



# Seamless.Insure

**Manual name:**

**User Manual**

Version: *May 2021*

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## 1. Introduction

The purpose of this guide is to enable internal users to understand the following with respect to the Seamless:

- Key features of solution
- The behaviour and function of screens in Seamless system

Seamless is a system assisting and automating tasks that you run in your business.

Seamless is highly configurable in terms of user roles, permissions and feature modules.

Internal and External users are able to access the system and their levels of authorisation are determined by your system administrator.

## 2. Seamless Screen Descriptions

Each screen description will contain:

- **Main Function**

Overview description which explains the purpose the web page fulfills within Seamless.

- **Screenshot**

The screenshot, or screenshots, will display the features contained within a certain webpage.

- **How to Find**

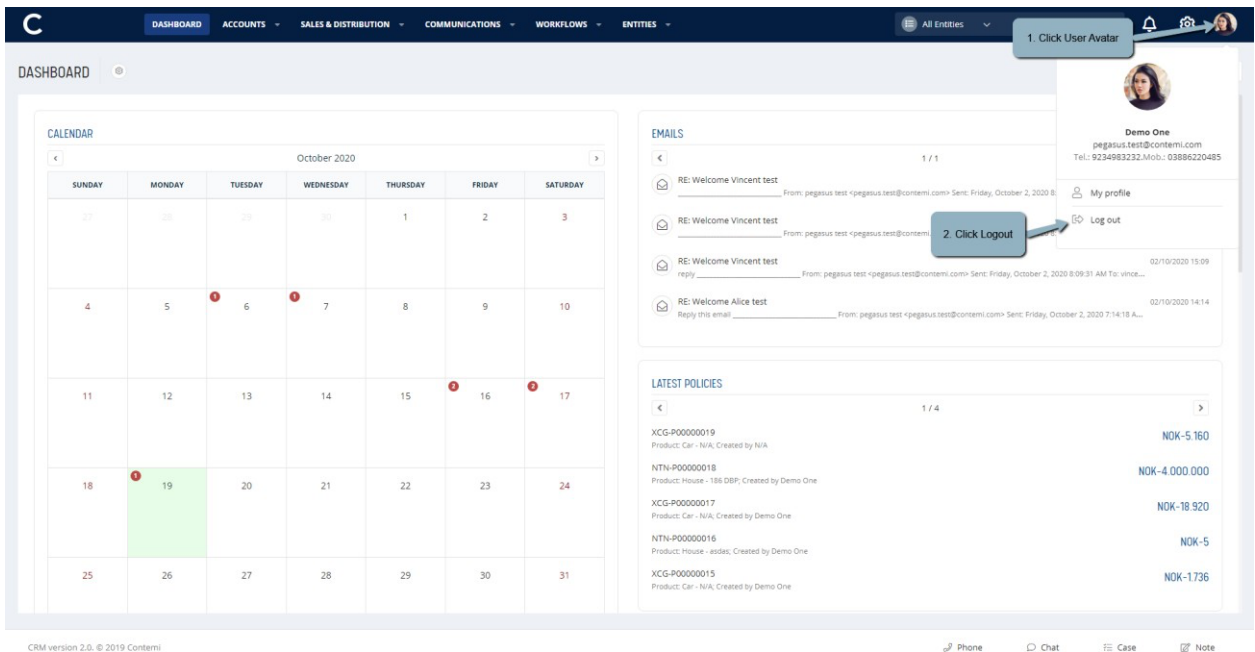
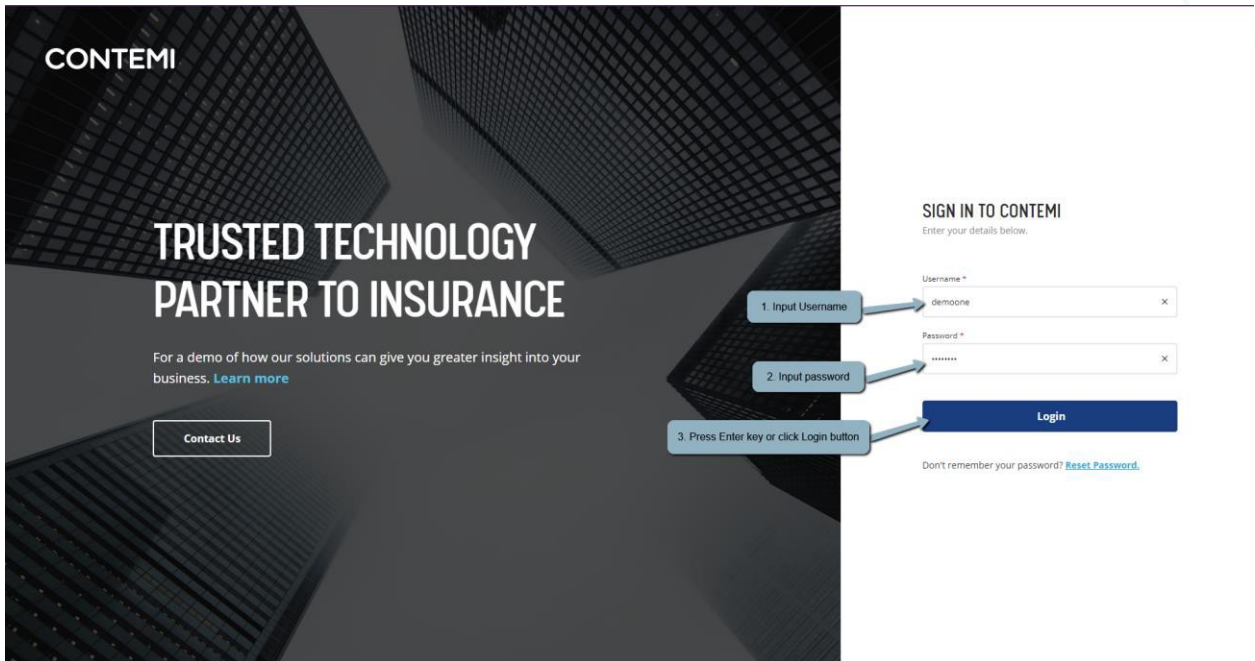
A short navigation statement that explains how a user can navigate to the web page being described.

- **Description**

Each functional field on the webpage will have a brief description outlining what purpose the field serves, and what format it supports.

## 2.1 Log in / Log out

### SCREENSHOT



### MAIN FUNCTION

The Login/Logout function allows authorized users to access and leave the system, the actions are logged as events which can be found in the Audit Logs page.

## HOW TO FIND

- Enter the URL for the system into the browser. The Login screen will appear. All users will see the same screen before logging in.
- In order to enter the system, input your login credential into Username and Password and press Enter key / hit "Login" button.
- In order to logout, click the user avatar at the top right corner of the screen, hit "Logout".

## FIELD DESCRIPTION

### Username

This is a mandatory field. Usernames are unique and should not have space in between the characters.

### Password

This is a mandatory field. The input is not visible as readable characters. Each character is displayed as a dot.

### Login button

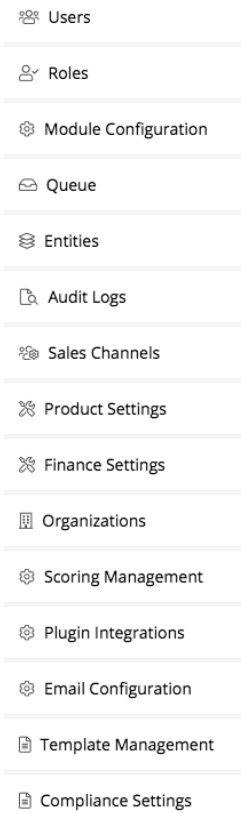
Hitting this button would send the credential you have input to the system. If it is valid, you can login successfully. If it is not valid, a red error message appears at the bottom right corner of the screen for around ten seconds saying your login credential is not valid.

### Reset password

The function is not implemented yet, but it is supposed to assist the user to submit a password reset request to the system. The request is then verified by the system, if it is a valid request, the user should be able to get/set a new password.

## 2.2 Administration/Management

When clicking on the cogwheel icon on the right-hand side, the following menu should be displayed.



- [Users](#)
- [Roles](#)
- Module configuration
- [Queue](#)
- [Entities](#)
- [Audit logs](#)
- [Sales channels](#)
- [Product settings](#)
- [Finance settings](#)
- Organization
- Scoring Management
- Plugin Integrations
- Template Management
- Compliance Settings

## 2.2.1 Roles and Permissions

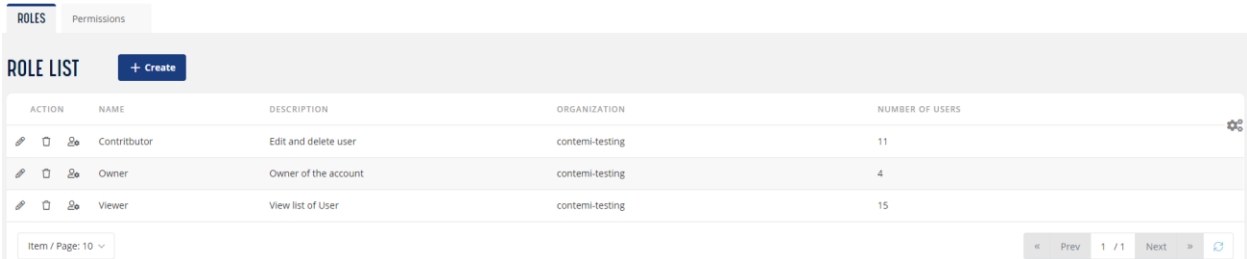
Role is a set of permissions that define which functionality that users of this role can perform in the system.










Users can access the roles list by clicking on the item “Roles” in the cogwheel icon.

