In this video, we're going to show you how to complete a new business ISA application online. Let's begin.

First things first, you need to log in.

Next up, to start a new application click 'new application' on the left-hand side.

You will be taken to a starting page which gives you some details about the process and highlights anything that can't be completed online.

From here, click on start to begin the application.

You'll then be asked to fill in your client's details.

You don't need to complete all details at this stage but certain fields will need to be completed to progress. Any mandatory information required here, or when you try to submit the application, will be highlighted for completion.

Here you can use the postcode finder to enter a client's address to ensure the correct details are entered.

Your client's email address is always required and must be unique. As this is a paperless solution, clients are emailed a summary of the application once this has been submitted.

Bank details are requested upfront. Having verified bank details on file allows one-off and regular withdrawals to be processed quicker meaning your client gets their funds in their bank account sooner.

Once completed you'll move on to the money in section. From here you can 'add' transfers, single and regular contributions based on your client's needs.

When adding a transfer before you can confirm the action, you'll need to download the transfer authority form. The form has a unique reference number and will need to be signed by your client.

The unique reference number helps Link to identify the form with the client's record.

When adding a single contribution there are three payment methods. Visa debit and bank transfers are almost immediate processes, but for cheques it could take up to 2 working days for funds to clear.

Once all your client's information has been added and you've confirmed all the details are correct you will move on to the Adviser declaration.

As the set up of your client's Prudential ISA is a signatureless process, you'll need to review the information shown in each declaration and accept each in order to submit the application. Clicking Apply once all declarations are accepted will submit the application.

Clicking apply takes you through the application submitted screen. Here you can view the reference number for the application, details of what your client can expect and anything you still need to do. It also confirms the address to send any further information required for the application