

# WEBSITE HELP GUIDE

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## About this guide

**We've teamed up with our adviser partners and experts in the field to bring you an updated and improved website that provides additional functionality and more options to quote and apply online.**

**This brief Help Guide gives you some insider tips on how to get the most out of our website.**

**If you have any questions call us on 01234 358344, e-mail us on [support@britishfriendly.com](mailto:support@britishfriendly.com) or have a look at our FAQ page.**

### Tip 1

Our new website is fully responsive so it will work on multiple devices, browsers and operating systems. For more information see the 'Website Accessibility' section in the footer of our website.

### Tip 2

Our online application is written so that it can be easily read to your client - for example, when we refer to 'Your Application' we mean your client's application.

### Tip 3

We've made it even easier to quote because you no longer need to login. We will now only ask you to login if you want to start an application.

### Tip 4

To access your saved quotes and applications, pending, in-force or cancelled policies click on the 'Login' button in the top right corner of our website. To access your documents and medical questionnaires - go to our 'My Documents' page and click on the 'My Documents' button and login.

### Tip 5

Your login details are the same for your online account, applications, 'my documents' and online apply because we know it's tough remembering so many passwords and pin numbers! If you ever do forget your login details, just call us on 01234 358 344 and we will help.

### Tip 6

Choose from our range of flexible application options:

- Telephone interview - choose the live online booking option with Morgan Ash or the option to request for British Friendly to arrange the booking.
- Online apply - you complete your client's medical details online.

### Tip 7

We've made our online apply as seamless as possible by creating an integrated process across our two systems. Our online apply is part of our second system, which is why you'll be prompted to login again if you choose to complete this option. If you choose to book a telephone interview these options can be completed within the first system.

### Tip 8

Our online apply is a separate system and can be accessed via the 'My Documents' page. You have the option to complete this stage of the application first before you complete the initial application (ie. contact details, direct debit, commission). Whichever order you do choose to complete the application, make sure you remember to finish and fully submit both or we will not be able to process your client's application.

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### Tip 9

If you choose to complete the 'online medical and lifestyle questionnaire' we will automatically require a GPR for your client if they exceed the following benefit levels:

Age	Benefit Level
18 to 40 inclusive	More than £600 per week
41 to 45 inclusive	More than £500 per week
46 to 50 inclusive	More than £400 per week
51 to 55 inclusive	More than £300 per week
56+	More than £250 per week

### Tip 10

We think it's best to leave application decisions to our underwriters who understand the needs of your clients most and ensure that your clients get the best possible outcomes. This is why, apart from 'fast track', our online application does not provide instant decisions. We think it's important that your clients are given a fair chance when making their application, so you can have peace of mind knowing that your client is getting excellent personal service.

### Tip 11

If you decide to book a telephone interview with Morgan Ash through our new live online booking system, all your client's application details will be automatically sent to Morgan Ash. When filling out your client's contact details in the online application form, make sure they give you the telephone number they want to be contacted on for their telephone interview.

### Tip 12

We believe it's important for your client to get the right amount of cover that's most suitable for their needs. So, with the click of a few buttons you can now easily amend your client's benefit amount throughout the initial application stages until they need to declare their income. If you wish to change the benefit amount after this point you will need to click 'back' to the income page.

### Tip 13

Our online application validates every page during completion, so if you click 'next' and the page scrolls back to the top that means there is some information missing. All missing information will appear in red - once completed click 'next' to move to the next section.

### Tip 14

For security purposes, our system will log you out of our website or an application if you've been idle for more than 15 minutes. You will receive a courtesy prompt after 10 minutes, however, to avoid losing any work, make sure you save your documents throughout the application process.

### Tip 15

We believe it's important to protect any sensitive information your client provides which is why we do not save or hold bank details until you have submitted your client's application.

### Tip 16

You can register as a new adviser during your first client application. If you're unregistered you will only have access to the telephone interview option booked by British Friendly as part of your first client application. After you've registered you can choose any application route subject to eligibility requirements.

### Tip 17

Visit our 'Contact Us' page or <https://advisers.britishfriendly.com/about-us/our-people> to find the specific contact for your individual queries.

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