A new screen would be opened with two tabs: “Role” and “Permissions”




### 2.2.1.1 Role

Role list displays all roles that exist in the system.



| ACTION  | NAME        | DESCRIPTION          | ORGANIZATION    | NUMBER OF USERS |
|---|-------------|----------------------|-----------------|-----------------|
|    | Contributor | Edit and delete user | contemi-testing | 11              |
|    | Owner       | Owner of the account | contemi-testing | 4               |
|    | Viewer      | View list of User    | contemi-testing | 15              |

Information on roles list:

- **Action:** available actions on the current role
  -  **Edit:** users can modify the description of roles, details in section [Edit role](#)
  -  **Delete:** users can delete roles, details in section [Delete role](#)
  -  **Role Settings:** users can view which permissions that the current role include, details in section [Role settings](#)
- **Name:** name of role
- **Description:** short description on which functionality that users can perform with the current role
- **Organization:** name of organization that the current role belongs to
- **Number of users:** display the number of users who are assigned to the current role

#### 2.2.1.1.1 Create a new role:

Clicking on the button “Create”, which is located next to the title “Role list”, popup to create a new role should display:

- Name is required in order to create a new role
- “Description” can be a short explanation on what is the current role, and what the role does



## CREATE NEW ROLE



### ROLE

Name \*

Description

After creating the new role successfully, new roles will be visible in the role list.

#### 2.2.1.1.2 Edit role

In the role list, clicking on the action icon "Edit" would trigger the modification of the selected role.

- Only the role description is editable.

## EDIT ROLE



### ROLE


Name \*

Viewer

Description

View list of User



 Save

Cancel

After saving changes, updated values will be shown in the role list.

#### 2.2.1.1.3 Delete role

## CONFIRMATION



Do you want to delete role Retailer?

Delete

No

Clicking on the action icon “Delete” would open a little confirmation popup. If users still would like to delete, clicking on the button “Confirm” would trigger the delete action.

- If the current role is not assigned to any users, the role will be deleted. The success message would be displayed.

If there is any users that are assigned to the current role, a confirmation popup will display as below:

# CONFIRMATION



This role is currently assigned to at least one user. Do you want to continue deleting it?

Save

Cancel

- By clicking the button “Delete”:
  - The selected role would be removed from the assigned users
  - The selected role would be deleted
  - The selected role is no longer available in the role list

## 2.2.1.1.4 Role settings

| ACTION | NAME        | DESCRIPTION          | ORGANIZATION    | NUMBER OF USERS |
|--------|-------------|----------------------|-----------------|-----------------|
|        | Contributor | Edit and delete user | contemi-testing | 14              |
|        | Owner       | Owner of the account | contemi-testing | 4               |
|        | Viewer      | View list of User    | contemi-testing | 15              |

| MODULES                 | PRODUCT BUILDER                     |
|-------------------------|-------------------------------------|
| <b>Pipelines</b>        | <input type="checkbox"/>            |
| View pipelines          | <input type="checkbox"/>            |
| Create pipelines        | <input type="checkbox"/>            |
| Update pipelines        | <input type="checkbox"/>            |
| Delete pipelines        | <input type="checkbox"/>            |
| <b>Quotes</b>           | <input type="checkbox"/>            |
| Accept backdated quotes | <input type="checkbox"/>            |
| Sell quotes             | <input type="checkbox"/>            |
| Discard quotes          | <input type="checkbox"/>            |
| View quotes             | <input checked="" type="checkbox"/> |

Select user  Assign

### ASSIGNED USERS

| ACTION                   | USERNAME                  | FULL NAME      |
|--------------------------|---------------------------|----------------|
| <input type="checkbox"/> | mich@contemi-testing      | Michelle Huynh |
| <input type="checkbox"/> | long.test@contemi-testing | long test      |

Clicking on the button “Role settings” will open up a new tab, with the tab name is the role name.

Page “Role settings” should include:

- On the left hand side: all permissions and those permissions that belong to the current role
- On the right hand side: users that are assigned to

the current role The following actions can be performed

on the current page:

- Modifying permissions: by check/uncheck on the corresponding checkbox of a particular permissions, users are add/remove that permission to/from the current role
- Assigning users: users can assign/unassign users to/from the current role. Search functionality would help to search users by "Display name".

### 2.2.1.2 Permissions

Below screen would display all permissions in rows and all available roles in columns:


- If permissions are available for a specific role, a corresponding checkbox should be selected. Otherwise, it should be unchecked.
- Users would be able to compare permissions among roles and make modifications on screen "Permissions" as a whole.

| ROLES                   | PERMISSIONS | OWNER                               | SALES                               | SALES LEAD                          | BROKER                              | PRODUCT BUILDER                     |
|-------------------------|-------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| <b>Modules</b>          |             |                                     |                                     |                                     |                                     |                                     |
| <b>Pipelines</b>        |             | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| View pipelines          |             | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Create pipelines        |             | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Update pipelines        |             | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Delete pipelines        |             | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| <b>Quotes</b>           |             | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Accept backdated quotes |             | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Sell quotes             |             | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Discard quotes          |             | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| View quotes             |             | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

### 2.2.2 User

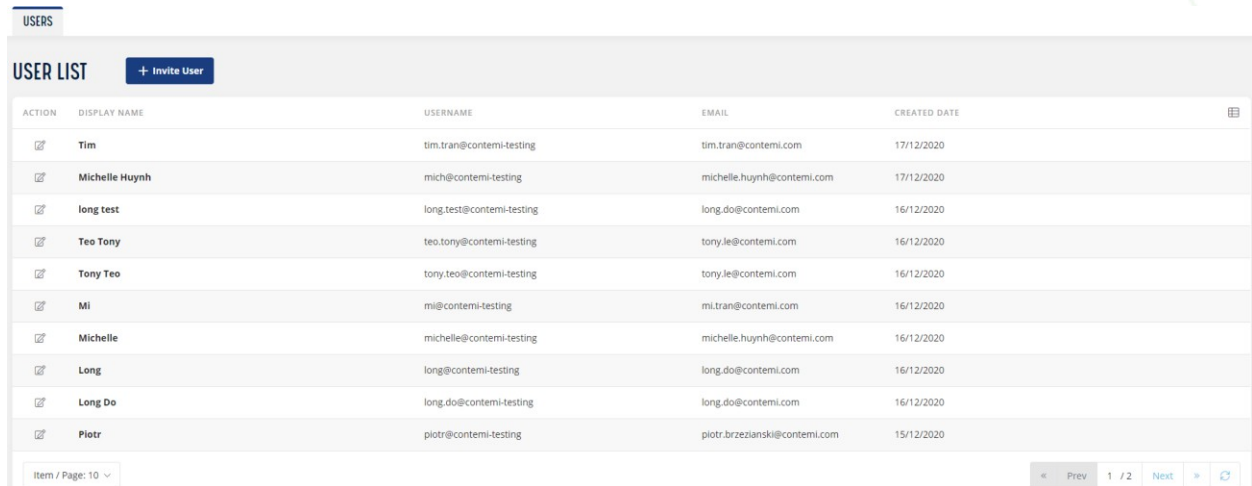
Users module is used to manage users in the system. In order to access Seamless, end-users must have an account/a username, which should be created by tenant owners, or any users that have permissions to manage users.

Clicking on the menu "Users" would open up the screen "User list", as shown below. Information on user list:

- **Action:** available action on the current user:
  -  **Edit.** users can modify the current user's information, except username - details in section [Edit users](#)
- **Username:** registered username of the current user, which is used to login to Seamless.
  - Username only accepts letters (a-z), number (0-9), underscore(\_), dash(-), and period (.)

**Display name:** name of the current user that would display in user profile

- **Email:** registered email of the current user
- **Created date:** the date when the current user is created



The screenshot shows a web interface for managing users. At the top, there is a tab labeled 'USERS' and a section titled 'USER LIST' with a '+ Invite User' button. Below this is a table with the following columns: ACTION, DISPLAY NAME, USERNAME, EMAIL, and CREATED DATE. The table contains 11 rows of user data. At the bottom left, there is a pagination control showing 'Item / Page: 10'. At the bottom right, there are navigation buttons: '< Prev', '1 / 2', 'Next >', and a refresh icon.

| ACTION | DISPLAY NAME   | USERNAME                  | EMAIL                         | CREATED DATE |
|--------|----------------|---------------------------|-------------------------------|--------------|
|        | Tim            | tim.tran@contemi-testing  | tim.tran@contemi.com          | 17/12/2020   |
|        | Michelle Huynh | mich@contemi-testing      | michelle.huynh@contemi.com    | 17/12/2020   |
|        | long test      | long.test@contemi-testing | long.do@contemi.com           | 16/12/2020   |
|        | Teo Tony       | teo.tony@contemi-testing  | tony.le@contemi.com           | 16/12/2020   |
|        | Tony Teo       | tony.teo@contemi-testing  | tony.le@contemi.com           | 16/12/2020   |
|        | Mi             | mi@contemi-testing        | mi.tran@contemi.com           | 16/12/2020   |
|        | Michelle       | michelle@contemi-testing  | michelle.huynh@contemi.com    | 16/12/2020   |
|        | Long           | long@contemi-testing      | long.do@contemi.com           | 16/12/2020   |
|        | Long Do        | long.do@contemi-testing   | long.do@contemi.com           | 16/12/2020   |
|        | Piotr          | piotr@contemi-testing     | piotr.brzezianski@contemi.com | 15/12/2020   |

### 2.2.2.1 Invite new users

Clicking on button “Invite user”, which is located next to the title “User list”, popup to invite user should display:

- Users must fill in required fields to create/invite a new user
- The new user must be assigned to at least one role

## INVITE USER



### USER

Username \*

stefan.heinz



@contemi-testing

Display Name \*

Stefan Heinz

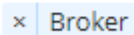


Email \*

stefan.heinz@contemi.com



Assign Role



Broker



Product Builder



Save

Cancel

After saving a new user successfully, an invitation email should be sent to the registered email, as shown below.

Welcome to Seamless!



no-reply@verificationemail.com  
To: Mi Tran

Reply

Reply All

Forward



Mon 21/12/2020 7:08 AM

Welcome to Seamless!

We are happy to inform you that a user has been created for you and you can now log in to Seamless with your username and password.

Please update your password after you have logged in to your account.

- Your username is 'mitran@o2-preview',
- Your temporary password is '0@3akT4K'.

Go to Seamless: <https://app.seamless.insure>.  
Stay updated and get support.

