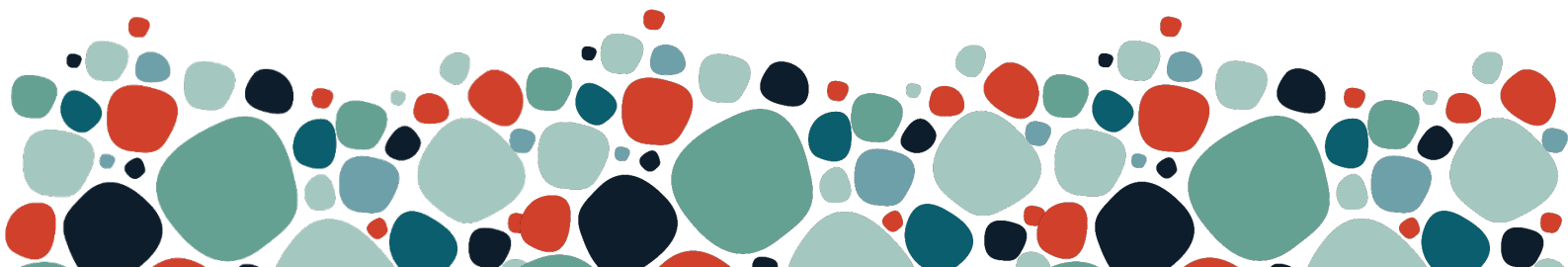


# Household Insurance Quote on The Source

## *user guide*

Source Learning & Development

*#TrainToGain*



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## 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:**

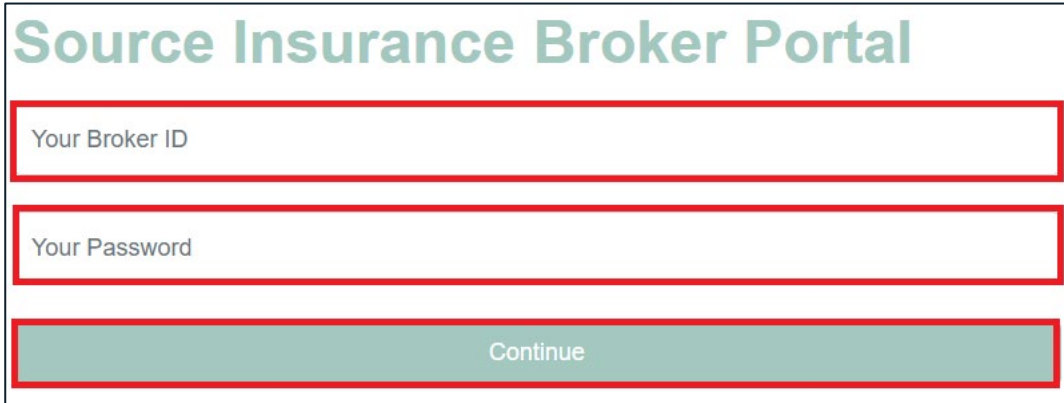
This is to give you forewarning about an action that is **NOT** advisable or may have consequences that could impact on your effective use of the system.

## Version Control

Version	Created	Author	Comments
4.0	Apr-2026	Dave Rees	New Question Set

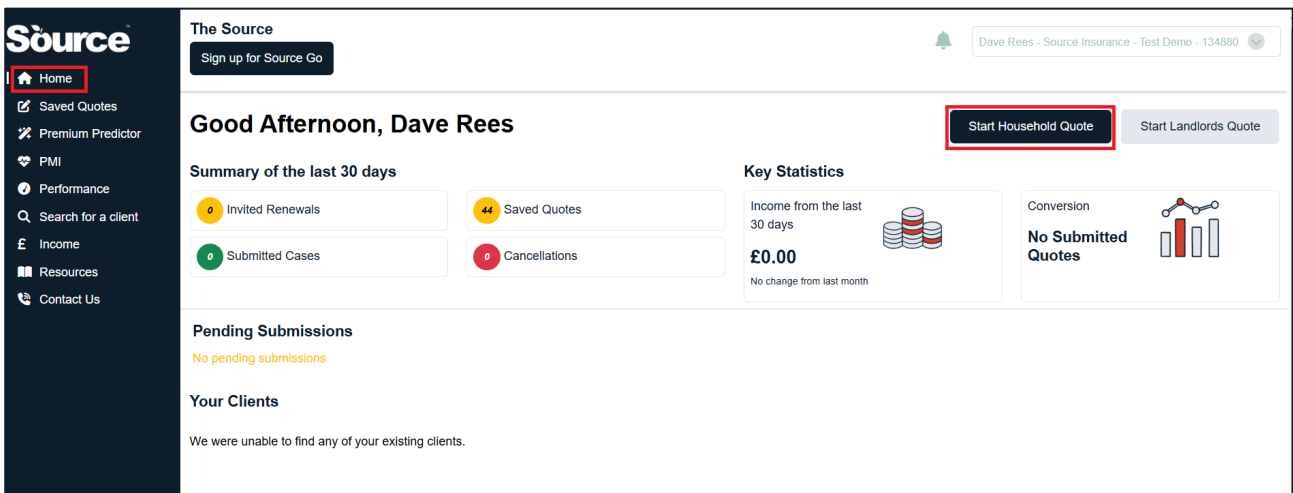
# 1 Accessing the Source Quote System

1. To start a quote, access **The Source Portal**: <https://broker.thesource.co.uk/>
2. Enter your **Broker ID** & **Password** and select **Continue**:



The screenshot shows the 'Source Insurance Broker Portal' login interface. It features three input fields, each outlined in red: a text field for 'Your Broker ID', a text field for 'Your Password', and a green 'Continue' button.

3. The **Home** screen is displayed. Select **Start Household Quote**:



The screenshot displays the 'The Source' Home dashboard for user Dave Rees. The dashboard includes a dark sidebar with navigation options like Home, Saved Quotes, and Performance. The main content area shows a 'Good Afternoon, Dave Rees' greeting, a 'Summary of the last 30 days' section with metrics for Invited Renewals (0), Submitted Cases (0), Saved Quotes (44), and Cancellations (0). It also features 'Key Statistics' showing 'Income from the last 30 days' as £0.00 and a 'Conversion' section indicating 'No Submitted Quotes'. A 'Start Household Quote' button is highlighted with a red box.

## 2 Person & Property Screen

**Source** Person & Property Build Quote Declarations Summary Start cover [Return to Dashboard](#)

### Property Details

What type of cover does your customer need?

**Buildings and Contents** Buildings Only Contents Only

Find address

Enter Postcode  **Find Address**

View address/Enter address manually

Type of property

Bedrooms  Year of build

Contents Sum Insured

No Claims Discount

Buildings  Contents

Claims or losses in the last 5 years

**Add Claim**

### Person Details

Title  First Name  Surname

Date of birth  Day  Month  Year  Occupation  Nature of business

Does your customer have a correspondence address that is different to the insured address?

Yes  No

Add another applicant

1. Confirm the cover required: **Buildings Only**, **Contents Only** or **Buildings and Contents**:

What type of cover does your customer need?

**Buildings and Contents** Buildings Only Contents Only

2. Enter the **postcode of the property** to be insured and select **Find address**:

Find address

**Find Address**

View address/Enter address manually

3. Select the **address of the property** to be insured:

1 Cornwall Road, Newport, NP19 7SR
2 Cornwall Road, Newport, NP19 7SR
3 Cornwall Road, Newport, NP19 7SR
4 Cornwall Road, Newport, NP19 7SR
5 Cornwall Road, Newport, NP19 7SR
6 Cornwall Road, Newport, NP19 7SR

4. On selection of the address of the property, the **Type of Property Insured, Number of Bedrooms, Year of Build** and **Rebuild Cost (Buildings Sum Insured)** fields will automatically populate based on the address selected:

**Your Address**

1 Cornwall Road, Newport, NP19 7SR [Change Address](#)

Please note: We automatically populate some of the property details. Please ensure the details below are correct, if they are not, please amend before proceeding with the quote.

**Type of property**

Semi-Detached House

**Bedrooms**  **Year of build**

**Rebuild Cost**

We have automatically calculated your buildings sum insured as **£311,000** using a calculator supplied by the Royal Institute of Chartered Surveyors (RICS). Please ensure this is accurate before proceeding. If you wish to change it, please [click here](#).



**Caution Note:**

The prepopulated details will need to be verified with the customer to confirm that they are accurate. The information can be amended manually if required.

**Action Note:**

In most cases, the Rebuild Cost (Buildings Sum Insured) value will be pre-populated using the Building Cost Information Service (BCIS) from RICS. In some cases, this is not available, so an amount must be entered manually.

