

Content 5 – Policy Enquiries

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1) Search Criteria Options

Client/Policy Search Criteria

Agent Number	<input type="text"/>
Quote/Policy Number	<input type="text"/>
ID Number	<input type="text"/>
Surname/Company	<input type="text"/>
Anniversary Month	<input type="text"/>
Status	<input type="text"/>

Search

Clear

Report

Memory

Surname/Company	Initials	ID Number	Age	Quote/Policy No	Inception Date	Anniversary	Status	Profile	Frequency
No records found									

Create Client

Search Criteria:

- **Agent Number:** - Dropdown field which allows you to select your agent number if more than one.
- **Quote/Policy Number:** - Preferred method to search for an existing client.
- **ID Number:** - Search for an existing client by using **ID Number**.
- **Surname/Company:** - Search for an existing client using **Surname**.
- **Anniversary Month:** - Dropdown field allowing you to refine your search using a particular month.
- **Status:** - Dropdown field allowing you to refine your search to a policy status. i.e.: Cancelled – Policy – Quote – Quote Expired – Incomplete
- When searching for a NEW Client, use Surname and ID together.

An individual search selection or a combination of the fields will display the results found, under the headings listed below. All this information can be exported to a PDF Document for printing purposes, by selecting the Report Button

Surname/Company	Initials	ID Number	Age	Quote/Policy No	Inception Date	Anniversary	Status	Profile	Frequency
No records found									

2) Searching all Policies

To view all policies (Active, Cancelled, Quotes etc) linked to your USER ID and the agent number(s) you have access too, will be done via the screen below.

Users must select the SEARCH Button, in the below screen without populating ANY criteria i.e.: All fields must be left blank.

Client/Policy Search Criteria

Agent Number

Quote/Policy Number

ID Number

Surname/Company

Anniversary Month

Status

Search **Clear** **Report** **Memory**

Surname/Company	Initials	ID Number	Age	Quote/Policy No	Inception Date	Anniversary	Status	Profile	Frequency
No records found									

Create Client

The Empty Search criteria, has produced a list of 308 clients.

Client/Policy Search Criteria

Agent Number

Quote/Policy Number

ID Number

Surname/Company

Anniversary Month

Status

Search **Clear** **Report** **Memory**

Previous **1-10 of 308** Next 10

Surname/Company	Initials	ID Number	Age	Quote/Policy No	Inception Date	Anniversary	Status ▲	Profile	Frequency
SINGH	N	740309	37	20942281	2004.10.01	2011.10.01	Policy	High Net Worth	Monthly
Ganho	R	830906	27	601277255	2010.05.13	2011.05.13	Quote Expired	Standard	Monthly
Blackburn	TS	820329	29	600154664	2009.05.09	2010.05.09	Quote Expired	Standard	Monthly
Nkulu	N	760701	35	601551373	2010.06.20	2011.06.20	Quote Expired	Standard	Monthly
Taylor	R	650630	46	601550334	2010.06.20	2011.06.20	Quote Expired	Standard	Monthly
Maree	A	560101	55	601434704	2010.06.07	2011.06.07	Quote Expired	Standard	Monthly
Clay	A	720115	39	602134733	2010.10.01	2011.10.01	Quote Expired	Standard	Monthly
Bosman	M	650324	46	602094316	2010.09.26	2011.09.26	Quote Expired	Standard	Monthly
Thackeray	M	900508	21	602187888	2010.10.10	2011.10.10	Quote Expired	Standard	Monthly
Hawkins	A	7501085	36	601816717	2010.08.07	2011.08.07	Quote Expired	Standard	Monthly

Create Client

This list produced, includes all active clients, cancelled clients, current as well as expired quotes, linked to the agency number(s) you have access to.

The mf online application will automatically display 10 clients at a time.

 **Viewing more than 10 clients at a time**


Previous 1-10 of 308 Next 10

Surname/Company	Initials	ID Number	Age	Quote/Policy No	Inception Date	Anniversary	Status ▲	Profile	Frequency
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1-10 of 308 ▼ Next 10

By selecting the drop-down filter you can select the next batch of 10 clients.

- 1-10 of 308
- 11-20 of 308
- 21-30 of 308
- 31-40 of 308
- 41-50 of 308
- 51-60 of 308
- 61-70 of 308
- 71-80 of 308
- 81-90 of 308
- 91-100 of 308
- 101-110 of 308
- 111-120 of 308
- 121-130 of 308
- 131-140 of 308
- 141-150 of 308
- 151-160 of 308
- 161-170 of 308
- 171-180 of 308
- 181-190 of 308
- 191-200 of 308
- 201-210 of 308
- 211-220 of 308
- 221-230 of 308
- 231-240 of 308
- 241-250 of 308
- 251-260 of 308
- 261-270 of 308
- 271-280 of 308
- 281-290 of 308
- More...



Clients are viewed in batches of 10, however if there are less than 250 clients you will get an option SHOW ALL.



All HEADINGS can be further filtered. If you wish to view your clients in Alphabetical Order by Surname click on the Surname/Company Heading and the column in question will filter the information. This filter can also be used to see the clients AGE'S in ascending or descending order, as well as to view Frequency, split between Monthly and Annual. Each heading in its own right is a filter.

3) Searching all Active Policies

If the same search is done selecting the STATUS as POLICY, the result will only produce Active Clients

As can be noted the previous result of 308 clients has dropped to 103 clients. (Cancelled Clients, Quotes and Expired Quotes are removed)

Client/Policy Search Criteria

Agent Number

Quote/Policy Number

ID Number

Surname/Company

Anniversary Month

Status

Results: 1-10 of 103

Surname/Company	Initials	ID Number	Age	Quote/Policy No	Inception Date	Anniversary	Status	Profile	Frequency
Lizard	L	LL123456	38	604447186	2011.08.22	2012.08.22	Policy	Allsure Upgrade	Annual
Tester	F	AEO00204	32	604437865	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AEO00202	32	604437849	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AEO00201	32	604437830	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
tester	xx	23432423422	31	604424623	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
tester	x	7512015970095	35	604408970	2011.07.15	2012.07.15	Policy	Standard	Annual
tester	b	7512016614098	35	604408776	2011.07.15	2012.07.15	Policy	Standard	Annual
The Frog	K	73062002620811 X	38	604392373	2011.09.01	2012.09.01	Policy Incomplete	Allsure Upgrade	Annual
TROLLIP	B	570226	54	21544989	2005.02.01	2012.02.01	Policy Incomplete	High Net Worth	Monthly
SINGH	N	740309	37	20942281	2004.10.01	2011.10.01	Policy	High Net Worth	Monthly

The "Status" Function, can be used to filter a variety of searches like Cancelled policies, Quotes, Expired Quotes in isolation.