If there is anything you have questions on, or that we can help you with, please contact our Customer Success Manager or send us a request at [support@seamless.insure](mailto:support@seamless.insure). You can also stay updated and get more information through our website or by clicking the links below and follow us in social media channels. We are committed to ensure a seamless experience both for you and your organization. With that, we wish you a pleasant onboarding!

- The invited user should follow the link in the received invitation email.

Login process is provided at [section login](#).

### 2.2.2.2 Edit users

When clicking on the button “Edit”, the following popup should appear and allow the user to modify the following information:

- Display name
- Email
- Assign role

## EDIT USER ×

### USER

Username \*

Display Name \*

×

Email \*

×

Assign Role

×

### 2.2.3 Product settings

Product settings is the place to keep settings that are related to products, quotes, and policies.

In order to access product settings, users should go to the cogwheel on the right side, and choose the menu “Product settings”.

The following page with some settings related to products will be displayed.

## PRODUCT SETTINGS

Quote Validity (Days)

1

Expired Quote Discard Period (Days)

1

Policy Automatic Emails

Quote Email Recipient

Seller's Email

×

Policy Email Recipient

Customer's Email

×

### SALES DISCOUNT LEVELS CONFIGURATION ^

Sales Discount Level 1

0

Sales Discount Level 2

30

Sales Discount Level 3

100

- **Quote validity (days):** the number of days that quotes are valid from the created date. After quote validity period, if quotes are not purchased, they are set to state "Expired".
- **Expired quote discard period (days):** the number of days that the expired quotes will be discarded automatically by the system.
- **Policy automatic emails** check box: if ticked, policy emails are automatically sent out after purchase.
- **Quote email recipient** and **Policy email recipient:** two possible answers, "Seller's Email" and "Customer's Email".
  - If "Seller's Email" is selected, emails are sent to the user who creates the quotes/policies.
  - If "Customer's Email" is selected, the recipient is the customer to whom the quotes/policies belong.
- **Sales discount levels configuration:**
  - **Sales Discount Level 1**
  - **Sales Discount Level 2**



- **Sales Discount Level 3**

These are tied to Sales Discount permissions each of which is for a level.

Sales discount level 1

Allows users to update quote sales discount up to the lowest configured level.

Sales discount level 2

Allows users to update quote sales discount up to the medium configured level.

Sales discount level 3

Allows users to update quote sales discount up to the highest configured level.

For example:

A user has “Sales discount level 2” permission, and the configured value for “level 2” is “30” as in the screenshot above. This user can only input a discount percentage up to 30% during quote acceptance.

|   | ANNUAL PREMIUM    | POLICY PREMIUM    |
|---|-------------------|-------------------|
| Premium excl. Tax   | 245.09 NOK        | 245.09 NOK        |
| Sales discount <input type="text" value="31"/> %:<br>Maximum sales discount can be given is 30. | ---               | ---               |
| Product commission <input type="text" value="42.85"/> %:  | 105.04 NOK        | 105.04 NOK        |
| Sales commission <input type="text" value="12"/> %:   | 42.01 NOK         | 42.01 NOK         |
| Tax   | 0.00 NOK          | 0.00 NOK          |
| <b>Total premium</b>  | <b>392.14 NOK</b> | <b>392.14 NOK</b> |

- Only those users with permission to “Manage product settings” can modify this information.

## PRODUCT SETTINGS

Quote Validity (Days)

Expired Quote Discard Period (Days)

Save

### 2.2.4 Sales Channels

“Sales Channels” is the place where the channels to sell insurance products are defined.

In order to access the sales channel list, users should click on the cogwheel icon, and choose the menu “Sales channels”. Sequentially, the sales channels page will be displayed - as shown below.

SALES CHANNELS

### SALES CHANNEL LIST

+ Add Sales Channel

NAME

Inbound

- **“Add Sales Channel”**: this button should trigger the process to add a new channel.
  - **Name**: Users must define the channel name.
  - **Available products**: display all products that are published, activated, and ready for sales.
    - **The left box**: display products that should currently be sold under the current sales channel.
    - **The right box**: display products that are ready for sales, and can be added to the current sales channel.

## CHANNEL DETAILS

Name

Available Products

Remove ▶◀ Include

Domestic Travel

Test

Travel

Test

All

None

All

None

Back

Save

- Clicking on the sales channel name would open a new tab that should display the details of the selected channel.

SALES CHANNELS **Inbound** ×

## CHANNEL DETAILS

Name  
Inbound

Available Products

Remove ▶      ◀ Include

Travel

Domestic Travel

Test

Test

All      None      All      None

Back      Save

- Only users with permission to “Manage products” can modify information about sales channels.

### 2.2.5 Finance settings


“Finance settings” is where to set up the connection between Seamless and the accounting system that the you are using. After the integration, policy payment/installment should be sent to the integrated accounting system. On the other hand, invoice/receipt of the booking should be recorded in Seamless.

At the moment, Seamless supports the integration with Quickbooks, 24SevenOffice, Tripletex and Business Central. Users must complete below form in order to create the connection. The two first mentioned accounting systems are used as examples.

## FINANCE SETTINGS

Accounting Provider

None  QuickBooks  24SevenOffice

 No credentials are available for this integration.

**Update Credentials**

Reference

Conteml Testing

CONNECTION DETAILS 

INCOME ACCOUNT DETAILS 

HANDLING FEE 

COMMISSION PRODUCT 

**Save**

*Connection details:*

### CONNECTION DETAILS

BaseUrl

https://api.24sevenoffice.com

Realm Id

Client Id

Environment

Date Format

dd.MM.yy

Income account details:

### INCOME ACCOUNT DETAILS

Account Id

Account Name

**Handling fee:**

### HANDLING FEE

Fee Type

Fee Product Id

Fee Product Name

Fee Line Description Text

Refund Product Id

Refund Product Name

Refund Line Description Text

In this section, user can setup the way Admin/Handling fee is charged, Fee Type can be:

- No handling fee
- OneHandlingFeePerPolicy
- HandlingFeePerCustomer

The display name of Handling Fee and Fee Refund can also be changed. They can be found in Policy Payment Schedule section and in Finance systems like QuickBooks and 25SevenOffice.

Commission product:

User can change the display name of commission records in this section. The display names can be found in Finance systems.

Credentials:













For QuickBooks:

For 24SevenOffice:

The connection credential details are encrypted.

## 2.2.1 Organizations

This is the place where all the tenant's organizations are managed.

| ORGANIZATIONS   |                 |                          |
|---|-----------------|--------------------------|
| ORGANIZATION LIST   |                 | <a href="#">+ Create</a> |
| ACTION  | NAME            | DESCRIPTION              |
|   | Broker A        | Ring-fenced broker       |
|   | Broker B        | Ring-fenced broker       |
|   | Broker C        | N/A                      |
|   | Broker D        | N/A                      |
|   | Broker E        | N/A                      |
|   | contemi-testing | Root organization        |

For any tenant, there is only one root (parent) organization which is automatically created when the tenant is created, the name cannot be changed.

The "Create" function creates child organizations.

### ADD ORGANIZATION ×

**ORGANIZATION**

|   |  |
|---|--|
| Name *  | Organization Number                                    |
| <input type="text" value="Enter organization name"/>        | <input type="text" value="Enter organization number"/> |
| Phone Number  | Email  |
| <input type="text" value="Enter phone number"/>             | <input type="text" value="Enter email"/>               |
| Address   | City   |
| <input type="text" value="Enter address"/>                  | <input type="text" value="Enter city"/>                |
| Postcode  |  |
| <input type="text" value="Enter postcode"/>                 |  |
| Description   |  |
| <input type="text" value="Enter organization description"/> |  |

[Save](#) [Cancel](#)



A user can be attached to several organizations. They can also be removed from the organizations later on.

| ACTION | USERNAME                       | FULL NAME         |
|--------|--------------------------------|-------------------|
|        | contemileone                   | contemi leone     |
|        | dhl_long@contemi-testing       | DHL               |
|        | gillianbroker@contemi-testing  | Gillian Broker    |
|        | longcailay@contemi-testing     | Henry             |
|        | joyce.vo@contemi-testing       | Joy Vo            |
|        | keanv@contemi-testing          | Kean Vu           |
|        | michellevn@contemi-testing     | Michelle Broker A |
|        | piotr-broker-a@contemi-testing | Piotr Broker A    |

Parent-organization users can manage data at the tenant scope while child-organization users can only manage data at their organization scope.

Example:

At Contemi-Testing tenant, the root organization is named "Contemi-Testing", and there're child organizations, "Broker-A" and "Broker-B".

Contemi-Testing users can manage all accounts, quotes and policies in the tenant. Broker-A users can only manage those with the organization of "Broker-A".

Broker-B users can only manage those with the organization of "Broker-B".

As for **commissions**, there're three levels of setting:

- **Root Organization**
- **Individual Child Organization**
- **Product**

The setting is reflected during quotation process:

## CREATING QUOTE

Send Document

Questions

QUOTE REF.: 506171 (Quote will be expired in 1 days)

Created Date: 8 minutes ago  
Last Edited date: a few seconds ago

### INSURANCE INFORMATION

Policy Term: 30/05/2021-29/05/2022  
Expiry Date: 31/05/2021

### PREMIUM

### COVER BREAKDOWN

|                             | ANNUAL PREMIUM    | POLICY PREMIUM    |
|-----------------------------|-------------------|-------------------|
| Premium excl. Tax           | 245.09 NOK        | 245.09 NOK        |
| Sales discount 30 %:        | -73.53 NOK        | -73.53 NOK        |
| Product commission 42.85 %: | 0.00 NOK          | 0.00 NOK          |
| Sales commission 12 %:      | 29.41 NOK         | 29.41 NOK         |
| Tax                         | 0.00 NOK          | 0.00 NOK          |
| <b>Total premium</b>        | <b>274.50 NOK</b> | <b>274.50 NOK</b> |

| COVER       | PREMIUM    |
|-------------|------------|
| Work Injury | 274.50 NOK |

If the organization-level commission setting is enabled, it supersedes the product-level one.

