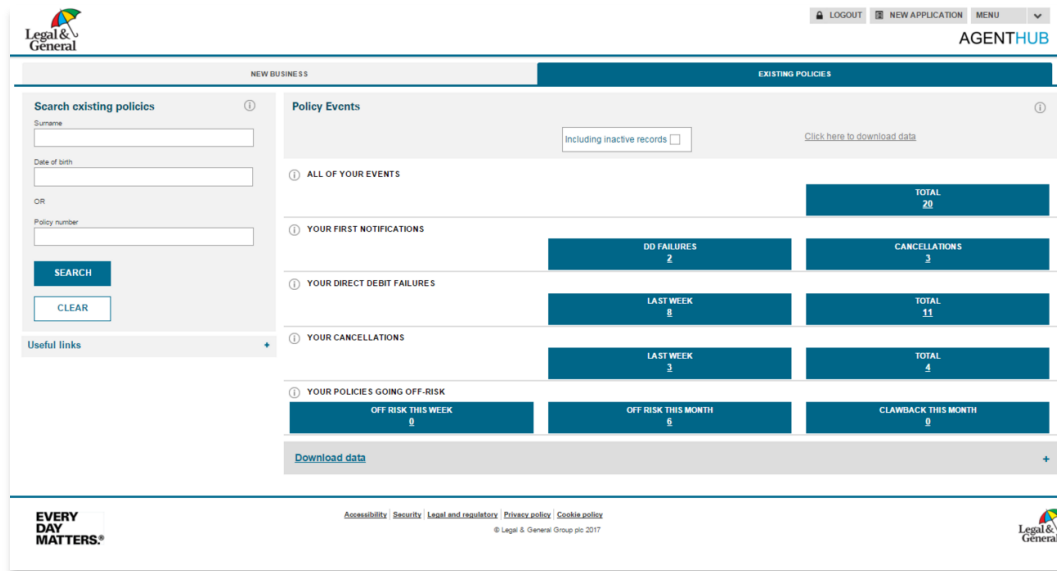


# Legal & General OLP Connect - Existing Business User guide.

**i** This is not a consumer advertisement.  
It is intended for Professional Financial Advisers and should  
not be relied upon by private customers or any other persons.





- ◀ 1
- ◀ 2
- ◀ 3
- ◀ 4
- ◀ 5

- 1 ▶ **All of your events**  
This shows all your cases where an event has taken place such as failed premium collection or a policy has cancelled
- 2 ▶ **Your first notifications**  
This show cases where the bank has informed us that their attempt to collect a premium has failed. At this stage we will not have written to your customer as the bank always makes a second attempt but it does give you early warning. The Cancellations button shows when your customer has notified us that they wish to cancel their policy.
- 3 ▶ **Your Direct Debit failures**  
This shows cases where the Direct Debit has been cancelled by your customer or where a second attempt at a collection has failed.
- 4 ▶ **Your Cancellations**  
This shows instances where your customer has notified us that they wish to cancel their policy.
- 5 ▶ **Your policies going off risk**  
This shows which policies are close to being cancelled as there has been no action taken by your customer.

AGENTHUB

NEW BUSINESS | EXISTING POLICIES

Search existing policies ⓘ

1. Search works for existing policies and is not limited to policy events  
 2. You can search using either Surname and Date of birth or Policy number  
 3. Search is not available on Surname or Date of birth only

Surname:

Date of birth:

OR

Policy number:

SEARCH

CLEAR

Useful links

Search results > Your Direct Debit Event > 1st Notification

Filter:

Policy number	Event created	Event type	Customer name(s)	Clawback due	Clawback	AgentFRM
0205497353	15/09/2017	Bounced DD	Sun-review-bao ,F	01/01/0001	0.00	5199997
0205273401	15/09/2017	Bounced DD	Yesyes ,N	01/01/0001	0.00	5199997

BACK

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## 6 ▶ Info icons

Clicking any of the info icons will display a brief description for the screen content it relates to.

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## 7 ▶ Search results

Here's an example of how the search results will look, with column headers varying depending on search or widget button used. Click a policy number to view the event details

The screenshot displays the AGENTHUB interface for an existing business policy (0205487853). The interface is organized into several sections:

- EVENT DETAILS - Bounced DD:** A table showing event details with columns for Event created, Event status, Cleared, Cleared date, and Policy type. Below this is a section for Reinstatement requirements with fields for Direct Debit instruction, Arrears amount, Declaration of health, and Premium details.
- NOTE HISTORY:** A section for recording notes, including a date, user (SYSTEM), and details (DD payment bounced - initial notification). It features a text input field and a 'SAVE' button.
- PRODUCT DETAILS - Increasing Family and Personal Income Plan:** A table with columns for Monthly benefit, Policy status, Policy start date, Policy end date, Monthly premium, and Collection day.
- Agent details:** A table listing agent information such as Name, Agent, Master agent, and Servicing agent.
- CONTACT DETAILS - Life insured:** A table containing personal information for the life insured, including Name, Address, Postcode, and Date of Birth.
- OTHER PRODUCTS:** A table listing other products associated with the policy, including Product number, Product name, and Lives assured.

Navigation arrows on the right side of the screenshot indicate the following sections are highlighted:

- 8
- 9
- 10
- 11

8 ▶ **Event details**

As there is an ongoing event you will see information regarding this event

9 ▶ **Note History**

Sometimes you will see notes that the system has produced. You also have the opportunity to write notes but these will not be visible to our customer service teams and are purely for your own use.

10 ▶ **Product details and contact details**

As you can see there is a wealth of information available including product and contact details as well as information on other products your customer may have.

11 ▶ **Other products**

If your customer has other Protection Products details will be shown here.