Completing a Source Go Introduction

user guide

Source Learning & Development

#TrainToGain

1 Completing a Source Go Introduction

1. To start an introduction, access the **Source Go** portal:
   https://introducer.thesource.co.uk/

2. Enter your **Source Go Broker ID & Password** and click on **Continue**:

3. To create a new referral, select **Start a new introduction**:

4. The **introduction screen** is displayed:

5. Enter the **required information**:

Field	Input
Customer name	
Title	Select Title
First Name	Enter Client's First Name
Last name	Enter Client's Surname
Customer contact details	
Email address	Enter Client's email address
Mobile number	Enter Client's mobile number

6. Confirm that you have verified your client's identity, by selecting the **tick box**:

7. We strongly recommend that you complete the **Tell us more** section:

8. Enter the **required information**:

Field	Input
Address	
House number	Enter Client's House number
Postcode	Enter Client's Postcode
Customer date of birth	
Date of birth	Enter Client's date of birth

Action Note:

By providing this additional information, we will ensure that our introductory email to your client will include a provisional quote to encourage them to complete a full quotation.

9. After entering the clients' details, select **Generate Referral:**

Learning Note:

Selecting **Generate Referral** will automatically send the introduction email to your client.

10. Once the referral has been generated, it will appear in your **Source Go Dashboard**:

Your Cases

Start a new introduction

Quotes	Expiring	Introductions			
3	**0**	**2**	**0**	**1**	**0**
Quotes	Quotes	Unopened	Opened	Quoted	Live

Product	Client Name	Postcode	Status	Quote Expiry	
Buildings and Contents	Anne Other	NP10 0AW	⚫		Send reminder
Buildings and Contents	John Smith	NP19 0LQ	🟢	86 days	Send reminder
Buildings and Contents	John Smith	NP19 7SR	⚫	89 days	Send reminder

2 Tracking Your Source Go Introductions

1. You can track the progress of each introduction using the **Source Go Dashboard**:

2. **Your Cases** section:

Field	Information displayed	
Quotes	Displays the total number of your quotes that are currently active.	
Expiring	Displays the total number of your quotes that are due to expire within the next 14 days.	
Introductions		**Status**
Unopened	Displays the total number of introductions where the client has not accessed the quote.	Grey
Opened	Displays the total number of introductions where the client has accessed the quote, but not completed it.	Yellow
Quoted	Displays the total number of introductions where the client has completed a quote.	Green
Live	Displays the total number of introductions where the client has purchased a policy.	Teal

3. **Individual Introductions** section:

Product	Client Name	Postcode	Status	Quote Expiry	
Buildings and Contents	John Smith	NP19 0LQ	🟢	86 days	Send reminder
Buildings and Contents	John Smith	NP19 7SR	⚫	89 days	Send reminder
Buildings and Contents	Anne Other	NP10 0AW	🟡	89 days	Send reminder

- Within each individual introduction, you can view:
    - The Product
    - The Client's Name
    - The Client's Postcode
    - The Status of the introduction
    - The Date the quote expires

4. Where the quote is still awaiting action from your client, the **Send reminder** button will send the client a reminder email to encourage them to complete the quote and/or purchase of the policy:

Product	Client Name	Postcode	Status	Quote Expiry	
Buildings and Contents	John Smith	NP19 0LQ	🟢	86 days	Send reminder
Buildings and Contents	John Smith	NP19 7SR	⚫	89 days	Send reminder
Buildings and Contents	Anne Other	NP10 0AW	🟡	89 days	Send reminder

5. To find a **specific client**, enter their details in the **search field** at the top right of the screen. Any **matching introductions** will be displayed:

Source

Dave R Test | Logout

🔍 other

Your Cases

Start a new introduction

Quotes	Expiring	Introductions			
3	0	1	1	1	0
Quotes	Quotes	Unopened	Opened	Quoted	Live

Product	Client Name	Postcode	Status	Quote Expiry	
Buildings and Contents	Anne Other	NP10 0AW	🟡	89 days	Send reminder

Legend

Action Note:

This is to draw your attention to an action you **MUST** take in order to effectively use the system.

Learning Note:

This is to draw your attention to useful additional information that you may find interesting.

Caution Note:

This is to give you forewarning about an action that is **NOT** advisable or may have consequences that could impact on your effective use of the system.

Version Control

Version	Created	Author	Comments
1.0	Feb-2023	Dave Rees	Source Go Launch