4) Display Policies via a renewal month.

By selecting a particular Anniversary Month (August) and by selecting the Status as Policy, the system will produce a list of all active clients that fall due for renewal in that month.

As can be noted the previous result of 308 (All Policies) dropped to 103 (Active Policies Only) and has now further dropped to 31 ("Active" "August" Policies Only)

Client/Policy Search Criteria

Agent Number

Quote/Policy Number

ID Number

Surname/Company

Anniversary Month

Status

Results: 1-10 of 31

Surname/Company	Initials	ID Number	Age	Quote/Policy No	Inception Date	Anniversary	Status	Profile	Frequency
Lizard	L	LL123456	38	604447186	2011.08.22	2012.08.22	Policy	Allsure Upgrade	Annual
Tester	F	AEO00204	32	604437865	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AEO00203	32	604437857	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AEO00202	32	604437849	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AEO00201	32	604437830	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AEP00028	32	604430186	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	201108010954	32	604427576	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
tester	xx	23432423422	31	604424623	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Kalinda	K	KL12345	38	604342783	2011.08.22	2012.08.22	Policy	Allsure Upgrade	Annual
Kalinda	K	KL12345	38	604342171	2011.08.22	2012.08.22	Policy	Allsure Upgrade	Annual

5) Report Button

Client/Policy Search Criteria

Agent Number

Quote/Policy Number

ID Number

Surname/Company

Anniversary Month

Status

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Surname/Company	Initials	ID Number	Age	Quote/Policy No	Inception Date	Anniversary	Status	Profile	Frequency
Lizard	L	LL123456	38	604447186	2011.08.22	2012.08.22	Policy	Allsure Upgrade	Annual
Tester	F	AEQ00204	32	604437865	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AEQ00203	32	604437857	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AEQ00202	32	604437849	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AEQ00201	32	604437830	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AEP00028	32	604430186	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	201108010954	32	604427576	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
tester	xx	23432423422	31	604424623	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Kalinda	K	KL12345	38	604342783	2011.08.22	2012.08.22	Policy	Allsure Upgrade	Annual
Kalinda	K	KL12345	38	604342171	2011.08.22	2012.08.22	Policy	Allsure Upgrade	Annual

By clicking on the Report Button, the search criteria used will be populated in a PDF Document, as detailed below.

Agent Number

Quote/Policy Number

ID Number

Surname/Company

Anniversary Month August

Status Policy

Client/Policy Search Results

Total: 31

Surname/Company	Initials	ID Number	Age	Quote/Policy No.	Inception Date	Anniversary	Status	Profile	Frequency
Lizard	L	LL123456	38	604447186	2011.08.22	2012.08.22	Policy	Allsure Upgrade	Annual
Tester	F	AEQ00204	32	604437865	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AEQ00203	32	604437857	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AEQ00202	32	604437849	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AEQ00201	32	604437830	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AEP00135	32	604433396	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AEP00036	32	604432979	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AEP00035	32	604432774	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Van Rooyen	B	12555m	49	604431573	2011.08.22	2012.08.22	Policy	Allsure Upgrade	Annual
Tester	F	AEP00034	32	604431174	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AEP00033	32	604430976	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AEP00031	32	604430771	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AEP00030	32	604430577	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AEP00029	32	604430372	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AEP00028	32	604430186	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	201108010954	32	604427576	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Partivster	A	201107291136	31	604425972	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
tester	x	PT11072403211	35	604425778	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
tester	x	PT10074215011	35	604425573	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
tester	xxx	23432423422	31	604424623	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Vink	D	DV123	38	604413168	2011.08.22	2012.08.22	Policy	Allsure Upgrade	Annual
Vink	D	DV123	38	604413095	2011.08.22	2012.08.22	Policy	Allsure Upgrade	Annual
Kernse	F	123XCV	38	604407176	2011.08.22	2012.08.22	Policy Incomplete	Allsure Upgrade	Annual

6) Identifying a Converted Policy (Allsure Upgrade)

The heading **PROFILE** will either indicate:

Standard, High Net Worth, Retired, Retired High Net Worth or Allsure Upgrade.

If the profile displays anything other than Allsure Upgrade, that client has yet to be converted to the New Allsure Upgrade Product.

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Surname/Company	Initials	ID Number	Age	Quote/Policy No	Inception Date	Anniversary	Status	Profile	Frequency
Lizard	L	LL123456	38	604447186	2011.08.22	2012.08.22	Policy	Allsure Upgrade	Annual
Tester	F	AE000204	32	604437865	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AE000202	32	604437849	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
Tester	F	AE000201	32	604437830	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
tester	xx	23432423422	31	604424623	2011.08.26	2012.08.26	Policy	Allsure Upgrade	Annual
tester	x	7512015970095	35	604408970	2011.07.15	2012.07.15	Policy	Standard	Annual
tester	b	7512016614098	35	604408776	2011.07.15	2012.07.15	Policy	Standard	Annual
The Frog	K	73062002620811 X	38	604392373	2011.09.01	2012.09.01	Policy Incomplet	Allsure Upgrade	Annual
TROLLIP	B	570226	54	21544989	2005.02.01	2012.02.01	Policy Incomplet	High Net Worth	Monthly
SINGH	N	740309	37	20942281	2004.10.01	2011.10.01	Policy	High Net Worth	Monthly

Create Client

7) Additional Information

When you are in a Specific Policy in a "VIEW" mode, you will see at the bottom of every screen an Additional Information Heading

Additional Information

[Schedules](#)





[History](#)

[Finance](#)

[Claims](#)

[Loss Ratio](#)

This is broken down under the following Sub-Headings

-  Schedules
-  History
-  Finance
-  Claims
-  Loss Ratio

This information is **Client** Specific.

Additional Information – Schedules

All Schedules generated for this Policy will be displayed.
Documents will be displayed by "Year".

