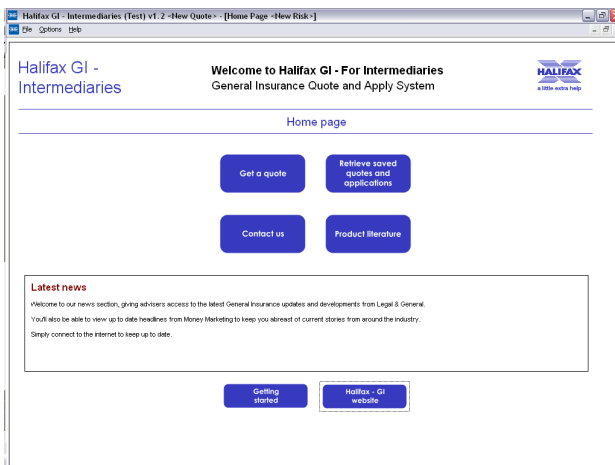


Getting Started

This page is a two minute 'quick start guide' to highlight the key points for new users. It can be used in conjunction with the 'User Guide' within the Halifax GI System.

For more information you can look on Halifax's agency website (www.halifax-intermediaries.co.uk).



What is Halifax GI?

Halifax GI is a quote and buy tool from Halifax that allows agents to make quick and easy sales of residential home insurance and landlord's Buy-to-Let insurance.

How does it work?

The software is initially installed from a disc onto the agent's computer so that sales can be made whilst not connected to the Internet. Once an application is ready to submit, then the agent needs to be connected to the Internet to allow electronic submission of the applications to Halifax. Monthly updates of the software are released and are available via web downloads;

the software will prompt the user for these.

Steps to get going:

1. **Install the software** - the system will take you through this process and install the software on the c: drive of your computer. That's also the default location for customer data (in a secure, encrypted format).
2. **Set the password** – the default is to have one user called 'admin' for which the user is prompted to set a 'strong' password. You are prompted to change this each month to ensure ongoing data security.
3. **Enter your agent details** – the first time user will be taken to this page at initial install. Subsequent changes can be made by selecting 'Options' and then 'Agent Administration' on the grey menu bar at the top of any Halifax screen. The Halifax agency number is vital. **(Optional) Multiple Users** – it is possible to set up several user 'accounts' on one machine and also to change the default user and client data locations to a shared server (LAN). Instructions on this are within the User Guide.
4. **Start selling!** – You will get to an indicative price very quickly (e.g. date of birth and risk postcode for HIC). Halifax GI was designed to be intuitive and further user feedback has been incorporated into version 1.0 so that it should be self-explanatory. System documentation is found via the 'Help' option in the grey menu bar. Click on icons to reveal their meaning. The large on-screen buttons will take you through to a successful sale!
