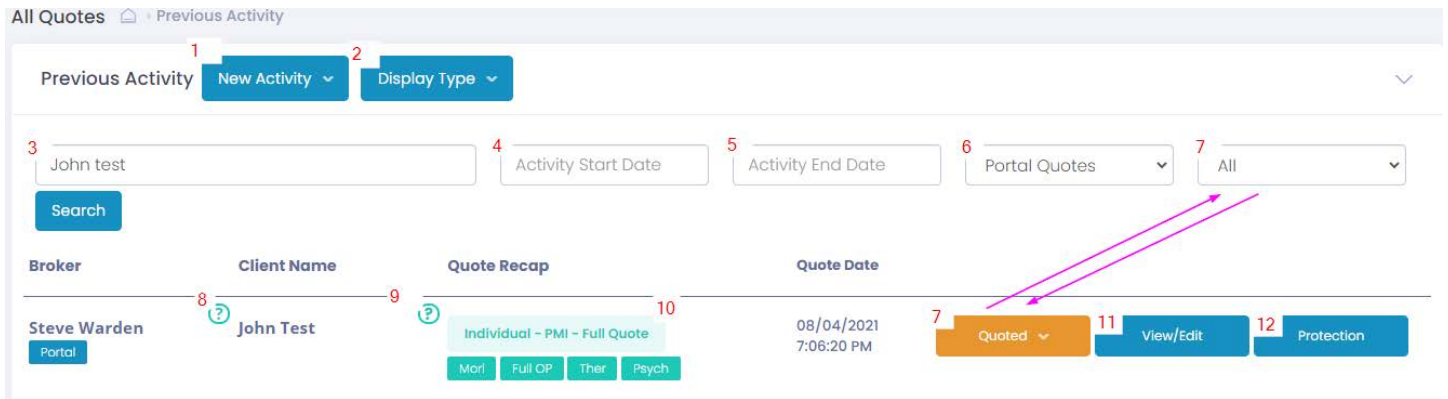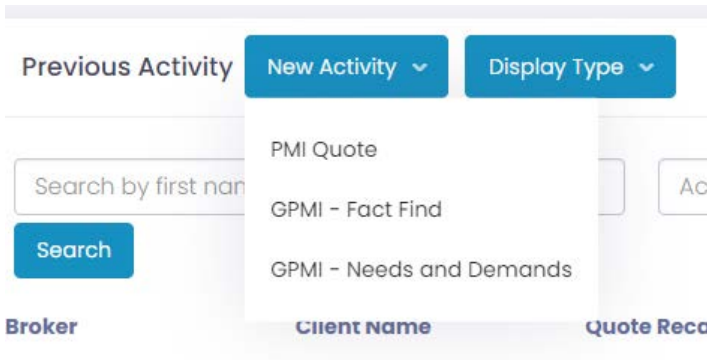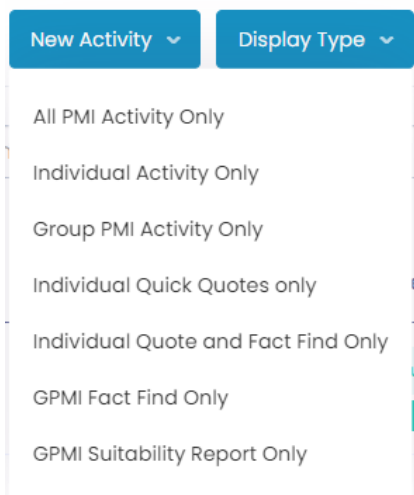# Previous Activity Screen (PMI) explained

1. Previous Activity- New Activity

Clicking this button is another quick way to get around. You can start a new PMI Quote or jump straight to generating a GPMI Fact Find or Needs and Demands Letter.

2. Previous Activity- Display Type

Here you will be able to quickly find the type of activity you wish to display. For instance if you only wish to display clients that have had a quote and fact find on them then you would simply select "Individual Quote and Fact Find Only".

3. Name Search

This Box is self explanatory, enter the clients name you wish to search for and it will return results for the activity undertaken on that client. This can be combined with other search criteria if you wish to narrow down searches.

4. This also Includes step 5. If you wish to view activity within a certain time period selecting the start and end date will only return quotes or activity done between those dates.

5. As Above

6. Type of Quote
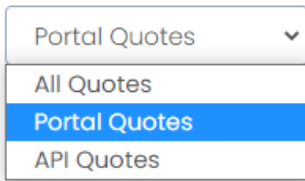
This won't be relevant to most Rapid Quote users, if however you have a commercial licence and have access to our api functionality or access to our plug-in software then you are able to identify easily where the activity has taken place. To find out more about our api integration or plug-in and how it could help your business then please call us on 0800 5837288