Quote/Policy Documents

Display policy documents for the year

Document	Processing Date
No documents were found for the selected year	

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Additional Information – History**Quote/Policy History**

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Processing Date	Effective Date	Transaction	Desc	Premium	Add-Ref
03.08.2011	23.08.2011	Midterm Adjustment	ilio	3918.96	0.01
02.08.2011	01.08.2011	Midterm Adjustment	ilio	3918.95	58.19
02.08.2011	01.08.2011	Midterm Adjustment	ilio	3889.86	0
04.05.2011	01.06.2011	Revised Renewal Invitation	Amended Renewal	3140.65	-127.25
04.05.2011	01.05.2011	Midterm Adjustment	Amendment of value of cellphone	3171.32	-127.25
18.04.2011	01.06.2011	Renewal	Amended Renewal	3205.28	-98.68
20.03.2011	01.06.2011	Renewal	Amendment of value of cellphone	3303.96	0
20.03.2011	11.03.2011	Midterm Adjustment	Amendment of value of cellphone	3233.95	0
20.03.2011	10.03.2011	Midterm Adjustment	Amendment of value of cellphone	3233.95	0
20.03.2011	01.03.2011	Midterm Adjustment	Addition to All Risks	3218.59	0

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The History Tab allows you to follow what was done for each transaction. The Description column is generated from the Compulsory "Short Description of Amendment" field the user is asked to complete every time a transaction is completed, allowing an Audit of what has transpired on a policy. This Description does NOT print on any schedules.

To view a Particular Transaction, click on the line you wish to view. This will take you into a "View Mode" of what the policy looked like at that particular Processing /Effective date. As noted below.

Reprinting of previous schedules can also be done using the History Tab. Once you have selected the version you wish to view, the Policy will open in a non editable mode reflecting the Cover types, Limits of Compensation etc at that date.

As can be noted there is a REPRINT SCHEDULE option, allowing the user to reprint historic versions of the policy.

View or edit quote

Co-policyholders

Policy Sections

Section Code	Section name	Active Items	Limit of Compensation	Premium	AddRef	Discount	Active
004	Household Goods	1	350,000	284.28	0.00	Y	<input checked="" type="checkbox"/>
020	Personal Accident	3	1,760,000	197.13	0.00	Y	<input checked="" type="checkbox"/>
031	All Risks	9	38,780	262.33	0.00	Y	<input checked="" type="checkbox"/>
053	Personal Liability	1	5,000,000	6.05	0.00	N	<input checked="" type="checkbox"/>
060	Motor	2	310,000	1,684.13	0.00	Y	<input checked="" type="checkbox"/>
062	Motorcycle	1	12,000	62.63	0.00	Y	<input checked="" type="checkbox"/>
100	Legal Costs	1	10,000	7.37	0.00	N	<input checked="" type="checkbox"/>
121	Sasria non motor	1	1,838,780	6.62	0.00	N	<input checked="" type="checkbox"/>
122	Sasria Motor			6.00	0.00		<input checked="" type="checkbox"/>
123	Hospital Cash	1		242.52	0.00	N	<input checked="" type="checkbox"/>
002	Houseowners	1	1,450,000	362.95	0.00	N	<input checked="" type="checkbox"/>
118	Bereavement Expenses	2		44.08	0.00	N	<input checked="" type="checkbox"/>
INFO	Information Line			0.00			<input checked="" type="checkbox"/>

Section Code	Fees & Duties	Premium	AddRef
FEE	Policy Fee	7.50	0.00
FEE	Broker Service fee	45.00	0.00

Additional Information

[Schedules](#)
[History](#)
[Finance](#)
[Claims](#)
[Loss Ratio](#)

Maintenance Request **Back** Update **Reprint Schedule**

The REPRINT SCHEDULE Button will navigate the user to the "Transaction Confirmation Screen".

The user can select whether they would like that version of the schedule to be emailed or posted.

Transaction Confirmation

Transaction completed successfully!

Documents	
<input checked="" type="checkbox"/>	Mid Term Adjustment Letter
<input checked="" type="checkbox"/>	Mid Term Adjustment Schedule
<input type="checkbox"/>	Copy Schedule Letter
<input type="checkbox"/>	Copy of Schedule

Method of delivery

User E-mail E-mail Post

Client E-mail E-mail Post

OK

Alternatively the user can click on the document name in question and it will open in a PDF format.

Additional Information – Finance

User will be navigated to the Policy Accounting History

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Description	Effective Date	Due Date	Process Date	Amount	Broker Fee	Gross Total	Balance	Commission	Commission Balance	User ID	Unpaid	Unpaid Reason
Installment	2011.05.01	03.05.2011	20.03.2011	-45.00	45.00	0.00	0.00	0.00	0.00	TIABUM01	no	>
Installment	2011.05.01	03.05.2011	20.03.2011	45.00	-45.00	0.00	0.00	0.00	0.00	TIABUM01	no	>
Installment	2011.04.01	01.04.2011	05.03.2011	3,173.58	45.00	3,218.58	0.00	-500.61	0.00	TIABUM01	no	>
Mid Term Adjustment	2009.06.01	01.07.2009	04.06.2009	-553.57	495.00	-58.57	0.00	6.25	0.00	ODUPREEZ	no	>
Mid Term Adjustment	2011.04.01	01.06.2011	20.03.2011	90.00	-90.00	0.00	0.00	0.00	0.00	TIABUM01	no	>
Mid Term Adjustment	2011.06.01	01.06.2011	20.03.2011	-90.00	90.00	0.00	0.00	0.00	0.00	TIABUM01	no	>
Mid Term Adjustment	2011.03.01	01.06.2011	20.03.2011	-45.00	45.00	0.00	0.00	0.00	0.00	TIABUM01	no	>
Mid Term Adjustment	2011.03.01	01.04.2011	20.03.2011	-45.00	45.00	0.00	0.00	0.00	0.00	TIABUM01	no	>
Installment	2008.12.01	01.12.2008	20.10.2008	3,117.47	0.00	3,117.47	0.00	-469.95	0.00	CONVERT2	no	>
Installment	2008.08.01		14.06.2008	3,362.95	0.00	3,362.95	0.00	0.00	0.00	CONVERT2	no	>

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Report
Payments & Collections

To sort the information displayed in Current Date order users would need to click on the Effective Date Column Heading, which will sort the accounting history with the latest information first.