## 2.3 Dashboard

### SCREENSHOT

The screenshot displays a CRM dashboard with a dark blue header and a light grey main area. The dashboard is organized into several widgets:

- LATEST QUOTES:** A list of 8 quotes with columns for quote ID, product details, and premium amount. The highest premium is NOK-131,600.
- LATEST POLICIES:** A list of 4 policies with columns for policy ID, product details, and premium amount. The highest premium is NOK-4,000,000.
- CASES:** A list of 3 cases with columns for case ID, assignee, and due date. The highest priority case is 'Car In - [Welcome] Amy L. Oyen'.
- OPPORTUNITIES:** A list of 2 opportunities with columns for opportunity ID, account name, and amount. The highest amount is NOK 3,000.
- EMAILS:** A list of 1 email with columns for email ID, subject, and date. The email is 'RE: Welcome Vincent test'.

The dashboard also includes a navigation menu at the top, a search bar, and a 'CRM version 2.0.' footer.

## MAIN FUNCTION

This is the first landing page that users can see after logging in. It shows the widgets providing quick information that a user needs for his daily tasks. The widgets are configurable.

## HOW TO FIND

After logging in, users are navigated to the Dashboard page.

In addition, users can click on the company logo or “Dashboard” button at the top left corner of the screen.

## HOW TO CREATE A DASHBOARD

1. Click on the Setting icon on the right side of the dashboard page
2. Drag the layout from Configuration popup and drop to the Summary page.
3. There are 5 layouts: 6:6; 4:4:4, 3:3:3:3, 9:3, 8:4

Ex: If you select 6:6 layout for a row, 2 widgets can be added. If you select 4:4:4 layouts, 3 widgets can be added.

4. Drag the widget from Configuration popup and drop in the layout.
5. Click **Save** on Configuration popup.

## 2.4 Accounts

### 2.4.1 Accounts

## MAIN FUNCTION

Use accounts to store information about customers who you do business with. There are two types of accounts: Company and Person.

Company accounts store information about companies. Person accounts store information about individual people.

# SCREENSHOT

ACCOUNTS Martinius T Iversen

### ACCOUNT LIST

[+ Create New Account](#) [Add To Target Group](#) [Import Account](#) [Export Account](#) [Export History](#) [Bulk Edit](#)

| <input type="checkbox"/> | ACTION | NAME                   | SSN/ORG NO. | EMAILS                  | PHONES       | ADDRESSES                   | KAM | STATUS   |
|--------------------------|--------|------------------------|-------------|-------------------------|--------------|-----------------------------|-----|----------|
| <input type="checkbox"/> |        |                        |             |                         |              |                             |     |          |
| <input type="checkbox"/> |        | KK Katinka K Ekeberg   | 15542333688 | katinka@gmail.com       | 464 20 644   | Furulundsgata 168           |     | Customer |
| <input type="checkbox"/> |        | E Edvin J Nyhagen      | 07028735324 | e.nyhagen@gmail.com     | +84981027655 | Johan Castbergs vei 110     |     | Prospect |
| <input type="checkbox"/> |        | P Protekja Ltd         | 582369741   | november_12000@yahoo... | 982 67 537   | Mårveien 233                |     | Customer |
| <input type="checkbox"/> |        | M Martinsen Mining Ltd | 753159426   | hr@martinsenmining.com  | 945 11 388   | Valkyrieplassen 133         |     | Customer |
| <input type="checkbox"/> |        | M Mining Oil Company   | 632145789   | info@miningoil.com      | 957 45 086   | Nesbuveien 181              |     | Customer |
| <input type="checkbox"/> |        | D Dennis E Waage       | 26039035321 | dennis.waage@gmail.com  | N/A          | Aklangveien 111             |     | Prospect |
| <input type="checkbox"/> |        | C Cogent Data.         | 847951236   | info@coindentata.com    | 976 85 252   | Langgata 99                 |     | Prospect |
| <input type="checkbox"/> |        | I Innovation Arch.     | 254136987   | hr@innovationarch.com   | 479 95 429   | Richard Withs vei 168       |     | Customer |
| <input type="checkbox"/> |        | S Sondre L Nilisen     | 12039132782 | snilsen@gmail.com       | 913 83 075   | Molstadveien 173            |     | Customer |
| <input type="checkbox"/> |        | R June M Halland       | 23046324658 | villa@gmail.com         | 411 24 641   | Johan Nygaardsvolds vei 174 |     | Customer |

Item / Page: 10

[Prev](#) 35 / 116 [Next](#) [Refresh](#)

## ACCOUNT FORM

### BASIC INFORMATION

|  |   |   |
|--|---|---|
| NIN  | First name *                                    | Last name *   |
| <input type="text" value="Enter NIN"/>           | <input type="text" value="Enter First name"/>   | <input type="text" value="Enter Last name"/>                |
| DOB  | Gender  | Address   |
| <input type="text" value="Select DOB"/>          | <input type="text" value="Select Gender"/>      | <input type="text" value="Enter Address"/>                  |
| Post code  | City  | Country   |
| <input type="text" value="Enter Post code"/>     | <input type="text" value="Enter City"/>         | <input type="text" value="Select Country"/>                 |
| Email Address                                    | Phone Number                                    | Preferred Communication                                     |
| <input type="text" value="Enter Email Address"/> | <input type="text" value="Enter Phone Number"/> | <input type="text" value="Select Preferred Communication"/> |
| Status   | SSN   | SSN   |
| <input type="text" value="Select Status"/>       | <input type="text" value="Enter SSN"/>          | <input type="text" value="Enter SSN"/>                      |

### OTHER INFORMATION

|   |  |  |
|---|--|--|
| KAM   | Payment Type                                     | Payment Method                                     |
| <input type="text" value="Select KAM"/>                       | <input type="text" value="Select Payment Type"/> | <input type="text" value="Select Payment Method"/> |
| Preferred Collection Date                                     | Source   | Scoring  |
| <input type="text" value="Select Preferred Collection Date"/> | <input type="text" value="Select Source"/>       | <input type="text" value="Select Scoring"/>        |

The screenshot displays the 'Ashley Toll' account dashboard. It features a navigation menu at the top with options like SUMMARY, QUOTES, POLICIES, DOCUMENTS, ACTIVITY LOGS, CASES, EMAILS, NOTES, SMS, CONTACTS, and LINK. The main content area is divided into several sections:

- QUOTES:** Shows two quotes with values of 1126.84 GBP and 813.00 GBP.
- POLICIES:** Shows two policies with values of 813.00 GBP and 858.60 GBP.
- SALES ACTIVITIES:** Lists activities such as 'Abrahamsbergsvägen 64-72 168 30 Bromma' and 'Nyångsvägen 167 64 Bromma' with their respective statuses and creation dates.
- EMAILS:** Lists recent emails, including '[AP-261ed018-9fa9-4855-be1a-c103c6a2c121] Ashley Toll' and 'Hi again'.
- NOTES:** Lists notes such as 'Forsikringsvilkår fra en række' and 'Customer address changed'.
- CASES:** Lists cases like '[Claim request] Claim created' and '[Support request] Urgent'.

## HOW TO FIND

- Enter the URL for the system into the browser and log in
- Click on Menu Accounts and select submenu Accounts.

## DESCRIPTION

### ❖ HOW TO CREATE AN ACCOUNT

1. Navigate to Accounts menu > Accounts
2. Click + **CREATE** button on Account list
3. Select account type: Person or Company
4. Fill data into below fields (at least required field) to create an account

#### 4.1 Person account:

### Organization:

The users who are using the system can belong to a parent organization or child organization.

The user in the parent organization can create and view accounts for the parent organization or child organization. Default should be the parent organization. However, the user can select other child organizations.

The user in the child organization can create and view accounts of that child organization. If the user belongs to a child organization, the user cannot see the organization field in Create/Edit account form.

### Basic information

- **NIN:** this is optional and unique for all accounts.
- **First name:** this is a mandatory field
- **Last name:** this is a mandatory field
- **DOB**
- **Gender**
- **Address**

- **Post code**
- **City**
- **Country**
- **Email address**
- **Phone number**
- **Preferred Communication**
- **Status**

**Other information:** data in this section is optional

- **KAM**
- **Payment type**
- **Payment method**
- **Preferred Collection Date**
- **Source**
- **Scoring**

**Contact:** data in this section is optional

#### 4.2 *Company account:*

##### **Organization:**

The users who are using the system can belong to a parent organization or child organization.

The user in the parent organization can create and view accounts for the parent organization or child organization. Default should be the parent organization. However, the user can select other child organizations.

The user in the child organization can create and view accounts of that child organization. If the user belongs to a child organization, the user cannot see the organization field in Create/Edit account form.

##### *Basic information*

- **Org no.:** this is optional and unique for all accounts.
- **Company Name:** this is a mandatory field
- **Email address**
- **Company Phone**
- **Status**
- **Country**
- **Address:**
- **Visiting address**
- **Extra address**
- **Post code**
- **City**
- **Postal address**
- **Extra address**
- **Post code**

- **City**
- **Invoice address**
- **Extra address**
- **Post code**
- **City**

**Other information:** data in this section is optional

- **Credit rating**
- **Industry**
- **KAM**
- **Payment type**
- **Payment method**
- **Preferred Collection Date**
- **Source**
- **Scoring**

**Contact:** data in this section is optional

#### ❖ CREATE AN ACCOUNT WITH ORGANIZATION

The users who are using the system can belong to a parent organization or child organization.

The user in the parent organization can create and view accounts for the parent organization or child organization.


The user in the child organization can create and view accounts of that child organization.

