MY LOCAL BROKER

Diversifying with Allianz

Setting up the Allianz Insurance Referral (Home Loans) Email Template

- 1. To set up the 'Allianz Insurance Referral (Home Loans)' email template, go to Settings > External Notifications.
- 2. Click on the **+** ADD NEW button near the top right corner.
- **3.** This will open the 'Add external notification' popup window where you can select the external notification type, add Cc and Bcc recipients to your email, insert the external notification template name, subject line and write the content as per the below screenshot and template:

MY LOCAL BROK	ER Seereds MyLoopel Broker	🔇 Deals 🥪 Tasks 😁 Contacts 🌘 Repor	ts 🗿 Dashboard 👩 Library 🕤 Co	nnect 💿 🗄
Settings : External notil	Add		× District	IS + ADD NEW
😑 Billing details	Type Name Allianz Insurance Referral (Home Loans) Email Template			v I
🚊 Broker tools	E-Mail subject Allianz Insurance Referral for {contact1.nameFull}		<> ACT	IONS
Commissión groups	E-Mail CC	E-Mail BCC		
 Templates Taeke 	E-Mal/SMS content Dear Allianz Mortrage Broker Sales Team	8	0	
Document templates	Deferrer Detaile			
Required documents	Referrer Name - {deal.owner.nameFull}			
External notifications	Referrer Code - ***Enter Referrer Code*** Referrer Email - {deal.owner.email}			
Call scripts	Customer Contact Details			
e Process	Customer Name - {contact1.nameFull}			k
Labels:	Preferred Contact Number - {contact1.primaryPhone}			
E Custom fields	Preferred Contact Time - ***Enter Preferred Contact Time***			
 Workflows 	Customer Email - {contact1.eMail}			P
ttt integrations	Product Details			b
A Brd party applications	Preferred Product - ***Building / Contents / Landlord*** Duilding Cum laguad ###Enter Building Cum laguad###			
	Contents Sum Insured - ***Enter Contents Sum Insured***			ř.
	Security Address - {brokerTools.securityDetails.address1}			
Web forms	Mortgagee - {brokerTools.preferredProduct.lender}			
Ov API	Loan Purpose - {deal.loan.details.loanSplit1.loanType}			2
III Data	Expected Settlement Date - {deal.expectedCloseDate}			and the second second
Import			× CANCEL V SAVE	
=	Your Application Has Been Submitted Hi (firstNameOfContacts).	We have now submitted your loan application to the le		

Type: E-Mail

Name: Allianz Insurance Referral (Home Loans) Email Template

E-Mail Subject: Allianz Insurance Referral for {contact1.nameFull}

E-Mail CC:

E-Mail BCC:

E-Mail/SMS Content:

Dear Allianz Mortgage Broker Sales Team,

Referrer Details

- Referrer Name {deal.owner.nameFull}
- Referrer Code ***Enter Referrer Code***
- Referrer Email {deal.owner.email}

Customer Contact Details

MY LOCAL BROKER

- Customer Name {contact1.nameFull}
- Preferred Contact Number {contact1.primaryPhone}
- Preferred Contact Time ***Enter Preferred Contact Time***
- Customer Email {contact1.eMail}

Product Details

- Preferred Product *****Building / Contents / Landlord*****
- Building Sum Insured ***Enter Building Sum Insured***
- Contents Sum Insured ***Enter Contents Sum Insured***
- Security Address {brokerTools.securityDetails.address1}
- Mortgagee {brokerTools.preferredProduct.lender}
- Loan Purpose {deal.loan.details.loanSplit1.loanType}
- Expected Settlement Date {deal.expectedCloseDate}

Consent

- I have gained consent from this customer to provide their details to Allianz and for Allianz to contact them by telephone regarding its insurance products.
- I have adhered to my obligations as per the <u>Allianz Letter of Acknowledgement</u> and <u>Allianz</u> <u>Referral Guidelines</u>.

Thank you for your assistance.

Note: The text in red needs to be manually updated before emailing the customer referral to Allianz.

4. Click on the **SAVE** button once finished.

Please see below knowledge base article for more information:

<u>Creating and managing external notifications</u>

Your Chief Training Manager is **Santosh Mathew** who can be contacted on 03 7020 9482 or support@mylocalbroker.com.au

Need Help? Use our LIVE chat feature

If you need assistance using Chief and want your question answered quickly please use our live chat feature built into your Chief account. This help desk feature is open Monday to Friday from 6am to 10pm AEST and Saturday from 8am to 3pm AEST. Please click on the green circle button in the bottom right hand corner of your Chief screen to get started.