The Transaction Type (Installment, Mid Term Adjustment etc) under the Heading Description, is a **HYPERLINK**

This will open up that transaction and display how that particular premium was arrived up, broken down per policy section for that Effective date.

Policy Number	* 25584141	Agent Number	* 5031707	Branch Name	* Johannesburg 2
Insured Name	*	Agent Name	*	User ID	* H.GREEN
Product	* Allsure South Africa	Broker Fee	* 45.00	Effective Date	* 01.09.2011
Due Date	* 01.09.2011			Financial Month	* September 2011
VAT	* 14%			Processing Date	* 02.08.2011

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Section Name	Premium	Commission %	Commission Amount
Bereavement Expenses	44.07	20	-8.81
Hospital Cash	242.52	20	-48.51
Policy Fee	7.50	0	0.00
Household goods	330.67	20	-66.13
Sasria Motor	4.00	7.5	-0.30
Houseowners	1,125.83	20	-225.13
Personal Liability	6.05	20	-1.21
All Risks	303.39	20	-60.68
Motor	1,560.39	12.5	-195.05
Personal Accident	197.13	20	-39.42
Sasria non motor	16.13	7.5	-1.21
Legal Costs	7.37	20	-1.47
Total	3,844.85		-647.52

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This will allow for any Policy reconciliations, whether Annual or Monthly.

However for monthly policies we have inserted an additional Function called **Payments and Collections**. By selecting this button the amounts debited against the Policy Holder will be displayed as follows:

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Payment Creation Date	Payment Method	Due Date	Amount
2009.03.03	EFT	2009.03.03	3117.47
2009.03.24	EFT	2009.04.01	3117.47
2009.04.22	EFT	2009.05.01	3117.47
2009.06.25	EFT	2009.07.01	5685.18
2009.07.22	EFT	2009.08.03	2842.59
2009.08.26	EFT	2009.09.01	2842.59
2009.09.23	EFT	2009.10.01	2842.59
2009.10.19	EFT	2009.11.02	2842.59
2009.11.23	EFT	2009.12.01	2889.54
2009.12.21	EFT	2010.01.01	2932.11

Once again to arrange the information displayed in a current date order you would need to click on the Due Date column which will arrange the latest information first.

Policy Number * Agent Number * Branch Name *
 Insured Name * Agent Name * Product *

Payment and Collection

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Payment Creation Date	Payment Method	Due Date ▼	Amount
2011.05.25	EFT	2011.06.01	3140.64
2011.05.27	EFT	2011.06.01	-62.63
2011.04.20	EFT	2011.05.03	3233.94
2011.03.24	EFT	2011.04.01	3244.84
2011.02.22	EFT	2011.03.01	3218.58
2011.01.25	EFT	2011.02.01	3225.52
2010.12.21	EFT	2011.01.03	3199.03
2010.11.24	EFT	2010.12.01	3199.03
2010.11.26	EFT	2010.12.01	-517.02
2010.10.25	EFT	2010.11.01	3372.04

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If further detail is required regarding a particular payment, select the monetary value under the Heading Amount, this will refresh the screen and highlight which month you are reviewing.

Payment and Collection

Previous 1-10 of 31 Next 10

Payment Creation Date	Payment Method	Due Date ▼	Amount
2011.05.25	EFT	2011.06.01	3140.64
2011.05.27	EFT	2011.06.01	-62.63
2011.04.20	EFT	2011.05.03	3233.94
2011.03.24	EFT	2011.04.01	3244.84
2011.02.22	EFT	2011.03.01	3218.58
2011.01.25	EFT	2011.02.01	3225.52
2010.12.21	EFT	2011.01.03	3199.03
2010.11.24	EFT	2010.12.01	3199.03
2010.11.26	EFT	2010.12.01	-517.02
2010.10.25	EFT	2010.11.01	3372.04

Payment Details: Receiver/Payer *
 Account Number *
 Bank and Branch Code *

Account Item Details

Date	Due Date	Description	Amount	Balance
2011.06.01	2011.06.01	25584141-M-PREM-Mrs Amanda	3095.64	0.00
2011.06.01	2011.06.01	25584141-M-BSFIN-Mrs Amanda	45.00	0.00

Received * Amount * Code *

[Back](#) [Report](#)

This page will also display the account number from which the money was deducted. It will also reflect the Received Date, the Amount and the Code: whether it was Accepted or Unpaid. The amount of R3095.64 can be further split to reflect a breakdown of how this amount was made up:

Breakdown

Previous Show All 13 Next

Section	Description	VAT	Premium Including VAT
002	Houseowners	48.50	394.91
004	Household goods	39.45	321.24
020	Personal Accident	24.21	197.13
031	All Risks	34.19	278.38
053	Personal Liability	0.74	6.05
060	Motor	206.82	1684.13
062	Motorcycle	7.69	62.62
100	Legal Costs	0.91	7.37
118	Bereavement Expenses	5.41	44.07
121	Sasria non motor	0.86	7.02
122	Sasria Motor	0.74	6.00
123	Hospital Cash	29.78	242.52
PF	Policy Fee	0.92	7.50
Total		400.22	3,258.94

[Back](#)
[Report](#)
[Back to Finance Summary](#)

All the screens have a

- BACK Button, this will return them to the previous screen/page
- Report Function – This will generate the information into a PDF report for record purposes or for onward transmission to the client.

The last Page has a Back to Finance Summary, returning the user to the first Finance Screen.

Additional Information – Claims

This will display the claims history for the client in question.

Claim No	<input type="text"/>	Client Surname	<input type="text"/>	
Policy No	<input type="text" value="25584141"/>	Client ID	<input type="text"/>	Find
Case No	<input type="text"/>	Client Vehicle Reg No	<input type="text"/>	
Incident date	<input type="text"/>	Natis No	<input type="text"/>	
Broker Reference No	<input type="text"/>	Chassis / VIN No	<input type="text"/>	
Status	<input type="text" value=""/>	Old Claim No	<input type="text"/>	
Agent No	<input type="text"/>			

[Search](#)
[Clear](#)
[Report](#)

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Name	Policy No	Claim No	Case No	Incident Date	Description	Section	Status	Handling Branch	Handler	Incurred Amount
Amanda	25584141	120550138	952668	15.08.2011	JU - test	060	Registered	Pg Glass	PGGLASS	5,000.00
Amanda	25584141	120549639	951805	04.08.2011	JO - aaaa	060	Registered	Online Glass Processing Branch	GLASFIT	500.00
Amanda	25584141	120549638	951804	04.08.2011	JO - aaaaaa	060	Registered	Online Glass Processing Branch	GLASFIT	100.00
Amanda	25584141	120538631	939855	17.05.2011	HII - Motor - WFJ931GP	060	Registered	National Call Centre	KMOGOTL1	325.00
Amanda	25584141	120324534	736632	28.08.2010	JX - Motor - CYY986GP	060	Finalized	Johannesburg Stolen Recovered Unit	HMTHETHW	16,051.00

If further detail is required regarding a particular claim, click on the claim you wish to view.