#### ❖ HOW TO EDIT AN ACCOUNT

Edit an account on Account list

1. Navigate to **Accounts** menu > **Accounts** submenu
2. On the Account list, click the Edit button on the Action column. Edit Account popup will open.
3. Edit information on Accounts fields. All fields in Account are editable.
4. Click **Save**

Edit an account on summary page

1. Navigate to Accounts menu > Accounts submenu
2. Click on one of the Account name to open Account summary page
3. Click  button. Edit Account popup will open.
4. Edit information on Accounts fields. All fields in Account are editable.
5. Click **Save**

#### HOW TO IMPORT ACCOUNTS

1. Navigate to **Accounts** menu > **Accounts** submenu
2. Click on **Import Accounts** button on Account list
3. Drag and drop Account file into Import section.
4. Click **Next**
5. On the Select mapping tab: **map fields** from Import file to the current fields of the system.
6. Click Next to Preview page
7. Click Save

The mapping action here is to define the data in Imported file should fill into which fields of the system.

To map data, use data in "MAP TO FIELD" field.

There are 2 options on Map To Field field: Not Mapped and Mapped

Not Mapped: the data on this column will not be imported into the system.

Ex: The user imported a file which has 2 fields "Customer SSN" and "Customer". The system does not recognize these two fields so it shows "Not mapped" .

| ORIGIN KEY    | MAP TO FIELD |
|---------------|--------------|
| Customer SSN  | Not mapped   |
| Customer name | Not mapped   |

If you want to map Customer name and Account field (in the system), select "Account" on Map to field.



| ORIGIN KEY          | MAP TO FIELD        |
|---------------------|---------------------|
| Customer SSN        | Not mapped          |
| Customer name       | Account             |
| Account type        | Account             |
| Opportunity name    | Account type        |
| Account / Opp owner | Opportunity name    |
| Contacts            | Account / Opp owner |
| Currency            | Contacts            |
|                     | Currency            |

Mapped: the data on this column will be filled in a predefined field in the system.

## ❖ HOW TO EXPORT ACCOUNTS

Navigate to **Accounts** menu > **Accounts** submenu



1. On the Account list, select the Accounts which you want to export by ticking on the checkbox on the left side of the Account. Or ticking on the checkbox on the top to select all Accounts on that page.
2. Click  **Export Account** button on Account list.
3. Click  **Export History** button on Account list. This is where you can see all exported files.
4. Click on the name of the file to download the exported file.

#### ❖ HOW TO SEARCH ACCOUNTS

1. Navigate to Accounts menu > Accounts submenu
2. Click on the button Filter on Account list. Filter panel will open on the right hand side.
3. Input search data into the search criteria.
4. Click the Filter button at the bottom of the Filter panel.

#### ❖ HOW TO CREATE A FILTER

1. Click on the button **Filter** on Account list. Filter panel will open on the right hand side.
2. Input search data into the search criteria.
3. Click the **Save** button at the bottom of the Filter panel. Create Filter popup will open.
4. Enter a Name for the filter.
5. Select Filter type: there are two types of filter: Global Filter and Private Filter Global filter: all users in the system can see and use this filter. Private filter: only the creator of the filter can see and use this filter.
6. Click **Save**


You can select created Filters by clicking on the Filter field on the Lead list.

#### ❖ HOW TO CREATE A NOTE FOR AN ACCOUNT



1. Click on an Account name on the Account list.
2. Click on the Create note button to open the Create note popup.
3. Input data into below fields:
  - Title
  - Description
  - Related records: shows a list of records that are related to the note. The note created here should have the current account as the default related records.

You can add more related records. Ex: if you add an account to the related record list, the note can be found on that Account summary.


#### ❖ HOW TO MAKE A CALL

1. Click on an Account name on the Account list
2. Click on the Make a call button 
3. Select the phone number.

#### ❖ HOW TO CREATE A CASE

1. Click on an Account name on the Account list
2. Click on Create case button  to open Create case form.
3. Input data and click 

#### ❖ HOW TO SEND AN EMAIL

1. Click on an Account name on the Account list
2. Click on  button. Compose email popup will open.
3. Fill out data into the form and click **Send**.

#### ❖ HOW TO UPLOAD DOCUMENTS

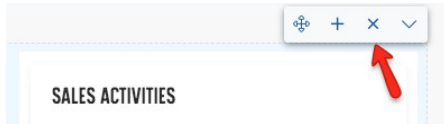
1. Click on an Account name on Account list
2. Open Document tab
3. Click **Upload Document** button
4. Enter **Name** of the document
5. Drag the document into the Uploading box
6. Click Save

#### ❖ HOW TO CONFIGURE ACCOUNT SUMMARY LAYOUT

The layout of Account summary can be changed for your demand by following below steps:

1. Navigate to the Account summary page.

2. Click on the Setting icon on the right side of the page
3. To delete a widget, hover the cursor over the widget that you want to delete and click the X button.




4. Click Save on Configuration popup.
5. To change the layout of the page, hover the cursor over the widget row and click X button to remove all the widgets.
6. Drag the layout from the Configuration popup and drop to the Summary page.
7. There are 5 layouts: 6:6; 4:4:4, 3:3:3:3, 9:3, 8:4  
 Ex: If you select a 6:6 layout for a row, 2 widgets can be added.  
 If you select 4:4:4 layouts, 3 widgets can be added.
8. Drag the widget from the Configuration popup and drop in the layout.
9. Click **Save** on Configuration popup.

#### ❖ HOW TO ADD RELATIONSHIPS BETWEEN THE ACCOUNTS

There is a relationship between two accounts. These can be parents - children, partner, siblings... on private line customers or Parent company - Child company on commercial

line customers. In order to add relationship between two accounts:

1. Open create or edit account form and scroll down to the bottom of the form
2. On RELATIONSHIP section, click on  button
3. Search and select an account and add the relationship

For commercial lines, the relationships can be Parent/Child. Only allow you to select a commercial line account when searching for an account to add relationship. If an account (1) is a child of another account (2), account (2) will be the parent company of account (1) automatically.

For private lines, the relationships can be parent/child/partner/sibling.

Only allow you to select a private line account when searching for an account to add relationship. If an account (1) is a parent of another account (2), account (2) will be the child of account (1) automatically.

Same for below cases:

Parent – Child

Child – Parent

Partner – Partner

Sibling - Sibling

## 2.4.2.1 Quotes

### HOW TO CREATE (IMPERSONATING) QUOTE

1. Open an Account
2. Navigate to Quotes tab

| ACTION | REFERENCE  | DESCRIPTION  | PRODUCT                     | POLICY TERM           | PREMIUM       | SALES PERSON   | ORGANIZATION   | STATUS      |
|--------|------------|--------------|-----------------------------|-----------------------|---------------|----------------|----------------|-------------|
|        | 506149     | Gillian Ltd. | Worker Compensation Act ... | 01/01/2021-31/12/2021 | 540.97 NOK    | Gillian Pham   | contem-testing | In Progress |
|        | 506128/001 | Gillian Ltd. | Group Life                  | 29/05/2021-28/05/2022 | 20 826.47 NOK | Gillian Pham   | contem-testing | Completed   |
|        | 506129     | Gillian Ltd. | Worker Compensation Act ... | 01/07/2021-30/06/2022 | 1 674.72 NOK  | Gillian Broker | Broker A       | In Progress |

3. Click Create button
4. [Optional] Select Sales Channel to filter products by channel
5. Select a Product

**SELECT A PRODUCT**

Sales Channel  
Origo Products Preview

**ORIGO PRODUCTS PREVIEW**

- Disability
- Drone Commercial Line
- Drone Personal Line
- Group Life
- Ivy Test
- Personal Accident (Full Time)
- Personal Accident (Leisure)
- Worker Compensation Act (WCA)

[Back To Quotes List](#)

6. Fill up Q&As form

## CREATE QUOTE

Questions Review Acceptance

QUOTE REF.: 506138

Created Date: a few seconds ago  
Last Edited date: a few seconds ago

### POLICY TERM

Start Date \*

29/05/2021

End Date \*

28/05/2022

### POLICYHOLDER

Organization Number \*

996003302

Company Name \*

Gillian Ltd.

Industry Code \*

03.120

Type Of Industry

Growing of rice

Address

200 Main St

Loss Ratio \*

1

### INSURANCE DETAILS

How Many Claims Have You Had In The Last 5 Years? \*

0

Free Text

Enter Free text

### ADDITIONAL COVERAGE

Would You Like To Include Additional Cover?

Yes

Invalidity 0-14.99

Yes

Additional Cover On Medical Disability

Yes

Sum Insured In G

3

Home - Work

Yes

### OCCUPATION LIST

Occupation 1 \*

Administrasjon kl 0

Number Of People

100

Man Labour Years \*

2

Would You Like To Add More Occupation?

No

Back To Quotes List

Back

Next

Policy term

Policyholder

Insurance details

Additional coverage

Occupation list

The Next button is only enabled when all the mandatory fields are filled up with valid data.

7. Click Next button to proceed to Quote Review page where it shows Premium and Cover breakdown.



**CREATING QUOTE** Send Document


**QUOTE REF.: 506138** *(Quote will be expired in 1 days)*

Created Date: 20 minutes ago  
Last Edited date: a few seconds ago

**INSURANCE INFORMATION**

Policy Term: 29/05/2021-28/05/2022  
Expiry Date: 29/05/2021


**PREMIUM**  **COVER BREAKDOWN** 

|  | ANNUAL PREMIUM      | POLICY PREMIUM      | COVER          | PREMIUM    |
|--|---------------------|---------------------|----------------|------------|
| Premium excl. Tax  | 757.34 NOK          | 757.34 NOK          | Extra Coverage | 148.85 NOK |
| Underwriting adjustment <input type="text" value="1"/> %  | 7.57 NOK            | 7.57 NOK            | Home Work      | 145.53 NOK |
| Sales discount <input type="text" value="5"/> %  | -38.25 NOK          | -38.25 NOK          | Invalidity     | 115.76 NOK |
| Product commission <input type="text" value="42.85"/> %  | 273.18 NOK          | 273.18 NOK          | Work Injury    | 752.52 NOK |
| Sales commission <input type="text" value="12"/> %   | 124.57 NOK          | 124.57 NOK          |                |            |
| Tax  | 0.00 NOK            | 0.00 NOK            |                |            |
| <b>Total premium</b>   | <b>1 162.66 NOK</b> | <b>1 162.66 NOK</b> |                |            |

**INSURANCE INFORMATION**


- Insurance Information
- Premium
- Cover Breakdown

**QUOTE DOCUMENTS**

 506138 X

Back To Quotes List Back Accept

8. [Optional] Users with appropriate permission can adjust the percentages at:
- Underwriting adjustment
  - Sales discount
  - Product commission
  - Sales commission

Then hit the  icon to get the premiums re-calculated.



