

## New Business customer journey transcript

In this video we're going to outline what a customer will see when a new application is submitted by an adviser.

Let's begin.

Once an application has been submitted the client will receive 2 emails. One confirming an application has been submitted on their behalf and a second with a temporary password.

Clicking the link in the first email will take them to a sign in page where the password from the second email can be entered.

The client will be asked to enter some additional details. Both for added security and ensure the adviser input the correct client details.

Clicking 'Next' takes the client through to the site where it confirms what they need to do. This includes viewing an application summary to ensure all details are correct, adding Direct Debit bank details required for a regular contribution where applicable, making a payment for a single contribution where applicable and registering for online access.

Clicking on 'Start' will pull through the application summary where you can see all the details; money going in, adviser charges being taken, and the bank details listed for regular contributions.

The client also has the option to print a summary of all the application details the adviser provided.

For regular contributions the client needs to confirm the bank details they want that money to be taken from.

The client doesn't need to sign or send anything to us, but they may want to keep this direct debit guarantee for their records.

If the client is paying a single contribution they'll land on this page. The page provides details on how to make the payment and the information shown is based on the payment method the client's adviser selected.

This is an example of a debit card payment but the client can change the method if they want to using the links here.

The amount the client needs to pay is shown here and this will include any initial adviser charge if they've agreed to pay this in addition to the single contribution.

As the client is paying by debit card, they can now enter their debit card details to make the payment. Clicking 'pay now' will request the payment from the client's bank account and complete the transaction.

Once payment has been made, they will get confirmation of the payment reference for the single contribution and confirmation that the regular contribution direct debit bank details matched what was on the application form.

As well as confirmation of next steps. The final button here allows the client to register online where they can then access their valuations and view any documentation.