Claims Header Detail will open

Claim Header Details

Claim No	120324534	Suburb Of Loss	
Policy No	25584141	Status	Finalized
Policy Status	P	Informer Type	Broker
Policy Year	5	Contact person	
Notification Date	30.08.2010	Contact no	
Notification Type	Motor	User ID	NMTHETHW
Incident Date	28.08.2010	Client Name	Amanda

Item	Cover	Sum Insured	Excess	Peril	Claim Description	Case No	Branch	Total Claims Cost	Outstanding Amount	Recovery/Salvage
060 CYY986GP	COMP	10,000	0	Theft	VEHICLE STOLEN	736632	Johannesburg Stolen Recovered Unit	16,051.00	0.00	0



[Back](#)
[Report](#)
[Claims Log](#)
[Upload Documents](#)
[View Documents](#)

-  **Back Button** – Returns user to previous screen
-  **Report Button** - Will populate the displayed information into a PDF document.
-  **Claims Log** - Users can follow the status of the claim, based on logs made by the claims handler, as indicated below.

Previous 1-10 of 19 Next 9

Created Date	User ID	Description
10.12.2010	NNKOSI	Status Changed from Re-Opened to Finalized
10.12.2010	NNKOSI	Dereg complete returned to file and boxed FC 4.5.NTOMBI
06.12.2010	VNALUD E	Status Changed from Finalized to Re-Opened
28.10.2010	TIABCL 01	Claim case is finalized by batch
28.10.2010	TIABCL 01	Status Changed from Open to Closed
28.10.2010	PSMIKA	Claim Branch transferred from JX to JM
28.10.2010	psmika	Gave deregistration certificate to Pleasure to batch.
28.10.2010	psmika	Gave deregistration certificate to Pleasure to batch.
27.10.2010	psmika	Kindly forward bank details so we can process payment.
30.09.2010	psmika	We have added R1090 into the settlement and total comes to R10790, as we cannot pay more than the sum insured we will settle as per sum insured subject to management's approval. Kindly note that we still await the recent registration certificate to proceed, all documents sent are without same.

[Back](#) [Report](#)

-  **Upload Documents** - User has the ability to upload supporting documents, attaching to and forming part of the claim, like an invoices, NATIS Paper, and/or claim form etc
-  **View Documents** – Allows user the ability to view, previously uploaded documents.

- When the user has selected a particular claim to view in more detail, the information detailed under the heading TOTAL CLAIMS COST, is noted in a different colour to the rest of the fields, as this is a [hyperlink](#).

Claim Header Details

Claim No	120324534	Suburb Of Loss	
Policy No	25584141	Status	Finalized
Policy Status	P	Informer Type	Broker
Policy Year	5	Contact person	
Notification Date	30.08.2010	Contact no	
Notification Type	Motor	User ID	NMTHETHW
Incident Date	28.08.2010	Client Name	Amanda

Item	Cover	Sum Insured	Excess	Peril	Claim Description	Case No	Branch	Total Claims Cost	Outstanding Amount	Recovery/Savage
060 CYY986GP	COMP	10,000	0	Theft	VEHICLE STOLEN	736632	Johannesburg Stolen Recovered Unit	16,051.00	0.00	0

[Back](#)
[Report](#)
[Claims Log](#)
[Upload Documents](#)
[View Documents](#)

- Total Claims Cost - By selecting this monetary field, the user is navigated to the [Claim Transaction Detail](#) screen, which will reflect how the claim payment was made up.

Claim Transaction Detail

Claim No	120324534	Suburb Of Loss	
Policy No	25584141	Status	Finalized
Policy Status	P	Informer Type	Broker
Policy Year	5	Contact person	
Notification Date	30.08.2010	Contact no	
Notification Type	Motor	User ID	NMTHETHW
Incident Date	28.08.2010	Client Name	Amanda

Payer/Payee	Role	Trans Date	Payment Method	Payment Status	Amount
Amanda	Policy Holder	2010.10.28	EFT	Paid	-10000.00
IMPERIAL CAR RENTAL EUROPCAR	Service Supplier	2010.10.14	EFT	Paid	-5795.00

[Back](#)
[Report](#)
[Back to Claims Summary](#)

Once again user has the following options:

- [Back](#) - Returns user to the previous screen
- [Report](#) - Will populate the displayed information into a PDF document.
- [Back to Claims Summary](#) - Will return user to the Claims Summary Page

Additional Information – Loss Ratio

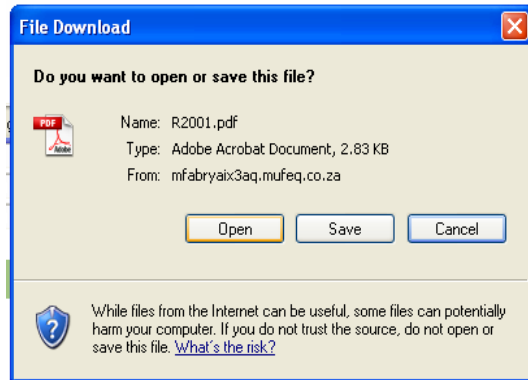
To view the individual loss ratio of the client, select the loss ratio link, the following screen will populate, select the period you wish to view and select SHOW LOSS RATIO

Loss Ratio Enquiry

Period

Premium

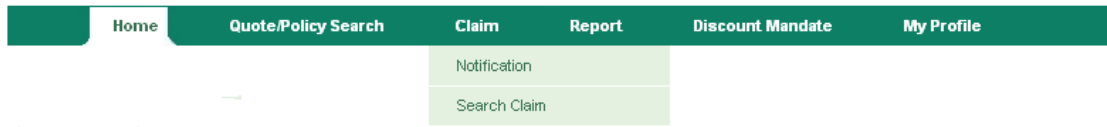
The File Download screen will open. Select your option.