**The client needs to confirm that the Rebuild Cost value is sufficient.**

To override the default value, **click on the link:**

**Rebuild Cost**

We have automatically calculated your buildings sum insured as **£311,000** using a calculator supplied by the Royal Institute of Chartered Surveyors (RICS). Please ensure this is accurate before proceeding. If you wish to change it, please [click here](#).

**Rebuild Cost**

[Calculate Rebuild Cost](#)



**Learning Note:**

If using the calculated **Rebuild Cost**, there is a disclaimer. To view the disclaimer, select the **question mark icon**

Bedroom-rated quotes can also be provided by entering 0 as the Rebuild Cost.

5. Confirm the **Contents Sum Insured**:

**Contents Sum Insured** ?

£35,000

6. The contents value is **defaulted to £35,000** based on the average value requested across the UK. **This figure can be amended as required.**

**Learning Note:**

Selecting the **question mark icon** ? provides an explanation of the Contents Sum Insured default amount.

Bedroom rated quotes can also be provided by entering 0 as the Contents Sum Insured.

7. Select the number of years **No Claims Discount** for **Buildings & Contents**:

**No Claims Discount**

Buildings Contents

8. If the customer has made a household claim in the last 5 years, select **Add a claim**:

**No Claims Discount**

Buildings Contents

Claims or losses in the last 5 years ?

**Add Claim**

9. Enter the **Claim details** and select **Save Claim**:

**Claims or losses in the last 5 years** ?

**Details of your claim**

Type of cover

**Buildings and Contents** Buildings Contents

Type of claim

Date of incident

dd/mm/yyyy

Was the claim on the property you are looking to insure? Yes No

Did the incident result in a claim payment? Yes No

Is the claim fully settled? Yes No

Cancel Claim **Save Claim**

10. Enter the required information for the **first applicant**:

Field	Input
Title	Select Title
First Name	Enter the Client's First Name
Surname	Enter the Client's Surname
Date of Birth	Enter the Client's Date of Birth

**Person Details**

Title <input type="text"/>	First Name <input type="text"/>	Surname <input type="text"/>
Date of birth Day <input type="text"/> Month <input type="text"/> Year <input type="text"/>	Occupation <input type="text" value="e.g. Teacher"/>	Nature of business <input type="text" value="e.g. Education"/>

11. To select the **Occupation**, start typing and then select the relevant job title from the list:

**Occupation**

- 
- Training Advisor
- Training Assistant
- Training Consultant
- Training Co-ordinator
- Training Instructor
- Training Officer

12. To select the **Nature of Business** start typing and then select the relevant option from the list:

**Nature of business**

- Insurance
- Insurance Advisor
- 
- Insurance Company
- Insurance Consultant



**Action Note:**

The **Occupation** and **Nature of Business** must be selected from the drop-down list, if the exact description does not appear on the list, select an option that is the closest match.

13. Confirm whether the applicant's **correspondence address** is different to the insured address:

Does your customer have a correspondence address that is different to the insured address?

Yes  No

14. If **No** is selected, move to **step 19**

15. If **Yes** is selected, additional fields will appear so that the **correspondence address** can be entered:

16. If a **non-UK correspondence address** is selected, a message will be displayed advising that we cannot offer cover:

17. For a **UK Correspondence Address**, enter the correspondence address **postcode** and select **Find Address**:

18. Select the **correspondence address** from the list:

19. If there is a **second applicant**, select the **plus** icon:

20. A further set of applicant detail questions will be displayed; **complete steps 10 - 12 for the second applicant:**

Joint applicant details

Title	First Name	Surname
<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of birth	Occupation	Nature of business
Day <input type="text"/> Month <input type="text"/> Year <input type="text"/>	<input type="text"/> e.g. Teacher	<input type="text"/> e.g. Education

21. To proceed, select **Next: Quote panel:**

**Person Details**

Title	First Name	Surname
<input type="text"/> Mr	<input type="text"/> John	<input type="text"/> Smith
Date of birth	Occupation	Nature of business
01 <input type="text"/> 01 <input type="text"/> 1970 <input type="text"/>	<input type="text"/> Training Manager	<input type="text"/> Insurance Broker

Does your customer have a correspondence address that is different to the insured address?

Add another applicant

## 3 Build Quote Screen

1. The **Build Quote** screen displays the quotations that are available from our panel of insurers:

**Source** Person & Property **Build Quote** Declarations Summary Start cover [Return to Dashboard](#)

**Your Options**

- Add high value belongings worth over £5,000 each to be covered in or away from home (0 item(s)) **Add**
- Add belongings worth less than £5,000 each to be covered away from home (ED Declared) **Add**
- Bicycle Cover (0 bicycle(s)) **Add**
- Would you like to add Accidental Damage cover for your buildings? **Yes** **No**
- Would you like to add Accidental Damage cover for your contents? **Yes** **No**
- Would you like to add Home Emergency Cover? **Yes** **No**

Total Buildings Excess: £500 Total Contents Excess: £500 **Legal cover is automatically included in our policies as standard.**

**Your quote**

Commission %: 20% [Show Commission](#)

<input type="checkbox"/>	<b>Covea Insurance plc. Source Home</b>	<b>£27.41</b> Monthly	<b>£293.66</b> Annually	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">More Info</a>	<b>Select</b>
<input type="checkbox"/>	<b>Allianz Source Home</b>	<b>£28.87</b> Monthly	<b>£309.30</b> Annually			<a href="#">More Info</a>	<b>Select</b>
<input type="checkbox"/>	<b>Integra Insurance Solutions Limited Source Home</b>	<b>£31.61</b> Monthly	<b>£338.70</b> Annually			<a href="#">More Info</a>	<b>Select</b>

[See more quotes](#)

[Looking for a previous quote? You can access previous versions of your quote by clicking here.](#)

[Back](#) [Compare Quotes](#) [Download Quote Summary](#) [Save Quote](#) [Share Quote](#) **Next: Declarations**

2. The results are displayed in **price order**, and the **best price is at the top and flagged** accordingly:

**Your quote**

Commission %: 20% [Show Commission](#)

<input type="checkbox"/>	<b>Covea Insurance plc. Source Home</b>	<b>£27.41</b> Monthly	<b>£293.66</b> Annually	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">More Info</a>	<b>Select</b>
<input type="checkbox"/>	<b>Allianz Source Home</b>	<b>£28.87</b> Monthly	<b>£309.30</b> Annually			<a href="#">More Info</a>	<b>Select</b>
<input type="checkbox"/>	<b>Integra Insurance Solutions Limited Source Home</b>	<b>£31.61</b> Monthly	<b>£338.70</b> Annually			<a href="#">More Info</a>	<b>Select</b>

[See more quotes](#)

[Looking for a previous quote? You can access previous versions of your quote by clicking here.](#)

[Back](#) [Compare Quotes](#) [Download Quote Summary](#) [Save Quote](#) [Share Quote](#) **Next: Declarations**

3. Any quotes that are **declined** are available to view at the bottom of the **Quote Screen**:

**Your quote**

Commission % Show Commission

20%

<input type="checkbox"/> Allianz <small>defacto</small>	<b>Allianz Source Home</b>	<b>£27.63</b> Monthly	<b>£295.99</b> Annually	✓ Auto-Selected	🏆 Best Price	More Info	Select
<input type="checkbox"/> PRESTIGE <small>defacto</small>	<b>Prestige Underwriting Services Ltd Source Home</b>	<b>£58.47</b> Monthly	<b>£626.46</b> Annually			More Info	Select
<input type="checkbox"/> COVEA <small>defacto</small>	<b>Covea Insurance plc Source Home</b> <small>Declined: Decline - DECLINE Area Buildings</small>						
<input type="checkbox"/> integra <small>defacto</small>	<b>Integra Insurance Solutions Limited Source Home</b> <small>Declined: Postcode area group for buildings cover (RA600) Postcode area group for contents cover (RA800)</small>						

4. **More Info** will show key cover limits and excesses for the chosen quote:

**Your quote**

Commission % Show Commission

20%

<input type="checkbox"/> COVEA <small>defacto</small>	<b>Covea Insurance plc Source Home</b>	<b>£27.41</b> Monthly	<b>£293.66</b> Annually	✓ Auto-Selected	🏆 Best Price	<b>More Info</b>	Select
<input type="checkbox"/> COVEA <small>defacto</small>	<b>Covea Insurance plc Source Home</b>	<b>£27.41</b> Monthly	<b>£293.66</b> Annually	✓ Auto-Selected	🏆 Best Price	Less Info	Select
Buildings Sum Insured	£1,000,000	Buildings Accidental Damage	✗	Total Buildings Excess	£500		
Contents Sum Insured	£100,000	Contents Accidental Damage	✗	Total Contents Excess	£500		
Valuables Limit	£30,000	Legal Cover	✓	Buildings Escape Of Water Excess	£850		
Trace & Access	£10,000			Buildings Subsidence Excess	£1,400		
				Contents Subsidence Excess	£500		