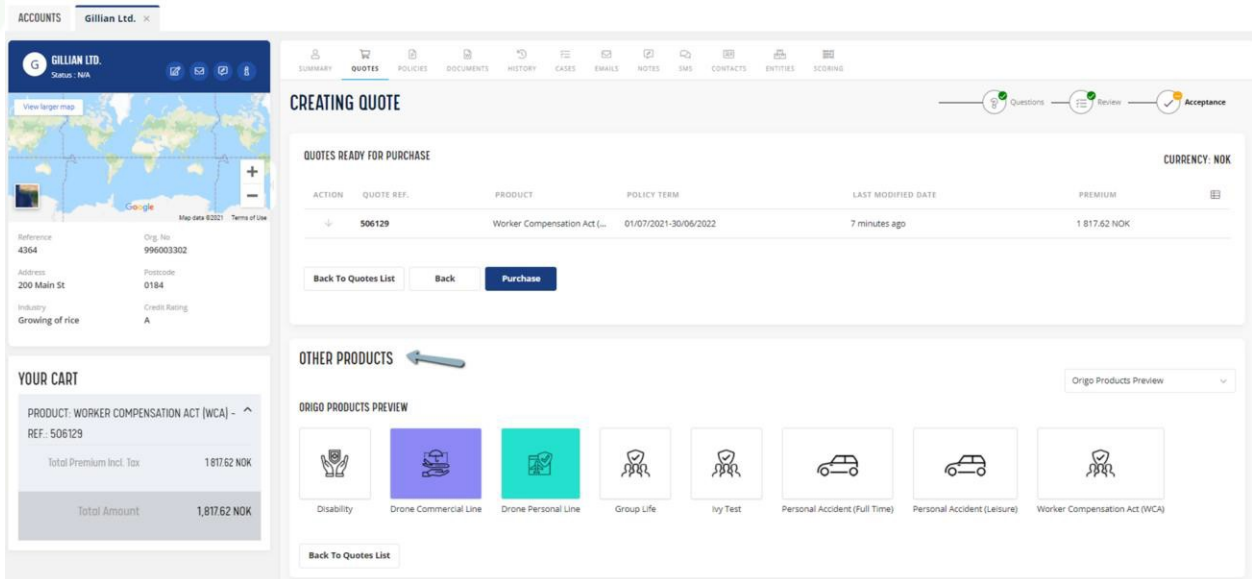
Quote - recalculate premiums

- 9. [Optional] Back button navigates user back to the Q&As form  
Back To Quotes List button navigates user back to Quote List page
- 10. Click Accept button, the quote is added to Quotes Ready For Purchase cart

| CREATING QUOTE            |            |                               |                       |                    |              |  | Questions     | Review | Acceptance |
|---------------------------|------------|-------------------------------|-----------------------|--------------------|--------------|--|---------------|--------|------------|
| QUOTES READY FOR PURCHASE |            |                               |                       |                    |              |  | CURRENCY: NOK |        |            |
| ACTION                    | QUOTE REF. | PRODUCT                       | POLICY TERM           | LAST MODIFIED DATE | PREMIUM      |  |               |        |            |
| ↓                         | 506138     | Worker Compensation Act (WCA) | 29/05/2021-28/05/2022 | 8 minutes ago      | 1 162.66 NOK |  |               |        |            |


[Back To Quotes List](#) [Back](#) [Purchase](#)

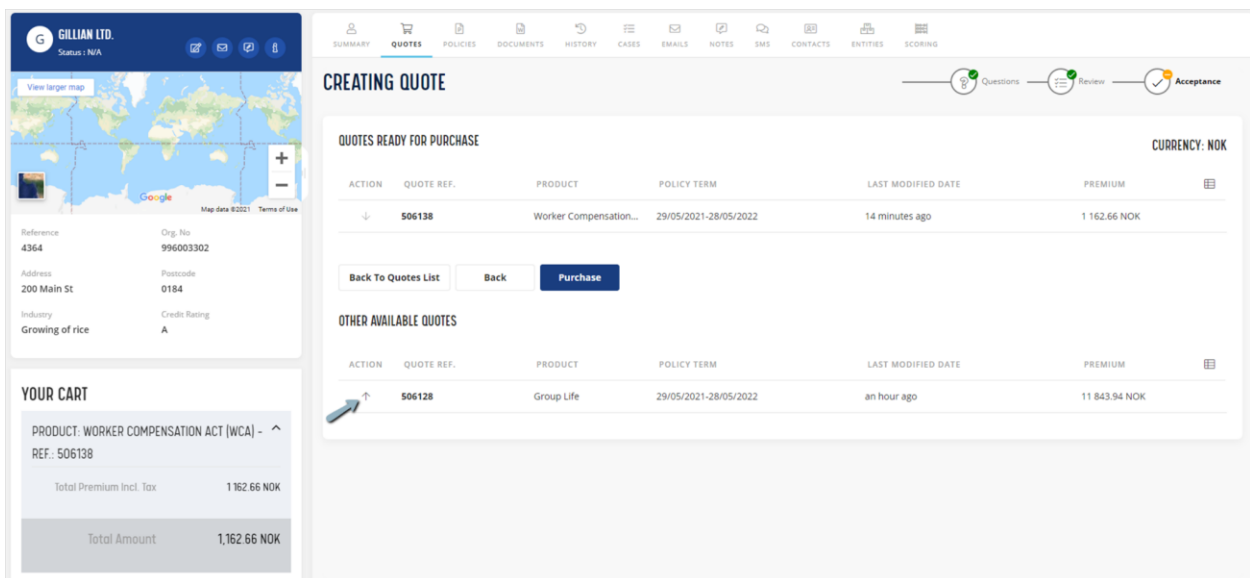
After accepting a quote, users can create another one without having to get back to Quote List page. Other Products section provides quicker access to Q&As form.



## HOW TO PURCHASE QUOTE

Users can purchase more than one quote at a time, as long as the quotes are all completed and in the same currency.

1. [Optional] Click the  icon to add a particular quote to Shopping cart



To remove quote from Shopping cart, click the  icon.

The information at Your cart section is updated



**GILLIAM LTD.**  
Status: N/A

View larger map

Reference: 4364  
Address: 200 Main St  
Industry: Growing of rice

Org. No: 996003302  
Postcode: 0184  
Credit Rating: A

**CREATING QUOTE**

Questions Review Acceptance

**QUOTES READY FOR PURCHASE** CURRENCY: NOK

| ACTION | QUOTE REF. | PRODUCT                       | POLICY TERM           | LAST MODIFIED DATE | PREMIUM       |
|--------|------------|-------------------------------|-----------------------|--------------------|---------------|
| ↓      | 506138     | Worker Compensation Act (...) | 29/05/2021-28/05/2022 | 17 minutes ago     | 1 182.66 NOK  |
| ↓      | 506128     | Group Life                    | 29/05/2021-28/05/2022 | an hour ago        | 11 843.94 NOK |

Back To Quotes List Back Purchase

**YOUR CART**

PRODUCT: WORKER COMPENSATION ACT [WCA] - ^  
REF: 506138  
Total Premium Incl. Tax: 1 182.66 NOK

PRODUCT: GROUP LIFE - REF: 506128 ^  
Total Premium Incl. Tax: 11 843.94 NOK

Total Amount: 13,006.60 NOK

2. Click Purchase button

Select Payment Option pops up with the account's Payment Type and Payment Frequency

**SELECT PAYMENT OPTION** X

Payment Type \* Invoice X

Payment Frequency \* Semi-Annually X

The selected payment frequency will apply for all available quotes in your current shopping cart.

OK Cancel

3. [Optional] Change payment option

4. Click OK.

The quotes are purchased and it shows hyperlinks to policy details page.

**POLICIES CREATED**

**SUCCESS! FOLLOWING POLICIES HAVE BEEN CREATED.**

| REFERENCE | PRODUCT                  | POLICY TERM           |
|-----------|--------------------------|-----------------------|
| 506138    | Worker Compensation A... | 29/05/2021-28/05/2022 |
| 506128    | Group Life               | 29/05/2021-28/05/2022 |

[Back To Quotes List](#)

## 2.4.2.2 Policies

### HOW TO FIND POLICY

1. Open an Account
2. Navigate to Policies tab

**ACCOUNTS** Gillian Ltd. x

**POLICIES**

| REFERENCE | DESCRIPTION  | PRODUCT                    | PERIOD                | POLICY PREMIUM | STATUS | SALES PERSON   | ORGANIZATION   | CREATED      |
|-----------|--------------|----------------------------|-----------------------|----------------|--------|----------------|----------------|--------------|
| 506128    | Gillian Ltd. | Group Life                 | 29/05/2021-28/05/2022 | 11 843.94 NOK  | Active | Gillian Pham   | contem-testing | 13 hours ago |
| 506138    | Gillian Ltd. | Worker Compensation Act... | 29/05/2021-28/05/2022 | 1 162.66 NOK   | Active | Gillian Broker | Broker A       | 13 hours ago |
| 505790    | Gillian Ltd. | Mosquito Protection        | 01/09/2020-31/05/2021 | 12.14 SGD      | Active | Gillian Pham   | contem-testing | 8 days ago   |