The client's loss ratio will then display as follows:

Clients	Policies	Sections	Period	Premium	Claims	Loss Ratio	No Of Claims
10101411 - NY			07/12/2004 to 10/08/2010	18346.25	15396.78	83.92	4
	15960162		07/12/2004 to 10/08/2010	18346.25	15396.78	83.92	4
			07/12/2004 to 06/12/2005	2749.92	0	0	1
			07/12/2005 to 06/12/2006	3152.32	0	0	0
			07/12/2006 to 06/12/2007	2955	0	0	0
			07/12/2007 to 06/12/2008	2924.17	15014.88	513.47	2
			07/12/2008 to 06/12/2009	3545.04	0	0	0
			07/12/2009 to 10/08/2010	3019.8	381.9	12.65	1
		Houseowners	07/12/2004 to 10/08/2010	17347.74	15396.78	88.75	4
			07/12/2004 to 06/12/2005	2489.19	0	0	1
			07/12/2005 to 06/12/2006	2848.8	0	0	0
			07/12/2006 to 06/12/2007	2629.68	0	0	0
			07/12/2007 to 06/12/2008	2815.23	15014.88	533.34	2
			07/12/2008 to 06/12/2009	3545.04	0	0	0
			07/12/2009 to 10/08/2010	3019.8	381.9	12.65	1
		Motor	07/12/2004 to 06/12/2008	998.51	0	0	0

8) Claim TAB



The claim TAB is made up of

-  Notifications
-  Search Claim

By selecting the Notification Option user is navigated to the following screen

REGISTER CLAIM NOTIFICATION

This allows the user to Notify M&F of a potential PERSONAL claim only. This is not a claim registration function, but purely a notification function. Questions marked with an orange * asterisk are compulsory. Notification Type is made up of three options:

If Non Motor is selected an additional question will appear on the screen, allowing the user to indicate if the claim should be treated as a Fast Track Claim.

If the Gross Total of the claim (incl. Excess) is equal to or less than R 10,000 select the tick box in order to initiate the Fast Track Claim Process

The UPLAOD DOCUMENT Button will remain greyed out until such time as the claim has been notified, as documents can only be uplifted against an actual reference number.

Once all relative fields have been completed, user will select SUBMIT.

Screen will refresh and a M&F Reference number will be allocated to the claim with a message as indicated below.

Register Claim Notification

Your Claims has been successfully submitted. A Mutual and Federal claim Negotiator will contact you shortly. Please use the M&F reference number for future communication.

M&F Reference Number	120027833
Broker Reference Number	1200
Notification Date	12.03.2012
Incident Date	01.03.2012
Policy Number	18809165
Client Name	B KPAGH
Notification Type	Non - motor
Informer Type	Broker
Contact person	011
Contact no	011
Suburb Of Loss	Reigerpark
Description Of Loss	Lost cell phone

If the Gross Total of the claim (incl. Excess) is equal to or less than R 10,000 select the tick box in order to initiate the Fast Track Claim Process

Your Claims has been successfully submitted. A Mutual and Federal claim Negotiator will contact you shortly. Please use the [M&F reference number](#) for future communication.

Upload Documents Button is now enabled, allowing the user, to attach any relevant supporting documentation relating to the Notified claim.

Home Quote/Policy Search Claim Report Discount Mandate My Profile

Notification

Search Claim

SEARCH CLAIM

Following Screen is displayed

Search Claim And Notification

Claim No	<input type="text"/>	Client Surname	<input type="text"/>	<input type="button" value="Find"/>
Policy No	<input type="text"/>	Client ID	<input type="text"/>	
Case No	<input type="text"/>	Client Vehicle Reg No	<input type="text"/>	
Incident date	<input type="text"/>	Natis No	<input type="text"/>	
Broker Reference No	<input type="text"/>	Chassis / VIN No	<input type="text"/>	
Status	<input type="text"/>	Old Claim No	<input type="text"/>	
Agent No	<input type="text"/>			

Name	Policy No	Claim No	Case No	Incident Date	Description	Section	Status	Handling Branch	Handler	Incurred Amount
No records found										





User can search for a claim number in isolation by inputting the claim number, or user can search for all claims for a particular client by inputting the policy number.

Refer Point 7, Additional Information – Claims, for breakdown of claims costs, Claims logs etc.

9) Report TAB

Home	Quote/Policy Search	Claim	Report	My Profile
			Daily Unpaid Report	
			Broker Loss Ratio Report	
			Client Detail Report	
			Commission Statements	

The Report Function is found on the Main Heading and covers the following:

-  Daily Unpaid Report
-  Broker Loss Ratio Report
-  Client Detail Report
-  Commissions (User specific)

This information is **Broker** Specific.

DAILY UNPAID REPORT



Daily Unpaid Report

Agent Number

Date

Select the agency number you wish to view by clicking on the dropdown arrow.

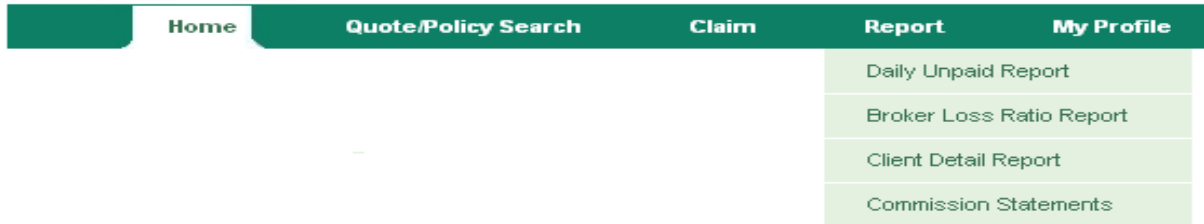
Select a date to view if there are any "Unpays" identified for this day.

-  If an Unpaid Premium(s) is/are found, a PDF report will open with details.
-  If no Unpaid Premiums are found for that date, the system will highlight that no document has been found.

This report should be accessed daily and users should always work one day behind the current date. In other words if you are logged onto **mf** online on the 22 August 2011 and access the report, the bank may not have advised us yet of Unpays for that day, so we suggest you use the previous date, 21 August 2011.