5. The **default cover levels** provided in the quote are as follows:

Cover	Selection/Value
Specified High Value Items	None
Unspecified Possessions	None
Bicycles	None
Buildings Accidental Damage	Not Selected
Contents Accidental Damage	Not Selected
Home Emergency Cover	Not Selected
Buildings Excess	£500
Contents Excess	£500

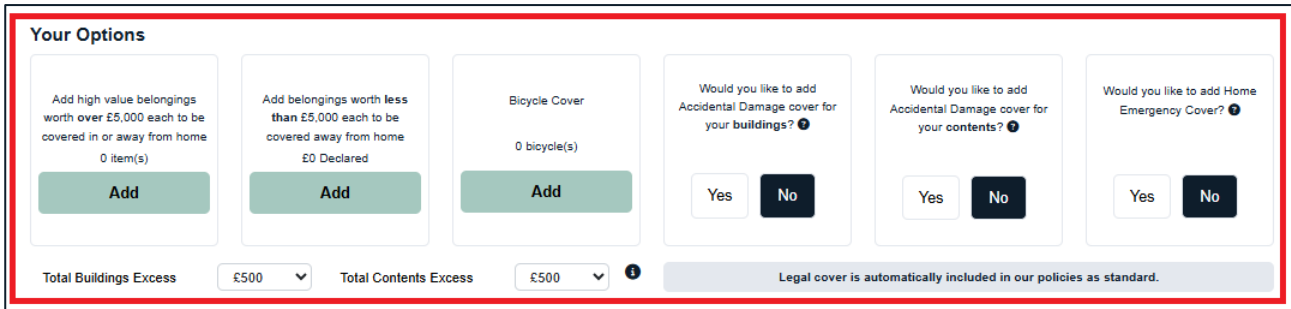
6. At the top of the results table, there are reminders that **Legal Cover is included as standard:**

**Your Options**

<p>Add high value belongings worth over £5,000 each to be covered in or away from home 0 item(s)</p> <p><b>Add</b></p>	<p>Add belongings worth less than £5,000 each to be covered away from home £0 Declared</p> <p><b>Add</b></p>	<p>Bicycle Cover 0 bicycle(s)</p> <p><b>Add</b></p>	<p>Would you like to add Accidental Damage cover for your buildings? ⓘ</p> <p>Yes No</p>	<p>Would you like to add Accidental Damage cover for your contents? ⓘ</p> <p>Yes No</p>	<p>Would you like to add Home Emergency Cover? ⓘ</p> <p>Yes No</p>
Total Buildings Excess <input type="text" value="£500"/>		Total Contents Excess <input type="text" value="£500"/>		<b>Legal cover is automatically included in our policies as standard.</b>	

### 3.1 Tailoring the Quote

1. The quote can be amended to suit the clients' needs, by using the **Your Options** menu at the top of the page:




#### Action Note:

After making any amendments in the Your Options section, the system will prompt users to **Update Quote**.



#### Learning Note:

There are three **Question Mark icons** available in the **Your Options** section:

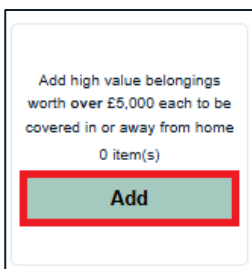
Buildings Accidental Damage Cover & Contents Accidental Damage Cover

- Provides an overview of what is included within the extended accidental damage cover for buildings/contents.

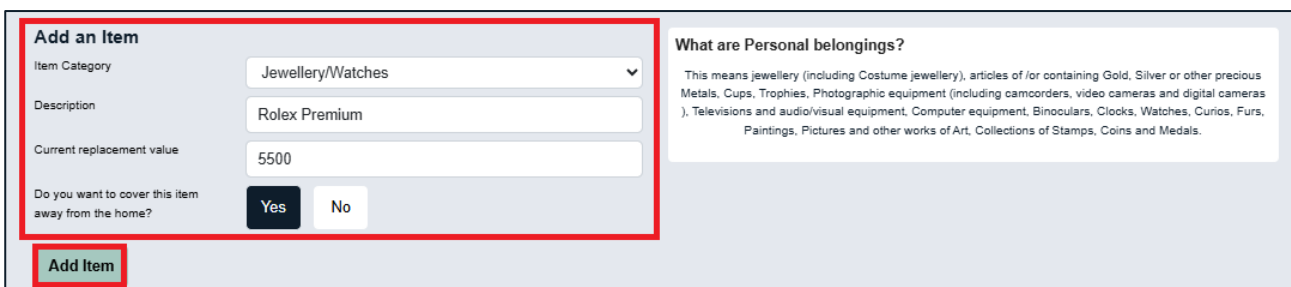
Home Emergency Cover

- Provides an overview of what is included within the Source Home Emergency Cover.

2. To add an **Item over £5,000**, select **Add**:



3. Enter all details of the **Item over £5,000**, then select **Add Item**:



4. If additional **Items over £5,000** need to be specified, repeat step 3:

**Add an Item**

Item Category:

Description:

Current replacement value:

Do you want to cover this item away from the home?  Yes  No

**Add Item**

**What are Personal belongings?**

This means jewellery (including Costume jewellery), articles of (or containing) Gold, Silver or other precious Metals, Cups, Trophies, Photographic equipment (including camcorders, video cameras and digital cameras), Televisions and audiovisual equipment, Computer equipment, Binoculars, Clocks, Watches, Curios, Furs, Paintings, Pictures and other works of Art, Collections of Stamps, Coins and Medals.

Jewellery/Watches  
Rolex Premium  
£5,500  
Covered away from home: Yes

5. To edit an existing item, select the **Edit Item** icon:

Jewellery/Watches  
Rolex Premium  
£5,500  
Covered away from home: Yes

6. To remove an item, select the **Delete** icon:

Jewellery/Watches  
Rolex Premium  
£5,500  
Covered away from home: Yes

7. To return to the **quote screen**, select the **Close** icon:

**Add an Item**

Item Category:

Description:

Current replacement value:

Do you want to cover this item away from the home?  Yes  No

**Add Item**

**What are Personal belongings?**

This means jewellery (including Costume jewellery), articles of (or containing) Gold, Silver or other precious Metals, Cups, Trophies, Photographic equipment (including camcorders, video cameras and digital cameras), Televisions and audiovisual equipment, Computer equipment, Binoculars, Clocks, Watches, Curios, Furs, Paintings, Pictures and other works of Art, Collections of Stamps, Coins and Medals.

Jewellery/Watches  
Rolex Premium  
£5,500  
Covered away from home: Yes

8. If **Unspecified Personal Belongings** (cover away from home) is required, select **Add**:

Add belongings worth less than £5,000 each to be covered away from home  
£0 Declared

**Add**



**Learning Note:**

Personal belongings are items such as mobile phones, tablets, laptops, cameras and jewellery.

9. Select the required **amount**, then select **Update**:

**Total value of unspecified belongings**

£2,000 ▼

**Update**

**What are unspecified belongings?**

These are also known as unspecified personal belongings and can include luggage, clothing, jewellery or spectacles; sports equipment; musical instruments; photographic equipment; mobile phones; laptops, computer equipment designed to be portable, portable audio/visual equipment; other items which are normally used, worn on or carried about the person.

Your value will be the total sum of belongings valued individually under £5000.

10. If **Bicycle** cover is required, select **Add**:

Bicycle Cover

0 bicycle(s)

**Add**

11. Enter the details of the **Bicycle**, including whether it is to be covered away from home, then select **Add Bicycle**:

**Add a Bicycle**

Bicycle Make: Boardman

Bicycle Model: Hybrid Sports Bike

Value: 3000

Do you want to cover this item away from the home?  Yes  No

**Add Bicycle**

**Bicycles**

Theft, accidental loss of or accidental damage to bicycles.

