

# UINSURE ADVISER PLATFORM

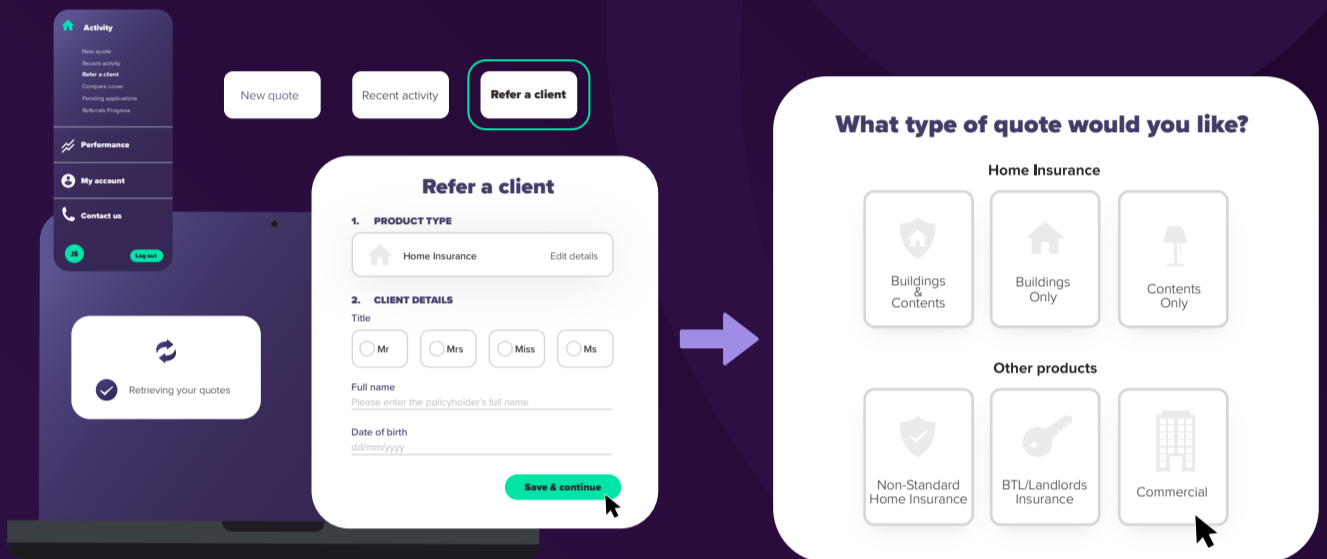
## COMMERCIAL REFERRAL GUIDE

This guide explains how mortgage intermediaries can submit a Commercial referral to via the Uinsure Adviser Platform.

**1. LOG IN TO THE UINSURE INTERMEDIARY WEBSITE**  
Log into the Uinsure Intermediary portal using your usual credentials.

**2. GO TO “REFER A CLIENT”**  
Select the *“Refer a Client”* tab from the main navigation menu.

**3. CHOOSE PRODUCT TYPE – COMMERCIAL**  
You will see several product types. Select *“Commercial”* to begin your Commercial referral.  
Click *“Save & Continue”* to move forward.



**4. ENTER CLIENT DETAILS**  
Complete the Client Details section, including:

- Client Name
- Date of Birth

Click *“Save & Continue”* to move forward.

**5. ENTER PERSON TO CONTACT INFORMATION**  
Provide details for the person Uinsure will contact:

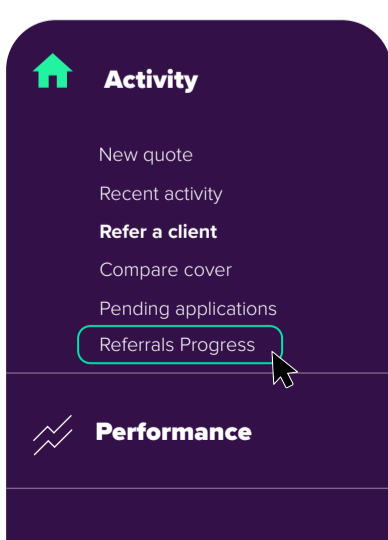
- Telephone Number
- Email Address

**6. SELECT CALLBACK DATE AND TIME**  
Choose a callback date/time (ideally within the next 7 days) that suits the client.  
Click *“Save & Continue”* to move forward.

**7. PROVIDE QUOTE DETAILS**  
Complete the Quote Details section:

- Address to be insured
- Type of customer (select from dropdown)
- Any additional referral notes

**8. SUBMIT THE REFERRAL**  
Click *“Send Referral”* to submit the client details to Uinsure’s referral team.  
All updates can be seen via the *“Referral Progress”* tab on the left-hand side of the website:



**VISIT OUR ADVISER PLATFORM**