Please note this is not a running total of all "Unpays" over a selected time period, but a daily look up facility. As MUTUAL & FEDERAL is now offering multiple strike dates, premiums can be returned at different times in a month, so we produce a Daily Unpaid Report, as and when we receive the information from the various banks.



BROKER LOSS RATIO PORTFOLIO RESULTS

Broker Portfolio Results

Agent Number *

Result Type Personal and Commercial Combined per Policy
 Personal Portfolio Results per Section

Select the agency number you wish to view, if more than one Agency Number, a result will need to be done for each Agent Number.

Select the **Result Type**

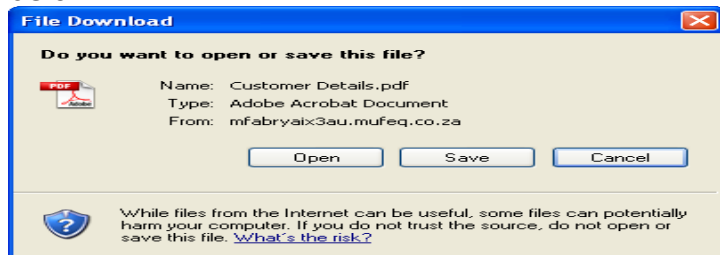
-  Personal and Commercial Combined per Policy
-  Personal Portfolio Result per Section

Select **SHOW REORT** Button and the information will open in a PDF report.



CLIENT DETAIL REPORT

This takes a couple of seconds and will produce a PDF Document as indicated below.



This Report will produce a list of all Customers Personal Contact Details (Active and Cancelled) as indicated by the headings below.

User Name

Customer Details

Initial	Surname	P O Box	Work Phone	Cell Phone	Home Phone	Email Address	Date of Birth
---------	---------	---------	------------	------------	------------	---------------	---------------

The information displayed here is a handy tool to carry with you with all your clients contact details, the information displayed here is the latest information we have on file.

Home	Quote/Policy Search	Claim	Report	My Profile
			Daily Unpaid Report	
			Broker Loss Ratio Report	
			Client Detail Report	
			Commission Statements	

COMMISSION REPORT (Profile driven only, not available to all users, subject to special access)

By selecting this option, user is navigated to the below screen. The email address of the user will automatically be displayed in the email address column. (The address can be changed to any email address)

From the dropdown menu, select the "Agent Number" you wish to view. (User may have more than one agent number attached to their User ID/Profile). Once user has selected the Agent Number they wish to view, select LIST REPORTS.

Commission Statements Results

Agent Number	<input type="text"/>	Email Address	jack@insurancebrokers.co.za
Creation Date	View Document	Email Document	
No documents were found.			

[Back](#) [List Reports](#)

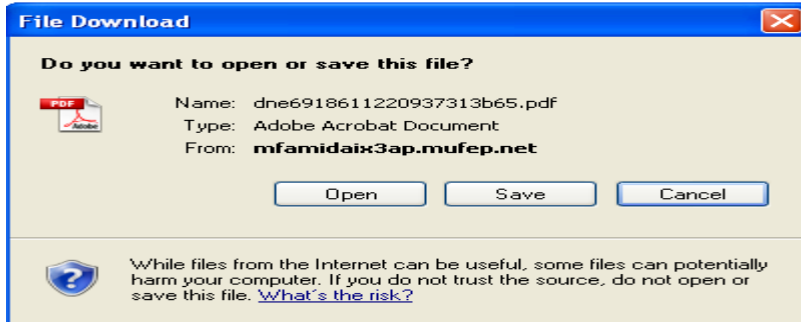
A list of Commission statements will be displayed as indicated below. This is divided into View Document or E-Mail Document

Commission Statements Results

Agent Number	Insurance Brokers	Email Address	jack@insurancebrokers.co.za
Creation Date	View Document	Email Document	
2012-02-01	Commission Statement dated 27/01/2012	Commission Statement dated 27/01/2012	
2012-01-05	Commission Statement dated 28/12/2011	Commission Statement dated 28/12/2011	
2011-12-01	Commission Statement dated 28/11/2011	Commission Statement dated 28/11/2011	
2011-11-03	Commission Statement dated 28/10/2011	Commission Statement dated 28/10/2011	
2011-10-06	Commission Statement dated 28/09/2011	Commission Statement dated 28/09/2011	

Under View Document Heading, user can select, by clicking on the month he wishes to VIEW.

The following PDF File Download will open and user can select Open or SAVE



Information will be displayed accordingly.

MUTUAL & FEDERAL										M&F VAT REG. NO. 446010115	Page No. 16
										Branch Details	Seq. No. 40268
										PRETORIA PO BOX 39864 FAERIE GLEN	
										0043	
										Tel 012 999	
										Fax 012 999	
INSURANCE BROKERS (PTY) P O BOX 95 WATERKLOOF										Tax Invoice Commission Statement	
0145 Credit Controller : J DICKS										Accounting Date 01/02/2012	
Agent Code CRI/Agent Type VAT Number A/CREDIT										Transactions processed of the company's head office after this date are excluded.	
										Should you wish to query any of these entries please contact your branch.	
Insured name Policy Number Section Codes Split	Trans ID	Entry Type	Product Type	Effective Date	Premium Amount (VAT incl.)	*Commission	VAT	BSF	PAYE		
BROWN I	206828711	RENEWAL	ALLSA	201202	1722.29	156.29	25.34	50.00	0.00		
121 3.11@ 7.30%- 0.23	122 2.00@ 7.40%- 0.15										
060 501.56@12.50%- 62.70	031 290.09@20.00%- 59.01										
053 6.07@20.00%- 1.21	004 919.46@20.00%- 183.99										
	206828711	RENEWAL		201202	0.00	0.00	6.14	50.00	0.00		
						306.19	43.74	50.00	0.00		
BUCKLAND J	206807481	RENEWAL	ALLSA	201202	413.21	82.27	10.11	0.00	0.00		
31404	121 3.00@ 7.60%- 0.23										
004 404.14@20.00%- 80.83											
053 6.07@20.00%- 1.21											
	206807481	RENEWAL		201202	0.00	0.00	6.14	50.00	0.00		
						82.27	16.25	50.00	0.00		
BURSTON L	206791012	RENEWAL	ALLSA	201202	3207.81	638.84	78.46	0.00	0.00		
1045	020 1.95@20.00%- 0.39										
020 21.75@ 7.40%- 1.63	053 6.05@20.00%- 1.21										
052 2557.67@20.00%- 511.53	004 620.39@20.00%- 124.08										
	206791012	RENEWAL		201202	0.00	0.00	6.14	50.00	0.00		
						638.84	84.60	50.00	0.00		

Trans ID: R=Renewal, E=Endorsement, B=Broker Service Fee, N=New Business, C=Cancellation, L=Lapse, P=Pro-forma
*Non registered Vendors - Your commission is calculated on the premium paid less VAT.