12. If an additional **Bicycle** needs to be entered, repeat step 11:

The screenshot shows a web interface for adding a bicycle. On the left, there is a form titled "Add a Bicycle" with the following fields: "Bicycle Make" (e.g. Boardman), "Bicycle Model" (e.g. URB 8.6 2022 - Hybrid Sports Bike), "Value" (£), and a question "Do you want to cover this item away from the home?" with "Yes" and "No" buttons. Below the form is a green "Add Bicycle" button. On the right, there is a "Bicycles" section with the text "Theft, accidental loss of or accidental damage to bicycles." Below this, a list of added bicycles is shown, with the first entry highlighted: "Boardman Hybrid Sports Bike", "£3,000", and "Covered away from home:Yes". A red box highlights the form fields and the "Add Bicycle" button.

13. To edit an existing bicycle, select the **Edit Item** icon:

The screenshot shows a single bicycle entry: "Boardman Hybrid Sports Bike", "£3,000", and "Covered away from home:Yes". In the top right corner, there are two icons: a trash can (Delete) and a pencil (Edit Item). A red box highlights the pencil icon.




14. To remove a bicycle, select the **Delete** icon:

The screenshot shows the same bicycle entry as in step 13. A red box highlights the trash can icon (Delete).




15. To return to the **quote screen**, select the **Close** icon:

The screenshot shows the full "Add a Bicycle" form and the "Bicycles" list. A red box highlights a close icon (an 'X' in a square) in the top right corner of the form area.




16. If **Buildings Accidental Damage Cover** is required, select **Yes**:

<p>Would you like to add Accidental Damage cover for your <b>buildings</b>? </p> <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>Would you like to add Accidental Damage cover for your <b>contents</b>? </p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>Would you like to add Home Emergency Cover? </p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
--	--	--

17. If **Contents Accidental Damage Cover** is required, select **Yes**:

<p>Would you like to add Accidental Damage cover for your <b>buildings</b>? </p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>Would you like to add Accidental Damage cover for your <b>contents</b>? </p> <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>Would you like to add Home Emergency Cover? </p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
---	---	--

18. If **Home Emergency Cover** is required, select **Yes**:

<p>Would you like to add Accidental Damage cover for your <b>buildings</b>? </p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>Would you like to add Accidental Damage cover for your <b>contents</b>? </p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>Would you like to add Home Emergency Cover? </p> <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</p>
---	--	---

#### Action Note:



Home Emergency is an additional extra which is designed to cover a sudden and unforeseen situation that needs to be dealt with quickly to stop further damage to the property.

It covers up to 1 hour labour, parts and materials up to a maximum of £500.



#### Caution Note:

If the property is **rented**, then Home Emergency Cover is **not available**.

In these cases, Home Emergency **should not** be selected.

19. Amend the **Buildings** and **Contents Excess** as required:

Total Buildings Excess	<input checked="" type="text" value="£500"/>	Total Contents Excess	<input checked="" type="text" value="£500"/>	
------------------------	--	-----------------------	--	---

20. After making amendments in the **Your Options** section, select **Update Quote**:

### Your quote

**Update required...**

You've made some changes to the policy requirements that mean we need to recalculate the price. When you're ready, click the Update Quote button to get an up to date price from our panel of leading insurers.

🔔 Don't worry, if you need to get back to a previous quote and price, you can access previous versions of your quote from the quote versions dashboard.

Cancel Changes **Update Quote**

21. To proceed, select **Next: Declarations**:

Person & Property
Build Quote
Declarations
Summary
Start cover

Return to Dashboard

### Your Options

Add high value belongings worth over £5,000 each to be covered in or away from home  
1 item(s)

Add

Add belongings worth less than £5,000 each to be covered away from home  
£2000 Declared

Add

Bicycle Cover  
1 bicycle(s)

Add

Would you like to add Accidental Damage cover for your buildings? 📌

Yes
No

Would you like to add Accidental Damage cover for your contents? 📌

Yes
No

Would you like to add Home Emergency Cover? 📌

Yes
No

Total Buildings Excess
£500
Total Contents Excess
£500
Legal cover is automatically included in our policies as standard.

### Your quote

Commission %

20%

Show Commission

<input type="checkbox"/>	Covea Insurance plc Source Home	<p><b>£40.85</b></p> <small>Monthly</small>	<p><b>£437.72</b></p> <small>Annually</small>	<p>✓</p> <small>Auto-Selected</small>	<p>🏆</p> <small>Best Price</small>	<span>More Info</span> <span style="background-color: #4CAF50; color: white; padding: 5px 10px;">Select</span>
<input type="checkbox"/>	Integra Insurance Solutions Limited Source Home	<p><b>£46.94</b></p> <small>Monthly</small>	<p><b>£502.94</b></p> <small>Annually</small>			<span>More Info</span> <span style="background-color: #4CAF50; color: white; padding: 5px 10px;">Select</span>
<input type="checkbox"/>	Prestige Underwriting Services Ltd Source Home	<p><b>£103.57</b></p> <small>Monthly</small>	<p><b>£1109.70</b></p> <small>Annually</small>			<span>More Info</span> <span style="background-color: #4CAF50; color: white; padding: 5px 10px;">Select</span>

See more quotes

Looking for a previous quote? You can access previous versions of your quote by clicking here.

Back
Compare Quotes
Download Quote Summary
Save Quote
Share Quote
**Next: Declarations**

### Caution Note:



If a quote is selected using the **Select** button, this will **'lock in'** that provider. If, after adjusting the quote or completing the declarations, a cheaper option is available, it **would not** be automatically selected. Similarly, if the chosen provider declines, then **no alternative** would be displayed. It is therefore recommended to proceed by using **the Auto-Select** default option.




## 3.2 Build Quote Screen Functions

### 3.2.1 Commission

1. The Commission Slider will change the **rate of commission** applied:

**Your quote**




Commission %  Show Commission

<input type="checkbox"/>	 Covea Insurance plc Source Home	<b>£40.85</b> Monthly	<b>£437.72</b> Annually	<input checked="" type="checkbox"/> Auto-Selected	 Best Price	<span>More Info</span> <span>Select</span>
<input type="checkbox"/>	 Integra Insurance Solutions Limited Source Home	<b>£46.94</b> Monthly	<b>£502.94</b> Annually			<span>More Info</span> <span>Select</span>

2. **% Show Commission** will display the commission earned on each policy:



**Your quote**

Commission %  Show Commission

<input type="checkbox"/>	 Covea Insurance plc Source Home	<b>£40.85</b> Monthly	<b>£437.72</b> Annually	<input checked="" type="checkbox"/> Auto-Selected	 Best Price	<span>More Info</span> <span>Select</span>
<input type="checkbox"/>	 Integra Insurance Solutions Limited Source Home	<b>£46.94</b> Monthly	<b>£502.94</b> Annually			<span>More Info</span> <span>Select</span>

**Your quote**

Commission %  Hide Commission





<input type="checkbox"/>	 Covea Insurance plc Source Home	<b>£40.85</b> Monthly	<b>£437.72</b> Annually	<b>£73.17</b> Commission	<input checked="" type="checkbox"/> Auto-Selected	<span>More Info</span> <span>Select</span>
<input type="checkbox"/>	 Integra Insurance Solutions Limited Source Home	<b>£46.94</b> Monthly	<b>£502.94</b> Annually	<b>£84.81</b> Commission		<span>More Info</span> <span>Select</span>

### 3.2.2 Save, Download and Version History

**Your quote**

Commission % Show Commission

20%

<input type="checkbox"/>	 Covea Insurance plc Source Home	£27.41 Monthly	£293.66 Annually	✓ Auto-Selected	 Best Price	More Info	Select
<input type="checkbox"/>	 Allianz Source Home	£28.87 Monthly	£309.30 Annually			More Info	Select
<input type="checkbox"/>	 Integra Insurance Solutions Limited Source Home	£31.61 Monthly	£338.70 Annually			More Info	Select

See more quotes

Looking for a previous quote? You can access previous versions of your quote by clicking here.





Back Compare Quotes Download Quote Summary Save Quote Share Quote Next: Declarations

#### 1. Selecting **Save Quote** will save the quotation

**Your quote**

Commission % Show Commission

20%

<input type="checkbox"/>	 Covea Insurance plc Source Home	£27.41 Monthly	£293.66 Annually	✓ Auto-Selected	 Best Price	More Info	Select
<input type="checkbox"/>	 Allianz Source Home	£28.87 Monthly	£309.30 Annually			More Info	Select
<input type="checkbox"/>	 Integra Insurance Solutions Limited Source Home	£31.61 Monthly	£338.70 Annually			More Info	Select

See more quotes

Looking for a previous quote? You can access previous versions of your quote by clicking here.

Back Compare Quotes Download Quote Summary Save Quote Share Quote Next: Declarations



#### Learning Note:

Once a quote is saved, it remains valid for 90 days from that date.

