



# The Exchange Annuity Service

## Guide to adding Agency codes

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# Introduction

The Exchange quotation services send information to providers based on your Exchange account to enable them to identify you and produce quotes based on the correct terms.

Generally this is based on your FRN (FCA Firm Reference Number), but in rare cases this may not result in your agency being properly identified. In these cases you may receive indicative quotes from providers, or a message to say that default terms have been used.



This solution will enable you to link your Legal & General Agency number for annuities with your Exchange account, enabling the return of accurate quotes linked to the correct agency terms. Further providers and product types are expected to be introduced in future.

# How to use

Your agency code can be entered by clicking the **My Account** button under the **Exchange Support** section on the homepage.

<h3>The Exchange support</h3> <p>Our help and support centre gives you access to a range of user guides and video tutorials, as well as our most common support issues.</p> <p>To access the centre, simply click <a href="#">Help</a> from any page on The Exchange.</p> <p>Manage your personal information <span style="border: 2px solid red; padding: 2px;"><a href="#">My account</a></span></p> <hr/> <h4>Customer care</h4> <p>Open 9am-6pm, Mon-Fri Tel: +44 (0)345 068 3000 Email: <a href="mailto:exchange.customercare@iress.co.uk">exchange.customercare@iress.co.uk</a></p>	<h3>Our products and services</h3> <h4>Want to know more?</h4> <p>Find out more about our <a href="#">products and services</a></p> <p>View the complete Exchange <a href="#">price list</a></p> <p>Apply for additional <a href="#">licences</a></p> <hr/> <h4>Products and services information</h4> <p>Open 9am-5:30pm, Mon-Fri Tel: +44 (0)345 053 0490 Email: <a href="mailto:exchange.sales@iress.co.uk">exchange.sales@iress.co.uk</a></p>
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On the **My Account** page click on the **Manage Agency References** option under the **Manage Configuration** section.

<h3>Manage account</h3>  <p>Manage and view your user account details.</p> <hr/> <p><a href="#">View my personal data</a></p> <hr/> <p><a href="#">Manage UNIPASS certificate</a></p>	<h3>Manage configuration</h3>  <p>Configure your user settings for use in The Exchange.</p> <hr/> <h4>Manage panels</h4> <p><span style="border: 2px solid red; padding: 2px;"><a href="#">Manage agency references</a></span></p>
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Click on the **L&G** button.


**My account : Manage agency references**

Manage the agency references against the providers below:



Key in your **User Reference** and click the **Save & Return** button.

**My account : Manage agency references**



Manage the agency references against the provider below:

Annuities

User reference

Key your L&G provided User Reference number here.


Click here to finish.

[← Back](#) [Reset all](#) [SAVE & RETURN ▶](#)

On successful completion, the **L&G** button will now show a green tick.

**My account : Manage agency references**

Manage the agency references against the providers below:



The agency number will now be used for your Legal & General annuity quotes.

## Need Help?

Please give our Customer Care Line a call on **+44 (0)345 068 3000** or e-mail us at [exchange.customercare@iress.co.uk](mailto:exchange.customercare@iress.co.uk) for assistance.



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