Alternatively, user can click, under the heading Email Document, the month he wishes to have emailed.

User will receive a note, advising them, that the document has been emailed and it will confirm the email address it will be sent to.

Information

The report has been e-mailed to amanda.theobald@muf.co.za

Commission Statements Results

Agent Number Insurance Brokers (Pty) L Email Address amanda.theobald@muf.co.za

Creation Date	View Document	Email Document
2012-02-01	Commission Statement dated 27/01/2012	Commission Statement dated 27/01/2012
2012-01-05	Commission Statement dated 28/12/2011	Commission Statement dated 28/12/2011
2011-12-01	Commission Statement dated 28/11/2011	Commission Statement dated 28/11/2011
2011-11-03	Commission Statement dated 28/10/2011	Commission Statement dated 28/10/2011
2011-10-06	Commission Statement dated 28/09/2011	Commission Statement dated 28/09/2011

User will need to follow these steps, for each Agent Number (If more than one)

10) Discount Mandate TAB



By Clicking on the Discount Mandate Tab, the following screen will open, indicating the mandate for this Portfolio, if more than one Agent Number, all mandates at Agent Number Level will be displayed!

Discount Mandates					
Agent Number	Agency Name	Product Line	Mandated Average Discount	Mandated Maximum Cap	Calculated Average Discount
230	INS BROKERS (PTY) LTD	Motor (060)	30	50	25.1
230	INS BROKERS (PTY) LTD	All risks (031)	11	11	14.7
230	INS BROKERS (PTY) LTD	Buildings (002)	16	16	17
230	INS BROKERS (PTY) LTD	Personal computers (089)		0	
230	INS BROKERS (PTY) LTD	Pleasure craft (095)		0	
230	INS BROKERS (PTY) LTD	Household goods (004)	20	20	20.9
230	INS BROKERS (PTY) LTD	Trailer/carevan (066)		0	
230	INS BROKERS (PTY) LTD	Motorcycle (062)	25	50	24

[Close](#)

The column definitions are indicated below

Mandated Average Discount	Average discount assigned to each intermediary. This differs by intermediary and by section. This is the discount that the intermediary would need to average (maintain) over his (section specific) portfolio.
Mandated Maximum Cap	The maximum discount assigned to each intermediary. This applies to each item and differs by section. An intermediary can apply this discount to items in his portfolio subject to maintaining the average discount on his portfolio.
Calculated Average Discount	The average discount calculated on a weekly basis to determine how close the intermediary is to his/her Mandated Average Discount. The average is calculated on a premium weighted basis.

Why DMA?

In an effort to reduce the amount of referrals which are discount related, pre-determined mandates have been allocated based on the calculations above. This will allow for a quicker turnaround as no discount referrals will be created. Normal Business referrals will continue. E.g: Holiday-homes.

How DMA works?

Day to Day transactions via **mf online** will be conducted in the normal manner.

New Quote/New Item - If a New Business quote or if a New Item is added, any discount captured, which is in excess of the Brokers mandated discount, will be "capped" at the maximum discount, as displayed via the DMA table.

e.g.: Mandate 10% - User inserts 20%

Warning

- Maximum discount exceeded. - The 20% requested exceeds your mandate of 10%. Discount will be amended to 10%. Please continue transaction as normal.

The 20% discount, captured in the discount field, will be automatically changed to the mandated discount of 10%, with no option of selecting a higher amount.

Existing Item - Existing discounts will not be affected by the mandated discounts, user will be able to reduce the discount amount but not exceed the existing amount.

e.g: Current discount 10% - Mandate 5% - User Inserts 30%

Warning

- Maximum discount exceeded. - The 30% requested exceeds the broker's mandate or current discount. Discount will be amended to 10%. Please continue transaction as normal.

The 30% discount, captured in the discount field, will be automatically adjusted back to the existing discount of 10%. Discount will not be lowered to the mandated amount of 5%. There is no option of selecting a higher amount.

Higher Mandates required

If the intermediary is unhappy with the mandated discount offered, the intermediary will be allowed to contact their BDC, and if there is valid reason that warrants a discount higher than the mandate, this will be considered outside of the DMA, as signed off by a Branch Manager.

Via **mf online** user has two options available if they are not satisfied with the mandated discount.

- ✚ Accept the mandated discount and complete the transaction thereby generating a schedule, negotiate and await authorisation from BDC/Regional manager for an increased discount, whereby a second transaction will be done, by an internal staff member, which will generate an **Additional** schedule or

- ✚ Broker can cancel their transaction, negotiate and await authorization from the BDC/Regional manager for an increased discount, wide of their DMA table. Once authorization is given, this transaction will be done by an internal staff member. In this scenario only **ONE** schedule is generated.

Discount Mandate Authority Warning Email

Warning emails will be sent regarding the Discount Mandate Authority an example is included below:

From: tia_noreply@mf.co.za [mailto:tia_noreply@mf.co.za]
Sent: 15 February 2012 11:49 AM
To: Mr Broker
Subject: Discount Mandate Authority Warning



Agent number: 1234567X
Agent name: XYZ Insurance Brokers

Dear Sir/Madam|

As per the table below your calculated average discount for one or more of the sections is within 2.5% of your mandated average discount. Please note that should your calculated average discount exceed your mandated average discount then you will not be able to give the maximum discount (given in the table below) for that specific section.

Section	Calculated Average Discount	Mandated Average Discount	Mandated Maximum Cap	Difference between CAD and MAD
002 Houseowners	11.5%	5.0%	5.0%	6.5%
004 Household Goods	18.9%	16.7%	16.7%	2.2%
031 All Risks	10.6%	11.0%	22.0%	-0.4%
060 Motor	26.3%	16.4%	16.4%	9.9%
062 Motorcycle	11.6%	25.0%	50.0%	-13.4%

Kind Regards,

Mutual & Federal