If any changes are made to the quote within that time period, then it may affect the premium.

## 2. Previous versions of the quote can be accessed via this link:

**Your quote**

Commission % Show Commission

20%

<input type="checkbox"/> Covea Insurance plc Source Home	£27.41 Monthly	£293.66 Annually	✓ Auto-Selected	🏆 Best Price	More Info	Select
<input type="checkbox"/> Allianz Source Home	£28.87 Monthly	£309.30 Annually			More Info	Select
<input type="checkbox"/> Integra Insurance Solutions Limited Source Home	£31.61 Monthly	£338.70 Annually			More Info	Select

See more quotes

Looking for a previous quote? You can access previous versions of your quote by clicking here.

Back Compare Quotes Download Quote Summary Save Quote Share Quote Next: Declarations

## Quote Versions for John Smith at NP19 7SR

Product	RC	BVEx	CSI	CVEx	HVB	UI	BC	AD/B	AD/C	HEC	LC	Updated	Annual Premium	Expiry	
0 Household: Buildings and Contents	£311,000	£400	£35,000	£400	0/£0.00	£0	0/£0.00	✗	✗	✗	✓	27/04/2026 12:07	£293.67	90 days	Use current version
1 Household: Buildings and Contents	£311,000	£400	£35,000	£400	1/£5,500.00	£2,000	1/£3,000.00	✓	✓	✓	✓	27/04/2026 12:07	£437.73	90 days	Use this version
2 Household: Buildings and Contents	£311,000	£400	£35,000	£400	0/£0.00	£0	0/£0.00	✗	✗	✗	✓	27/04/2026 11:58	£293.67	87 days	Use this version
3 Household: Buildings and Contents	£311,000	£400	£35,000	£400	0/£0.00	£0	0/£0.00	✗	✗	✗	✓	27/04/2026 11:19	£293.67	87 days	Use this version
4 Household: Buildings and Contents	£311,000	£400	£35,000	£400	0/£0.00	£0	0/£0.00	✗	✗	✗	✓	27/04/2026 11:19	£293.67	87 days	Use this version
5 Household: Buildings and Contents	£311,000	£400	£35,000	£400	0/£0.00	£0	0/£0.00	✗	✗	✗	✓	27/04/2026 11:19	£293.67	87 days	Use this version

## 3. Selecting Quote Summary will download a summary of the quote in PDF format:

**Your quote**

Commission % Show Commission

20%

<input type="checkbox"/> Covea Insurance plc Source Home	£27.41 Monthly	£293.66 Annually	✓ Auto-Selected	🏆 Best Price	More Info	Select
<input type="checkbox"/> Allianz Source Home	£28.87 Monthly	£309.30 Annually			More Info	Select
<input type="checkbox"/> Integra Insurance Solutions Limited Source Home	£31.61 Monthly	£338.70 Annually			More Info	Select

See more quotes

Looking for a previous quote? You can access previous versions of your quote by clicking here.

Back Compare Quotes Download Quote Summary Save Quote Share Quote Next: Declarations



## Your Quote Summary

(For Intermediary Use Only)

Quote date: 02/01/2026  
 - premiums guaranteed until: 30/03/2026.  
 (Provided that no details have been changed and the quote has been saved)

Prepared by: Mr Dave Rees  
 On behalf of: Source Insurance - Test Demo  
 Quote created for: Mr John Smith

### Applicant Details

#### 1st Proposer

Date of birth: 01/01/1970  
 Occupation: Training Manager  
 Nature of business: Insurance Broker

#### 2nd Proposer

Date of birth:  
 Occupation:  
 Nature of business:

### Property Details

### 3.2.3 Share Quote

The **Share quote** function allows brokers to share the quote with their clients.

#### Your quote

Commission % Show Commission

<input type="checkbox"/>	Covea Insurance plc Source Home	£27.41 Monthly	£293.66 Annually	<input checked="" type="checkbox"/>		More Info	Select
<input type="checkbox"/>	Allianz Source Home	£28.87 Monthly	£309.30 Annually			More Info	Select
<input type="checkbox"/>	Integra Insurance Solutions Limited Source Home	£31.61 Monthly	£338.70 Annually			More Info	Select

See more quotes

Looking for a previous quote? You can access previous versions of your quote by clicking here.

## 4 Declarations Screen

1. The **Declaration screens** display all the declarations made regarding the applicant and the property that is to be insured.

**Learning Note:**

When you complete a quote in our quotation system, you are entering the details on your client's behalf.

Therefore, you need to ensure that:

- You ask the client the declarations as worded on the quote screen.
- The client answers all the questions reasonably and honestly.
- You do not speculate or estimate any response.

**Caution Note:**

**Remember, you are acting on behalf of your client, so if you fail to disclose or misrepresent your client, then the insurer may cancel the policy or refuse to pay a claim.**

**Action Note:**

You should advise your client that if any renovation or construction work is carried out at the property in the future, it is important to inform Source so that it can be noted on the policy.

Failure to notify the insurer of any renovation or construction work may invalidate any potential claims.

## 4.1 Declarations Preference is set as 'Show all declarations'



### Learning Note:

This screen is displayed when the Declarations preference is set as:  
**Show all declarations.**

**Source**

Person & Property ✓ Build Quote ✓ **Declarations** Summary Start cover

**Declarations**

**Applicant**

- No-one at the property has been declared bankrupt or been subject to an Individual Voluntary Agreement (IVA) or County Court Judgement (CCJ)
- No-one residing at the property has had insurance cancelled, turned down or had any special terms imposed
- No-one residing at the property has ever been convicted, cautioned or charged but not yet tried with any criminal offence other than motoring offences

**Property**

- The property is your main residence and it is occupied
- You and your immediate family live at the property
- The property is usually occupied at night and unoccupied during the day
- The property is not used for trade, business or professional purposes
- The property is in a condition in which it could be lived in
- The property has brick walls and a pitched roof with no flat area
- The property is not a listed building
- The property is not undergoing construction or renovation works in the next 12 months

**Flooding & Subsidence**

- The property has never been flooded and is not within a 400 metre radius with a history of flooding
- The property has never suffered damage from subsidence, heave or landslip or shown signs of damage by such causes - e.g. cracking or bulging of the walls

Back

Return to Dashboard

**Broker Declaration**

I confirm that I have read all questions to the proposer and they have answered them to the best of their knowledge and belief.

Agree and Proceed

Disagree and Edit

Share Quote

- If your client agrees that the statements are correct, select **Agree and Proceed** and move to **Section 5**:

**Broker Declaration**

I confirm that I have read all questions to the proposer and they have answered them to the best of their knowledge and belief.

Agree and Proceed

Disagree and Edit

Share Quote

- If any statement is incorrect, select **Disagree and Edit** and move to **Section 4.2**:

**Broker Declaration**

I confirm that I have read all questions to the proposer and they have answered them to the best of their knowledge and belief.

Agree and Proceed

Disagree and Edit

Share Quote

## 4.2 Declarations Preference is set as 'Show declarations step by step'



### Learning Note:

This screen is displayed when the Declarations preference is set as:

**Show declarations step by step.**


OR

When **Disagree and Edit** is selected from the full list of declarations (where the declaration preference is set to Show all declarations)


1. The declarations are split into three separate sections: **About You, Property and Flooding & Subsidence:**

**Source** Person & Property Build Quote **Declarations** Summary Start cover [Return to Dashboard](#)


### Declarations



**About You**



**Property**



**Flooding & Subsidence**

**Is this information correct?**

Source have based these details on answers from over 90% of users. If something isn't correct, select 'No' to make a change.

**Source think:**

- No-one at the property has been declared bankrupt or been subject to an Individual Voluntary Agreement (IVA) or County Court Judgement (CCJ)
- No-one residing at the property has had insurance cancelled, turned down or had any special terms imposed
- No-one residing at the property has ever been convicted, cautioned or charged but not yet tried with any criminal offence other than motoring offences

**Yes - These are correct**

**No - These are not correct**

## 4.2.1 About You Screen

- The **About You** screen displays all the **Declarations** relating to the individuals to be named on the policy:

**Source** Person & Property ✓ Build Quote ✓ **Declarations** ● Summary Start cover [Return to Dashboard](#)

### Declarations

**About You** Property Flooding & Subsidence

**Is this information correct?**

Source have based these details on answers from over 90% of users. If something isn't correct, select 'No' to make a change.