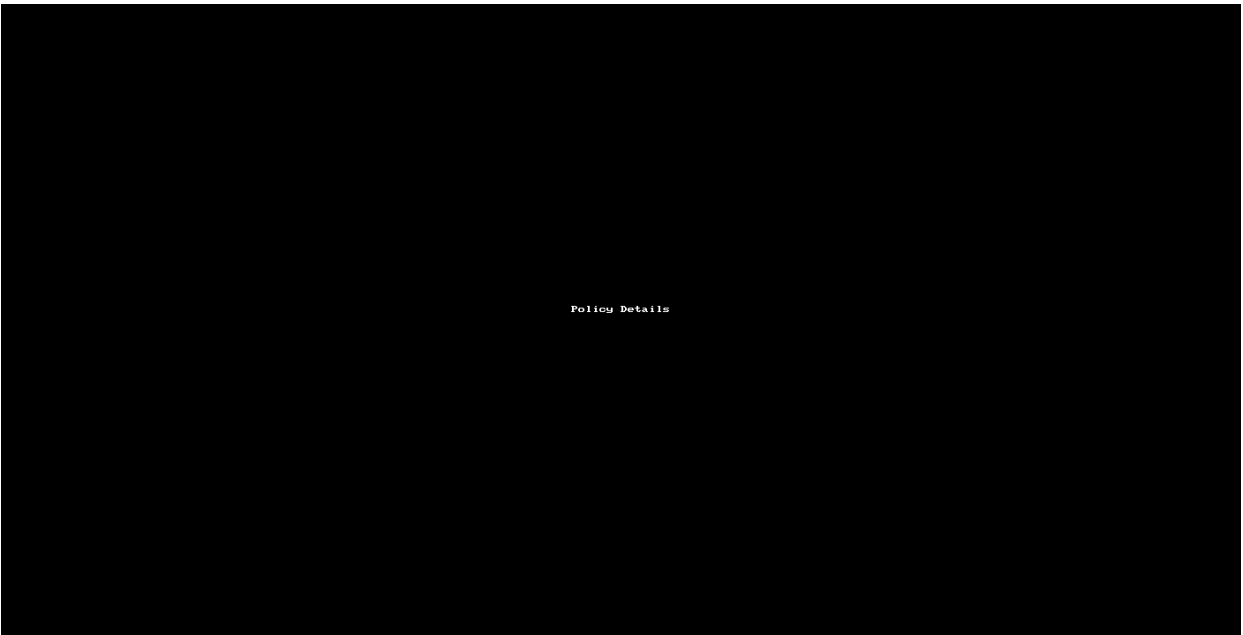
Item / Page: 10 Total 3 records

« Prev 1 / 1 Next »


It shows all columns by default, users can remove/re-add column(s).



3. Click Policy Reference hyperlink to open Policy Details page



#### HOW TO REVIEW RISK ANSWERS

1. Open Policy Details page
2. Scroll down to Policy Timeline section, locate and click on the  icon >> Risk Answers pops up

Start Date: 30/05/2021  
Organization Number: 996003302  
CustomerScoreTag: 0.855  
Company Name: Gillian Ltd.  
Industry Code: 03.120  
Type Of Industry: Growing of rice  
Address: 200 Main St  
Loss Ratio: 1  
Type Of Downscaling: 0  
Sum Insured In G Or NOK: NOK  
Sum Insured: 2000000  
Coordinated: No  
Spouse Addition: true  
Sum Insured In G: 3  
Spouse Insurance: true  
Sum Insured In G: 3  
Children Addition: true  
Sum Insured In G: 3  
DownscalingAgeTag:  
List Of Employees: 631411a6-1ee1-452f-8836-14c940740e30 | GroupLife-Sample-Upload\_v1\_2 (2).xlsx  
Does The Customer Have These Products With Another Insurer Today?:  
**false**  
Indicate Insurer Name:  
How Many Claims Have You Had In The Last 5 Years?:  
0  
Free Text:  
Rows Uploaded: 18  
Rows Processed: 18



## HOW TO DO MID-TERM-ADJUSTMENT (MTA)

1. Click the Adjust button >> Q&As form is open

**POLICY: 506128**

Adjust Renew Terminate


**POLICY INFO**

|                                 |                                 |                                 |
|---------------------------------|---------------------------------|---------------------------------|
| Product<br>Group Life           | Channel                         | Period<br>29/05/2021-28/05/2022 |
| Policy Premium<br>11 843.94 NOK | Annual Premium<br>11 843.94 NOK | Status<br>Active                |

**FILE UPLOAD RESULT**

|                     |                      |                            |
|---------------------|----------------------|----------------------------|
| Rows Uploaded<br>18 | Rows Processed<br>18 | Result Details<br>Download |
|---------------------|----------------------|----------------------------|

2. Select MTA Effective Date (*[tomorrow]* by default)  
Edit answers at Q&As
3. Click Next button >> navigated to Quote Review page with new premiums
4. [Optional] Users with appropriate permission can adjust the percentages at:
  - Underwriting adjustment
  - Sales discount
  - Product commission
  - Sales commission

Then hit the  icon to get the premiums re-calculated.

5. Click Accept button >> the quote is added to Quotes Ready For Purchase cart  
Quote Ref has a suffix of {/xxx} which is the adjustment version number.

**CREATING QUOTE**

Questions Review Acceptance

**QUOTES READY FOR PURCHASE** CURRENCY: NOK

| ACTION | QUOTE REF. | PRODUCT    | POLICY TERM           | LAST MODIFIED DATE | PREMIUM       |
|--------|------------|------------|-----------------------|--------------------|---------------|
| ↓      | 506128/001 | Group Life | 29/05/2021-28/05/2022 | 2 minutes ago      | 20 826.47 NOK |

Back To Quotes List Back Purchase

6. Click Purchase button
7. Select Payment Option and click OK >> Policy is MTA'd

## HOW TO RENEW POLICY

1. Open an active policy.
2. Locate and click on the Renew button.

ACCOUNTS Gillian Ltd. ×

SUMMARY QUOTES **POLICIES** DOCUMENTS HISTORY CASES EMAILS NOTES SMS CONTACTS ENTITIES SCORING

**POLICY: 506158** Adjust Renew Terminate

**POLICY INFO**

|                               |                |                       |
|-------------------------------|----------------|-----------------------|
| Product                       | Channel        | Period                |
| Worker Compensation Act (WCA) |                | 29/07/2020-28/07/2021 |
| Policy Premium                | Annual Premium | Status                |
| 587.14 NOK                    | 587.14 NOK     | Active                |

>> It opens the Renewal Q&As form, all Q&As are automatically pre-filled based on the original risk answers.

Note: Start-date is original-end-date + 1 day and cannot be changed.

**CREATE QUOTE**

QUOTE REF.: 506158/001

**POLICY TERM**

Start Date \*  
29/07/2021

End Date \*  
28/07/2022

3. [Optional] Make amendment to the Q&As if needed.
4. Click Next button >> navigated to Quote Review page where it shows Premium and Cover Breakdown, and user can edit UW Adjustment, Sales Discount, Product/Sales Commissions if needed.
5. Click Accept button
6. Click Purchase button and confirm Payment Options >> Renewal Policy is created and has the same Policy Reference number as the original.

ACCOUNTS Gillian Ltd. x

SUMMARY QUOTES POLICIES DOCUMENTS HISTORY CASES EMAILS NOTES SMS CONTACTS ENTITIES SCORING

| REFERENCE | DESCRIPTION  | PRODUCT              | PERIOD                | POLICY PREMIUM | STATUS         | SALES PERSON | ORGANIZATION    | CREATED           |
|-----------|--------------|----------------------|-----------------------|----------------|----------------|--------------|-----------------|-------------------|
| 506158    | Gillian Ltd. | Worker Compensati... | 29/07/2021-28/07/2022 | 587.14 NOK     | Created        | Gillian Pham | conteml-testing | a few seconds ago |
| 506158    | Gillian Ltd. | Worker Compensati... | 29/07/2020-28/07/2021 | 587.14 NOK     | Pending Ren... | Gillian Pham | conteml-testing | 2 minutes ago     |

## HOW TO TERMINATE POLICY

1. Open the policy that needs terminating.
2. Locate and click on the Terminate button.

ACCOUNTS Gillian Ltd. x

SUMMARY QUOTES POLICIES DOCUMENTS HISTORY CASES EMAILS NOTES SMS CONTACTS ENTITIES SCORING

**POLICY: 506159** Adjust Terminate

**POLICY INFO**

|                               |                |                       |
|-------------------------------|----------------|-----------------------|
| Product                       | Channel        | Period                |
| Worker Compensation Act (WCA) |                | 01/07/2021-30/06/2022 |
| Policy Premium                | Annual Premium | Status                |
| 1 750.61 NOK                  | 1 750.61 NOK   | Created               |

3. Select Effective From date and Termination Reason

**TERMINATE POLICY 506159** x

Current Period: 01/07/2021-30/06/2022

Current Premium: 1 750.61 NOK

Effective From: 01/07/2021

Reason: Please select...

New Premium:

4. Click Recalculate button

## TERMINATE POLICY 506159

Current Period: 01/07/2021-30/06/2022

Current Premium: 1 750.61 NOK

Effective From: 01/07/2021

Reason: No longer needed

New Premium: -

Recalculate

Terminate

Cancel

=

## TERMINATE POLICY 506159

Current Period: 01/07/2021-30/06/2022

Current Premium: 1 750.61 NOK

Effective From: 01/07/2021

Reason: No longer needed

New Premium: 0.00 NOK

Recalculate

Terminate

Cancel

5. Click Terminate button
6. Check Policy Details page for Policy Status
  - o For future Termination Effective date, it shows "Pending Termination"

ACCOUNTS Gillian Ltd. x

SUMMARY QUOTES POLICIES DOCUMENTS HISTORY CASES EMAILS NOTES SMS CONTACTS ENTITIES SCORING

**POLICY: 506144** ▶ Activate ⚙ Adjust ♻ Renew ✕ Terminate

**POLICY INFO**

|  |                              |                                 |
|--|------------------------------|---------------------------------|
| Product<br>Worker Compensation Act (WCA) | Channel                      | Period<br>01/12/2020-29/05/2021 |
| Policy Premium<br>345.33 NOK             | Annual Premium<br>700.24 NOK | Status<br>Pending Termination   |

- o For past Termination Effective date, it shows "Terminated"



ACCOUNTS Gillian Ltd. x

SUMMARY QUOTES POLICIES DOCUMENTS HISTORY CASES EMAILS NOTES SMS CONTACTS ENTITIES SCORING

**POLICY: 505790** × Terminate

**POLICY INFO**

|                                |                             |                                       |
|--------------------------------|-----------------------------|---------------------------------------|
| Product<br>Mosquito Protection | Channel                     | Period<br>01/09/2020-30/04/2021       |
| Policy Premium<br>10.76 SGD    | Annual Premium<br>16.24 SGD | Status<br>Terminated (Unpaid Premium) |

### 2.4.2.3 Quote and Policy Documents

#### HOW TO GET QUOTE DOCUMENT

Quote documents are generated manually.