7. Quote Status
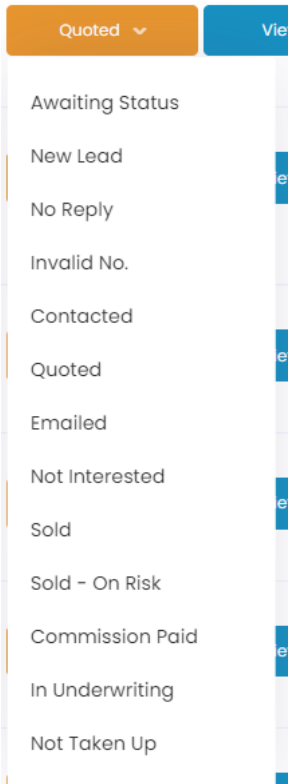
A new feature to version 2 is the ability to define what status the quote or client is currently at. Each status is colour coded so it is easy to identify at a glance. Updating the status is done at client level and doesn't need to be done at every quote as the search function will only search for statuses that have been updated.
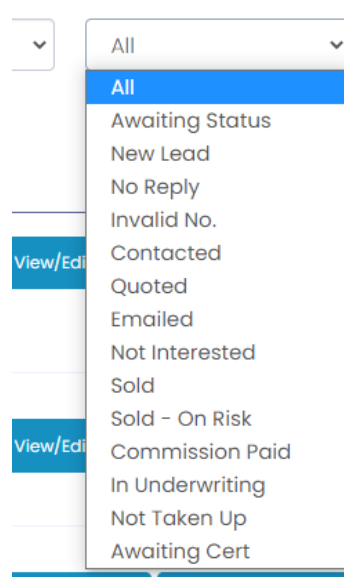
Now by selecting the status and clicking search it will only display clients that have been assigned that status. So for instance if you wish to see all clients that sold between the start of March and end of June select the status of sold and the date range and the results will be displayed.

8. Client Details Info Bubble
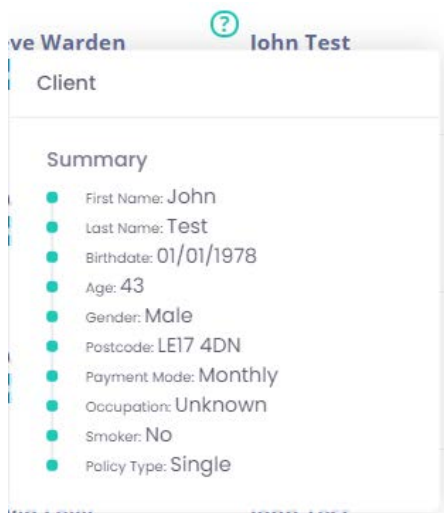
Clicking the info bubble next to the clients name will bring up that clients basic details to save the need of going into the full quote form if information is needed quickly.

9. Quote Recap Info Bubble

The Quote recap info bubble is the quickest way to see what criteria has been selected for a particular quote. It will show immediately what core cover options have been applied as well as generic add-ons and insurer specific add-ons.

Quote

Summary
- Hospital List: Countrywide (Excluding London)
- Underwriting: Moratorium
- Outpatient: Full
- Policy Type: Single

Add-Ons
- Therapies: Yes
- Mental Health: Yes

Insurer Options
- AVIVA NCD Uplift: No
- BUPA Cancer: Full
- BUPA Complimentary Medicine: Yes
- BUPA GP: Yes
- BUPA Smoking: No
- Exeter NCD Request: NCD Rated

10. Quote Recap

Individual – PMI – Full Quote

CPME   Full OP   NCD   Fact Find

Identifying your quotes is easy with quote recap, it will briefly tell you underwriting type, outpatient level, add-ons that may have been selected and if a fact find has been done. Now with the new modify by insurer feature it will also tell you if a full quote or insurer specific quote has been done.

11. View/Edit Button

Clicking this button will immediately take you into the results screen for that particular quote

Voluntary Excess	£0	£100	£150	£200	£250	£300	£500	£750	£1000	£2000		
Vitality Health Insurance Mori Plus (Therapy – Full)	£76.91	£68.47			£58.30		£53.30		£45.21		MORE	EDIT

Voluntary Excess	£0	£100	£150	£200	£250	£300	£500	£750	£1000	£2000		
WPA Healthcare Health Insurance (Elite)							£89.50	£83.35	£75.11		MORE	EDIT

Voluntary Excess	£0	£100	£150	£200	£250	£300	£500	£750	£1000	£2000		
Freedom Health Insurance Elite – Therapy 750	£92.55	£83.30			£78.67		£71.73		£60.16		MORE	EDIT

Voluntary Excess	£0	£100	£150	£200	£250	£300	£500	£750	£1000	£2000		
AVIVA Healthier Solutions	£92.72	£85.78		£78.83			£69.55		£60.28		MORE	EDIT

Voluntary Excess	£0	£100	£150	£200	£250	£300	£500	£750	£1000	£2000		
Bupa Bupa by You – Comprehensive	£93.17	£86.18	£83	£80.18	£77.54		£62.71		£54.72	£41.9	MORE	EDIT

12. Protection/PMI Button

Dependant on the type of quote that has previously been performed you will see either protection or PMI displayed here. If you have previously done a PMI quote then clicking the "protection" button will immediately take you into a protection quote with all essential details filled in to avoid any re-keying. To add protection quoting to your account please call us on 0800 5837288, there is currently no additional charge for this feature.