**Source think:**

- No-one at the property has been declared bankrupt or been subject to an Individual Voluntary Agreement (IVA) or County Court Judgement (CCJ)
- No-one residing at the property has had insurance cancelled, turned down or had any special terms imposed
- No-one residing at the property has ever been convicted, cautioned or charged but not yet tried with any criminal offence other than motoring offences

**Yes - These are correct** **No - These are not correct**

- If your client agrees that the statements are correct, select **Yes - These are correct** and move to **Section 4.2.2:**

**About You** Property Flooding & Subsidence

**Is this information correct?**

Source have based these details on answers from over 90% of users. If something isn't correct, select 'No' to make a change.

**Source think:**

- No-one at the property has been declared bankrupt or been subject to an Individual Voluntary Agreement (IVA) or County Court Judgement (CCJ)
- No-one residing at the property has had insurance cancelled, turned down or had any special terms imposed
- No-one residing at the property has ever been convicted, cautioned or charged but not yet tried with any criminal offence other than motoring offences

**Yes - These are correct** **No - These are not correct**

- If any statement is incorrect, select **No - These are not correct:**

**About You** Property Flooding & Subsidence

**Is this information correct?**

Source have based these details on answers from over 90% of users. If something isn't correct, select 'No' to make a change.


**Source think:**

- No-one at the property has been declared bankrupt or been subject to an Individual Voluntary Agreement (IVA) or County Court Judgement (CCJ)
- No-one residing at the property has had insurance cancelled, turned down or had any special terms imposed
- No-one residing at the property has ever been convicted, cautioned or charged but not yet tried with any criminal offence other than motoring offences


**Yes - These are correct** **No - These are not correct**

5. Amend the questions as required:


### Declarations



**About You**



**Property**



**Flooding & Subsidence**

Have you or anyone living in your home been declared bankrupt or been the subject of an Individual Voluntary Agreement (IVA) or County Court Judgement (CCJ)?

Have you or anyone living in your home had any insurance cancelled, turned down or had any special terms imposed?

Have you or anyone living in your home ever been convicted, cautioned or charged but not yet tried with any criminal offence other than motoring offences?

**Please note:** Only non-spent convictions need to be disclosed, please refer to the following tables for reference. Please click [here](#) for a definition of a conviction.

Yes	No
Yes	No
Yes	No



**Learning Note:**

Selecting the **Question Mark Icon** displays additional details about that particular question.

6. Certain questions may require additional questions to be answered\*:

Have you or anyone living in your home been declared bankrupt or been the subject of an Individual Voluntary Agreement (IVA) or County Court Judgement (CCJ)? Yes No

Have you or anyone living in your home been declared bankrupt? Yes No

Have you or anyone living in your home been the subject of an Individual Voluntary Agreement (IVA)? Yes No

Have you or anyone living in your home had any County Court Judgements (CCJs)? Yes No

Have you or anyone living in your home had any insurance cancelled, turned down or had any special terms imposed? Yes No

Have you or anyone living in your home ever been convicted, cautioned or charged but not yet tried with any criminal offence other than motoring offences? Yes No

**Please note:** Only non-spent convictions need to be disclosed, please refer to the following tables for reference. Please click [here](#) for a definition of a conviction.

7. After **amending** the required questions, select **Next: Property:**

Have you or anyone living in your home ever been convicted, cautioned or charged but not yet tried with any criminal offence other than motoring offences? Yes No


**Please note:** Only non-spent convictions need to be disclosed, please refer to the following tables for reference. Please click [here](#) for a definition of a conviction.


Back
Save Quote Next: Property


## 4.2.2 Property Screen

1. The **Property screen** displays all the **Declarations** relating to the property that is to be insured:

### Declarations

 About You

 Property

 Flooding & Subsidence

**Is this information correct?**


Source have based these details on answers from over 90% of users. If something isn't correct, select 'No' to make a change.


**Source think:**


- The property is your main residence and it is occupied
- You and your immediate family live at the property
- The property is usually occupied at night and unoccupied during the day
- The property is **not** used for trade, business or professional purposes
- The property is in a condition in which it could be lived in
- The property has brick walls and a pitched roof with no flat area
- The property is not a listed building
- The property is **not** undergoing construction or renovation works in the next 12 months

2. If your client agrees that the statements are correct, select **Yes - These are correct** and move to **Section 5.1.3:**

### Declarations

 About You

 Property

 Flooding & Subsidence

**Is this information correct?**


Source have based these details on answers from over 90% of users. If something isn't correct, select 'No' to make a change.

**Source think:**


- The property is your main residence and it is occupied
- You and your immediate family live at the property
- The property is usually occupied at night and unoccupied during the day
- The property is **not** used for trade, business or professional purposes
- The property is in a condition in which it could be lived in
- The property has brick walls and a pitched roof with no flat area
- The property is not a listed building
- The property is **not** undergoing construction or renovation works in the next 12 months

3. If any statement is incorrect, select **No - These are not correct**:


### Declarations



About You



Property



Flooding & Subsidence

**Is this information correct?**

Source have based these details on answers from over 90% of users. If something isn't correct, select 'No' to make a change.


**Source think:**

- The property is your main residence and it is occupied
- You and your immediate family live at the property
- The property is usually occupied at night and unoccupied during the day
- The property is **not** used for trade, business or professional purposes
- The property is in a condition in which it could be lived in
- The property has brick walls and a pitched roof with no flat area
- The property is not a listed building
- The property is **not** undergoing construction or renovation works in the next 12 months


Yes - These are correct

No - These are not correct


4. Amend the questions as required:



About You



Property



Flooding & Subsidence

### Occupancy

Is your home: Your main residence & Occupied ▾

Is your home used for trade, business or professional purposes? ⓘ Yes No

Is your home in a condition in which it could be lived in? ⓘ Yes No

Does your home have brick walls and a pitched tiled roof with no flat area? Yes No

Is your home a listed building? Yes No

Is your home undergoing construction or renovation or any works planned in the next 12 months? ⓘ Yes No



#### Learning Note:

Selecting the **Question Mark Icon** displays additional details about that particular question.

5. Certain questions may require additional questions to be answered:

Is your home used for trade, business or professional purposes?  Yes  No

Type of business use?  Select an option:

Type of work?  Select an option:

6. After **amending** the required questions, select **Next: Flooding & Subsidence**:


Is your home a listed building?  Yes  No

Is your home undergoing construction or renovation or any works planned in the next 12 months?  Yes  No


### 4.2.3 Flooding & Subsidence Screen

1. The **Flooding & Subsidence screen** displays all the **Declarations** relating to the flooding & subsidence history of the property that is to be insured:


#### Declarations



About You



Property



Flooding & Subsidence

**Is this information correct?**

Source have based these details on answers from over 90% of users. If something isn't correct, select 'No' to make a change.

**Source think:**


- The property has never been flooded and is not within a 400 metre radius with a history of flooding
- The property has never suffered damage from subsidence, heave or landslip or shown signs of damage by such causes - e.g. cracking or bulging of the walls

Yes - These are correct


No - These are not correct

2. If your client agrees that the statements are correct, select **Yes - These are correct** and move to **Section 6**:


#### Declarations



About You



Property



Flooding & Subsidence

**Is this information correct?**

Source have based these details on answers from over 90% of users. If something isn't correct, select 'No' to make a change.

**Source think:**


- The property has never been flooded and is not within a 400 metre radius with a history of flooding
- The property has never suffered damage from subsidence, heave or landslip or shown signs of damage by such causes - e.g. cracking or bulging of the walls

Yes - These are correct


No - These are not correct

3. If any statement is incorrect, select **No - These are not correct**:


#### Declarations



About You



Property



Flooding & Subsidence

**Is this information correct?**

Source have based these details on answers from over 90% of users. If something isn't correct, select 'No' to make a change.

**Source think:**


- The property has never been flooded and is not within a 400 metre radius with a history of flooding
- The property has never suffered damage from subsidence, heave or landslip or shown signs of damage by such causes - e.g. cracking or bulging of the walls


Yes - These are correct


No - These are not correct

4. Amend the questions as required:

### Declarations

  
**About You**

  
**Property**

  
**Flooding & Subsidence**

Has your home ever been flooded or in an area (within a 400 metre radius) with a history of flooding? Yes

Has your home ever suffered damage by subsidence, heave or landslip or show signs of damage by such causes e.g. cracking or bulging of the walls? Yes



#### Learning Note:

Selecting the **Question Mark Icon** displays additional details about that particular question.

