

New Case Tracking

LifeQuote is proud to launch our new Case Tracking system.

We have listened to the feedback from advisers using the system and introduced some great functionality to give you greater access 24/7 from any device.

You will still have access to the same case information along with new features such as commission information, next actions and additional documents. You can now also search efficiently for categories of clients.

New features include:

- Full case history plus notifications of next actions
- Sort your requirements to simplify searches
- Confirmation of commission to be paid and date paid
- All cases are stored, so you can access past case information
- Post completion tracking with notifications of DDM cancellations and lapses
- Support Centre with FAQs and user guides
- Mobile responsive making it easier for you to access anywhere

Hi, E99004
[Log-out](#)

Summary

Applications in Progress

- PRE-SUBMISSION 1
- PIPELINE 0

Awaiting Start Date

- READY TO START 0

Policies at Risk

- AT RISK OF CANCELLATION 0

We hope the system is simpler to use but if you do require more information please visit the Support Centre or contact the Adviser Support Team on 01243 791199.

Best regards,
LifeQuote Team
21.03.2017