

Step 1: Select your required product and quote type

Step 2: Input your client details and benefit detail amounts.

Indexation

Yes No

Conversion

Yes No

Do Price Match?

Yes No

[Learn more](#)

+ Add Loadings

+ Profile & Other Details

Back Finish

To select the charging structure click **'Profile & Other Details'**

Other Details

Main Premium

Commission Profile

Yr1 100% (if escan)/20% /20% /20% /20% , 6% Renewal Yr6[6547]

Take Up

Introductory Commission

100 %

Renewal Commission

100 %

Save

This pop up box will open. Select the profile required from the drop down list. **Note: This will default to the most commonly used profile by product.**

The commission profile drop down will only allow you to select available profiles. (unavailable profiles will be greyed out. Eg if indexation chosen then non index profiles will be unavailable)

You can choose to alter the take up by changing the **'Introductory'** and **'Renewal'** commission fields

Once you have chosen the profile click **'Save'** to bring you back to the main input screen

Other Details

Main Premium

Commission Profile

Yr1 100% (if escan)/20% /20% /20% /20% , 6% Renewal Yr6[6547] ▼

Take Up

Introductory Commission

100

✓

%

Renewal Commission

90

✗

%

Main Premium Renewal takeup must be between 100% and 100%

Take up rates on certain products will require introductory and renewal to be the same. In this case a warning will appear.

If take up is reduced this will reduce the price and will be shown on the results screen and expressed as a 'Broker discount' in the report. This is to comply with Consumer protection Code

Execution - Epos

In you are going from quotes to Epos the commission chosen will prepopulate and cannot be edited in execution. This is to ensure that the customer gets the exact product terms quoted for. To change commission this must be done in MyQuotes prior to submission to execution.