5. Certain questions may require additional questions to be answered:

Has your home ever been flooded or in an area (within a 400 metre radius) with a history of flooding? Yes

Is your home in an area (within 400 metre radius) with a history of flooding? Yes

Has your home including its outbuildings and grounds ever been flooded regardless of whether any damage was caused, or a claim made? Yes

Has your home ever suffered damage by subsidence, heave or landslip or show signs of damage by such causes e.g. cracking or bulging of the walls? Yes

6. After **amending** the required questions, select **Next: Your final quote**:

Has your home ever been flooded or in an area (within a 400 metre radius) with a history of flooding? Yes

Has your home ever suffered damage by subsidence, heave or landslip or show signs of damage by such causes e.g. cracking or bulging of the walls? Yes

## 5 Quote Summary Screen

1. The **Summary** Screen is displayed:

**Source** Person & Property Build Quote Declarations **Summary** Start cover Return to Dashboard

### Insurance Summary for John Smith

**Covea Insurance plc Source Home** **£31.67** **£339.35**  
Monthly Annually  
Auto-Selected Best Price More Info **Select**

See more quotes

Commission % 20% Show Commission

**Additional cover**  
Accidental Damage Buildings  
Home Emergency Cover

**Standard cover limits**  
Buildings Cover £1,000,000  
Contents Cover £100,000  
Valuables Limit £30,000  
Valuables Single Article Limit £5,000  
Show more

**Excesses**  
Buildings Excess £500  
Buildings Accidental Damage Excess £500  
Contents Excess £500  
Show more

Endorsements 0 Conditions 0 Adjustments 0 Additional Information 3

There are no endorsements for this policy.

2. The selected policy may have changed depending on the answers given in the declarations:

**Source** Person & Property Build Quote Declarations **Summary** Start cover Return to Dashboard

### Insurance Summary for John Smith

**Covea Insurance plc Source Home** **£31.67** **£339.35**  
Monthly Annually  
Auto-Selected Best Price More Info **Select**

See more quotes

3. To see any alternative quotes, select **See more quotes**:

**Source** Person & Property Build Quote Declarations **Summary** Start cover Return to Dashboard

### Insurance Summary for John Smith


**Covea Insurance plc Source Home** **£31.67** **£339.35**  
Monthly Annually  
Auto-Selected Best Price More Info **Select**

See more quotes

4. A summary of the product features is displayed; it is important to draw the client's attention to any **Additional cover** selected, **Standard cover limits** and **Excesses**:

Additional cover	Standard cover limits	Excesses
 Accidental Damage Buildings  Home Emergency Cover	<b>Buildings Cover</b> £1,000,000  <b>Contents Cover</b> £100,000  <b>Valuables Limit</b> £30,000  <b>Valuables Single Article Limit</b> £5,000 Show more	<b>Buildings Excess</b> £500  <b>Buildings Accidental Damage Excess</b> £500  <b>Contents Excess</b> £500 Show more

5. Additional details can be viewed by selecting **Show more**:

Additional cover	Standard cover limits	Excesses
 Accidental Damage Buildings  Home Emergency Cover	<b>Buildings Cover</b> £1,000,000  <b>Contents Cover</b> £100,000  <b>Valuables Limit</b> £30,000  <b>Valuables Single Article Limit</b> £5,000 Show more	<b>Buildings Excess</b> £500  <b>Buildings Accidental Damage Excess</b> £500  <b>Contents Excess</b> £500 Show more

6. Any **Endorsements, Conditions, Adjustments and Additional Information** that are applicable to the policy are outlined:

> Endorsements	0	> Conditions	0	> Adjustments	0	> Additional Information	3
----------------	---	--------------	---	---------------	---	--------------------------	---

There are no endorsements for this policy.

7. To view any **Endorsements, Conditions, Adjustments and Additional Information** that is applicable, select the relevant heading:

> Endorsements	0	> Conditions	0	> Adjustments	0	> Additional Information	3
----------------	---	--------------	---	---------------	---	--------------------------	---

The insurer's engine was called requesting buildings cover using the sum insured supplied.

The insurer's engine was called requesting contents cover using the sum insured supplied.

It is your responsibility to provide an accurate rebuilding sum insured for the home to be covered by this policy. Please note that if you did not enter the rebuild cost yourself, Source bears no liability for the rebuilding cost estimate provided by BCIS.



**Learning Note:**

An endorsement is an amendment to an insurance policy that usually restricts or excludes cover.

8. In order to proceed and generate the **Pre-Sale Documents**, enter the customer's **telephone number** and **email address**, then select **Update**:

**Confirm customer details**

You have not entered the contact telephone and email address for this customer. You must enter these now to continue.

**Telephone**

**Email**

You will not be able to generate documentation and proceed with this quote until you complete the telephone number and email fields

9. Pre-sale documents (**Quotation Summary, Compliance Document, IPIDs and Letter of Intent**) are available to download by selecting the download button:

What service have you provided for your customer?

**Advice**
 Information Only

Source will automatically email you and your customer a copy of documents containing important information about the policy when you click 'Next'. Source recommends you read these before continuing.

[You can also download documents by clicking here](#)

Tick to opt out of automatically emailing a copy of the documents to your client. Please note: if ticked, it is your responsibility to send these documents.



### Learning Note:

Advisers can set their preferences to have the pre-sale documents sent automatically by email to their client when they select **Next: Compliance**.

10. To proceed, select **Next: Compliance**:

What service have you provided for your customer?

**Advice**
 Information Only

Source will automatically email you and your customer a copy of documents containing important information about the policy when you click 'Next'. Source recommends you read these before continuing.

[You can also download documents by clicking here](#)

Tick to opt out of automatically emailing a copy of the documents to your client. Please note: if ticked, it is your responsibility to send these documents.

## 6 Start Your Cover/Compliance Screen

1. The **Start Your Cover** screen is displayed:

**Source** Person & Property Build Quote Declarations Summary **Start cover** Return to Dashboard

### Starting the cover; questions to ask your customer

When would you like the cover to start?  
dd/mm/yyyy

Preferences

Would your client like their policy to automatically renew next year?

Would your client like to go paperless and receive documents via email?

Mortgage lender to be named on the policy and the letter of intent (optional)

Does this policy replace an existing Source policy?

Additional Information

Confirmation of cover email address

Confirmation of cover CC email address

Compliance

Have you confirmed the client is eligible to claim under this policy?

Have you given the customer enough information about this policy to allow them to make an informed decision?

Will you be charging a fee for your intermediary services?

Do you want to disclose the commission to the customer?

Customer Vulnerability Status  Customer vulnerability has not been flagged (click to update)

2. Confirm the **start date** of the cover:

When would you like the cover to start?  
dd/mm/yyyy

January 2026

Mo	Tu	We	Th	Fr	Sa	Su
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

3. Confirm whether the customer wishes to **opt-out of automatic renewal**:

Would your client like their policy to automatically renew next year?

**Caution Note:**

Opting out means that if the client does not take action to renew, the policy will lapse. Customers can opt out or back in at any point during the lifetime of their policy.

4. Confirm whether the customer wishes to **go paperless**:

Would your client like to go paperless and receive documents via email? 

Yes  No

5. If required, enter the name of the **Mortgage Lender**:

Mortgage lender to be named on the policy and the letter of intent

6. Confirm whether the policy will **replace an existing Source policy**:

Does this policy replace an existing Source policy?

Yes  No

7. If **Yes**, confirm the **existing reference number** and the **cancellation date** of the existing policy:

Does this policy replace an existing Source policy?  Yes  No

Existing reference number:

Cancellation date of existing policy:  

8. Confirm the **Confirmation of cover email address**:

Confirmation of cover email address 

**Learning Note:**

This is the email address that the confirmation of cover will be sent to.

9. Enter the **Confirmation of Cover CC email address**:

Confirmation of cover CC email address 

**Learning Note:**

This is the CC email address that the confirmation of cover will be sent to, for example a solicitor.

10. Answer the questions in the **Compliance** section:

**Compliance**

Have you confirmed the client is eligible to claim under this policy?

Have you given the customer enough information about this policy to allow them to make an informed decision?

Will you be charging a fee for your intermediary services?

Do you want to disclose the commission to the customer?

Customer Vulnerability Status Customer vulnerability has not been flagged (click to update)

11. **Additional questions** may be displayed that require a response:

Will you be charging a fee for your intermediary services?

Please confirm the fee amount



**Learning Note:**

The **Vulnerable Customer Flag** is within this section:

Customer Vulnerability Status Customer vulnerability has not been flagged (click to update)

(If a vulnerability has been flagged, the flag will be amber or red.)

12. Once all compliance questions have been answered, select **Confirm Compliance**:

**Compliance**

Have you confirmed the client is eligible to claim under this policy?

Have you given the customer enough information about this policy to allow them to make an informed decision?

Will you be charging a fee for your intermediary services?

Do you want to disclose the commission to the customer?

