUOTE PREPARED BY

[REDACTED]

FINANCIAL ADVISERS

1

+ 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'.

Name	Broker house code	Financial adviser code	Marketing adviser code	Commission split %	Commission reference nr	Prepared by
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	80	[REDACTED]	<input checked="" type="checkbox"/>

✗

2

3

20

4

Cancel

Save and continue

5