Customer Vulnerability Status Customer vulnerability has not been flagged (click to update)

13. Select the relevant **payment method**:

**How would you like to pay?**

**£31.67**

Monthly  
(28.5% Representative APR)  
Total Amount Payable £380.04

**£339.35**

Annually

**Pay Later**

Please note that paying monthly will cost more than paying your premium in one single payment.

**Learning Note:**

Direct Debit is the only monthly payment option.  
Selecting pay later will result in the annual premium being charged.

## 6.1 Submitting the Policy - Pay Monthly

### 1. Select **Monthly**:

How would you like to pay?

<p><b>£31.67</b> Monthly (28.5% Representative APR) Total Amount Payable £380.04</p>	<p><b>£339.35</b> Annually</p>
<p><b>Pay Later</b></p>	

Please note that paying monthly will cost more than paying your premium in one single payment.

### 2. Confirm the customer is happy to proceed by reading the statement, and if so, **tick the box**:

As most home insurance premiums are required in advance, instalment payments are commonly facilitated by way of a loan. Under FCA regulations, an assessment of your ability to afford loan payments is required before such a loan is granted.

To assess your application, Source Insurance may use your record from a credit reference agency to make a decision as to whether an agreement can be set up. This may include a County Court Judgment (CCJ) check and verification of your identity.

These searches will be added to the credit reference agency's records about you and may be seen by other organisations making searches.

Tick to confirm if you are happy to proceed (If not, then we cannot offer finance)

### 3. Confirm the bank account **qualifying questions**:

Do you hold a UK bank/building society account of which you are the account holder?	<b>Yes</b>	No
Are you the only person needed to authorise debits from this account?	<b>Yes</b>	No

### 4. Confirm the **customer's household gross annual income**:

What's your annual household income, before tax deductions? (Select an income band)	
Roughly how much money do you have left each month after covering your regular bills and living costs? (Select a disposable income band)	
Back	<ul style="list-style-type: none"> <li>Less than £15,000</li> <li>£15,000 - £34,999</li> <li>£35,000 - £54,999</li> <li>£55,000 - £74,999</li> <li>£75,000 - £94,999</li> <li>More than £95,000</li> </ul>

5. Confirm the **customer's monthly disposable income**:

Roughly how much money do you have left each month after covering your regular bills and living costs? (Select a disposable income band)

- Less than £50
- £50 - £99
- £100 - £199
- £200 - £349
- More than £350

6. Enter the following information:

Field	Input
Name(s) of account holder(s)	Enter Account Holder Name
Branch sort code	Enter Sort Code
Bank/building society account number	Enter Account Number
Direct debit collection day	Select payment date

**Direct Debit**

Names of Account Holders

Branch Sort Code

Bank/Building Society Account Number

Direct Debit Collection Day

7. Advise the client of the **next steps** as instructed on the screen, including **Source Contact Details** and the **Direct Debit Guarantee**. Select **Complete Quote** to proceed:

Your Direct Debit Instruction will be confirmed to you by email or post, depending on whether you have opted for eDocs, within 3 working days or no later than 5 working days before the first collection. Any changes to the frequency or amount of your collections will be advised to you 5 working days in advance.

We will lodge your Direct Debit Instruction against the account provided within the next 5 working days.

The name that will appear on your bank statement will show as - **Source Insurance**.

**Contact Details**


If you have any questions or concerns please see our contact details below:

Telephone: 029 20 265 265      Opening Hours: Monday-Friday 8.30 - 5.00pm

Email: questions@sourcefinance.co.uk

Address: Source Finance, Global Reach, Dunleavy Drive, Cardiff, CF11 0SN

All Direct Debits are protected by a guarantee. The guarantee is detailed below.

 **DIRECT Debit**

**The Direct Debit Guarantee**

- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits
- If there are any changes to the amount, date or frequency of your Direct Debit Source Insurance Limited will notify you 5 working days in advance of your account being debited or as otherwise agreed. If you request Source Insurance Limited to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by Source Insurance Limited or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society.
  - If you receive a refund you are not entitled to, you must pay it back when Source Insurance Limited asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.

A copy of the safeguards under the Direct Debit Guarantee will be sent to you with our Confirmation Letter.

**Complete Quote**

8. The **Confirm payment details** screen is displayed:

**Confirm your account details**

---

**Your account details**

**Policy Holder Name:**  
Mr John Smith

**Name of Account Holder:**  
D Rees

**Sort Code:**  
070246

**Account Number:**  
26030938

I confirm the above information is correct

9. **Tick** the box to confirm the payment details and select **Confirm** to proceed:

**Confirm your account details**

---

**Your account details**

**Policy Holder Name:**  
Mr John Smith

**Name of Account Holder:**  
D Rees

**Sort Code:**  
070246

**Account Number:**  
26030938

I confirm the above information is correct

10. The **Confirmation** screen is displayed, confirming the **policy number** and **start date**:

**Confirmation**

Your customer's policy has been submitted.

**Policy number**

Policy ID: i428826

Insurer	Start Date	Payment
Pen Underwriting - Source Home	01/02/2026	£761.88

**Full name**

Mr Joe Bloggs

**Date of birth**

1980-01-01

**Property address**

57 Amelia Way, Newport, Newport, NP19 0LQ

## 6.2 Submitting the Policy – Pay Annually

### 1. Select **Annually**:

How would you like to pay?

<b>£31.67</b> Monthly (28.5% Representative APR) Total Amount Payable £380.04	<b>£339.35</b> Annually
--	----------------------------

**Pay Later**

Please note that paying monthly will cost more than paying your premium in one single payment.

### 2. The **Card payment screen** will be displayed to enter the customer's card details:

**Process MOTO Payment**

To enhance security and ensure smooth processing of payments, our service provider now requires that the name of the cardholder must be the name stated on the policy.

Card number \*  
XXXX XXXX XXXX XXXX

Expiration date \*  
MM/YY


Security code \*  
XXX

Securely save my card to ease payment at renewal

**Pay**

Please do not refresh your browser or close this window while payment is processing.

3D Secure is not enabled for this payment



### 3. After entering all the customer's card details, select **Pay**:

**Process MOTO Payment**

To enhance security and ensure smooth processing of payments, our service provider now requires that the name of the cardholder must be the name stated on the policy.

Card number \*  
4444 4444 4444 4444

Expiration date \*  
09/26


Security code \*  
999

Securely save my card to ease payment at renewal

**Pay**

Please do not refresh your browser or close this window while payment is processing.

3D Secure is not enabled for this payment



4. The **Confirmation** screen is displayed, confirming the **policy number** and **start date**:

### Confirmation

Your customer's policy has been submitted.

**Policy number**

Policy ID: i428826

Insurer	Start Date	Payment
Pen Underwriting - Source Home	01/02/2026	£781.88

**Full name**

Mr Joe Bloggs

**Date of birth**

1980-01-01

**Property address**

57 Amelia Way, Newport, Newport, NP19 0LQ

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## 6.3 Submitting the Policy – Pay Later

1. Selecting **Pay Later** displays the **Telephone, BACS and Cheque** payment options. Select **Complete Quote** to proceed:

**How would you like to pay?**

**£86.98**  
Monthly  
(28.5% Representative APR)  
Total Amount Payable £1043.76

**£931.94**  
Annually

**Pay Later**

Please note that paying monthly will cost more than paying your premium in one single payment.

**Please arrange for your client to make payment in one of the following ways:**

**Telephone:**

Please ask the card holder to call us on our dedicated payments only line: 02920 265 299 Monday to Friday 8:30am - 5:00pm

---

**BACS:**

Send an on-line banking or BACS payment

**IMPORTANT:** In order to process bank transfers correctly the client must include their policy ID in the payment narration. Failure to provide a reference to the policy it is intended to pay can lead to delay in reconciling or return payments.

Please use the details provided below:

Bank Account Name: Source Insurance Ltd  
Sort Code: 20-18-76  
Account Number: 00649538

---

**Cheque:**

Please make the cheque payable to "Source Insurance Limited"

**Note the policy number on the reverse and send to:**  
Source Insurance Limited  
Global Reach  
Dunleavy Drive  
Cardiff  
CF11 0SN

**Complete Quote**

2. The **Confirmation** screen is displayed, confirming the **policy number** and **start date**:

**Confirmation**

Your customer's policy has been submitted.

**Policy number**

Policy ID: I428826

Insurer	Start Date	Payment
Pen Underwriting - Source Home	01/02/2026	£761.88

**Full name**

Mr Joe Bloggs

**Date of birth**

1980-01-01

**Property address**

57 Amelia Way, Newport, Newport, NP19 0LQ

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