1. Open the quote.
2. Locate Send Document button group.

SUMMARY QUOTES POLICIES DOCUMENTS HISTORY CASES EMAILS NOTES SMS CONTACTS ENTITIES SCORING

**CREATING QUOTE** Send Document Questions

**QUOTE REF.: 506149** *(Quote will be expired in 1 days)*

Created Date: 7 hours ago  
Last Edited date: a few seconds ago

**INSURANCE INFORMATION**

Policy Term: 01/01/2021-31/12/2021  
Expiry Date: 30/05/2021

3. Click the arrow down button.
4. Click Generate Document button.

**CREATING QUOTE** Send Document

**QUOTE REF.: 506149** *(Quote will be expired in 1 days)*

Generate Document

5. Quote Documents can be found at the right hand-side of the screen.

6. Click on Quote Ref button to download document.

## HOW TO GET POLICY DOCUMENT

Policy documents are automatically generated after policy purchase.

1. Open the policy.
2. Locate the Documents section on the right-hand side of the screen.
3. Click on the Policy Ref hyperlink to download document.

|                               | ANNUAL PREMIUM | POLICY PREMIUM |
|-------------------------------|----------------|----------------|
| Premium exl. Tax              | 16 145.52 NOK  | 16 145.52 NOK  |
| Underwriting adjustment 0%    | 0.00 NOK       | 0.00 NOK       |
| Product commission 37.931034% | 6 124.14 NOK   | 6 124.14 NOK   |
| Sales commission 0%           | 0.00 NOK       | 0.00 NOK       |

## 2.3 Leads

### MAIN FUNCTION

A lead is a person that is created in the system.

The lead who is interested in the products can be converted to an Account and then can start a sales process.

While converting the lead to an account, some information of the lead will be transferred to the account.

### SCREENSHOT

The screenshot shows a web interface for managing leads. At the top, there's a tab labeled 'LEADS' and a user profile 'Ashley Thomas'. Below this is a 'LEAD LIST' section with buttons for '+ Create', 'Import Lead', and 'Add To Target Group'. A 'Select filter' dropdown is on the right. The main part is a table with the following data:

| ACTION                   | NAME             | COMPANY            | MOBILE       | EMAIL                      |
|--------------------------|------------------|--------------------|--------------|----------------------------|
| <input type="checkbox"/> | Jon K Nysted     | N/A                | N/A          | N/A                        |
| <input type="checkbox"/> | Ashley Huynh     | ABC Bakery         | N/A          | N/A                        |
| <input type="checkbox"/> | Eivind G Madsen  | ContemiVN          | +84084452126 | ingvild@gmail.com          |
| <input type="checkbox"/> | Henry Johansen   | Pay                | 48894118     | sunniva@gmail.com          |
| <input type="checkbox"/> | Ola Sandanger    | N/A                | 98527081     | ola@gmail.com              |
| <input type="checkbox"/> | Trym S Bendiksen | N/A                | 49667914     | bendiksen@gmail.com        |
| <input type="checkbox"/> | G Madsen A Dahl  | ContemiNO          | +84084452126 | ingvild@gmail.com          |
| <input type="checkbox"/> | Michelle Huynh   | Contemi VN         | 09723333333  | michelle.huynh@contemi.com |
| <input type="checkbox"/> | Sunniva J Myhren | Zephyr Investments | 48894118     | sunniva@gmail.com          |
| <input type="checkbox"/> | Jasmine Nguyen   | ABC                | 0904530316   | jolie.nguyen@conteml.com   |

At the bottom left, there's a pagination control 'Item / Page: 10'. At the bottom right, there are navigation buttons: '< Prev', '1 / 2', and 'Next >'.

## LEAD



Basic Info More Info

First Name

Enter first name

Last Name \*

Enter last name

Company Name

Enter company name

Job Title

Enter Job title

Email

Enter email

Mobile

Enter mobile number

Address

Enter address

Postcode

Enter postcode

City

Save

Cancel

## HOW TO FIND

- Enter the url for the system into the browser and log in
- Click on Menu Accounts and select submenu Leads.

## DESCRIPTION

On the Lead module, the user can create a new lead, import leads, convert lead to account, search lead.

## ❖ HOW TO CREATE A LEAD

1. Open Lead list
2. Click on Create button  to open Create lead form.
3. Enter information on below fields and click

Save

First Name

Last Name

Company Name

Job Title

Email

Mobile

Address

Postcode

City

Country

KAM

Source

Lead created will be shown on top of the Lead list.

#### ❖ HOW TO IMPORT LEADS

1. Click on **Import Leads** button on the Lead list
2. Drag and drop Lead file into Import section.
3. Click **Next**
4. On the Select mapping tab: map fields from Import file to the current fields of the system.
5. Click **Next** to Preview page
6. Click **Save**

The mapping action here is to define the data in Imported file should fill into which fields of the system.

To map data, use data in "MAP TO FIELD" field.

There are 2 options on Map To Field: Not Mapped and Mapped

Not Mapped: the data on this column will not be imported into the system.

Ex: The user imported a file which has 2 fields "Customer SSN" and "Customer". The system does not recognize these two fields and it therefore shows "Not mapped".


| ORIGIN KEY    | MAP TO FIELD |
|---------------|--------------|
| Customer SSN  | Not mapped   |
| Customer name | Not mapped   |

If you want to map Customer name and Account field (in the system), select "Account" on Map to field.

| ORIGIN KEY          | MAP TO FIELD        |
|---------------------|---------------------|
| Customer SSN        | Not mapped          |
| Customer name       | Account             |
| Account type        | Account             |
| Opportunity name    | Account type        |
| Account / Opp owner | Opportunity name    |
| Contacts            | Account / Opp owner |
| Currency            | Contacts            |
|                     | Currency            |

Mapped: the data on this column will be filled in a predefined field in the system.

#### ❖ HOW TO CONVERT LEAD TO AN ACCOUNT

1. Hover over button  on Lead list
2. Select to convert lead to a **Person** or **Company** account
3. Create an Account form will open. Depending on what is selected on step 2, the system opens the Account creating form for Person or Company.
4. Click **Save**

If you convert the lead to a Person account, data of the lead will be filled out into these fields of the Account:

- First name: is the first name of the Lead
- Last name: is the last name of the Lead
- Address: is the address of the Lead
- Post Code: is the postcode of the Lead
- City: is the city of the Lead
- Country: is the country of the Lead
- Email address: is the email of of the Lead
- Phone number: is the mobile of the Lead

If you convert the lead to a Company account, data of the lead will be filled out into these fields of the Account:

Data of the lead will be filled out into these fields of the Account:

- Company name: is Company name of the Lead
- Email address: is the email of of the Lead
- Phone number: is the mobile of the Lead
- Country: is the country of the Lead
- Visiting Address: is the address of the Lead
- Post Code (Visiting Address): is the postcode of the Lead
- City(Visiting Address): is the city of the Lead

#### ❖ HOW TO SEARCH LEAD

1. Click on the button **Filter** on Lead list. Filter panel will open on the right hand side.
2. Input search data into the search criteria.
3. Click the **Filter** button at the bottom of the Filter panel.

#### ❖ HOW TO CREATE A FILTER

1. Click on the button **Filter** on Lead list. Filter panel will open on the right hand side.
2. Input search data into the search criteria.
3. Click the **Save** button at the bottom of the Filter panel. Create Filter popup will open.
4. Enter a Name for the filter.

Select Filter type: there are two types of filter: Global Filter and

Private Filter Global filter: all users in the system can see and use this filter.

Private filter: only the creator of the filter can see and use this filter.

5. Click **Save**

You can select created Filters by clicking on the Filter field on the Lead list.

## 2.5 *Contacts*

### MAIN FUNCTION

A contact is a person that is linked with an account (Person or Company)

For a Person account, the contacts can be Parents, Spouse, Children, Siblings,..

For a Company account, the contacts can be Sales executive, CEO, CFO, Accountants,...  
SCREENSHOT

**CONTACTS**

**CONTACT LIST** [+ Add Contact](#) [Add To Target Group](#) Select filter Filter

| <input type="checkbox"/> | NAME                 | RELATED ACCOUNT                        | PHONES     | EMAILS                           |  |
|--------------------------|----------------------|--|------------|----------------------------------|--|
| <input type="checkbox"/> | Henry Nguyen         | Stein M Tobiasen                       | 032546546  | henry@gmail.com                  |  |
| <input type="checkbox"/> | Aleksander T Veve    | Ingrid O Mauseth                       | 91810198   | aleksander.tvevie62@gmail.com    |  |
| <input type="checkbox"/> | Matheus T Westby     | Aletta Pharmaceuticals Production Ltd. | 94553541   | matheus@alettapharma.com         |  |
| <input type="checkbox"/> | Alexandre Tachinardi | Simon E Henden                         | N/A        | Alexandre.Tachinardi@hotmail.com |  |
| <input type="checkbox"/> | Tobias N Holth       | The Chic Connection                    | 997 10 422 | tobias.holth@chicconnection.com  |  |
| <input type="checkbox"/> | Wilhem Smith         | Gillian Smith                          | 95175382   | wilhem.smith@zodiactd.com        |  |
| <input type="checkbox"/> | Leon NG              | Roroholic Inc.                         | N/A        | N/A                              |  |
| <input type="checkbox"/> | Christina Thompson   | Aurora Ware                            | N/A        | N/A                              |  |
| <input type="checkbox"/> | Andre Ekkel          | Harry Nguyen                           | 78654321   | aekkel0@gmail.com                |  |

Item / Page: 10 < Prev 1 / 13 Next > [Refresh](#)

**CONTACTS** ×

**ACCOUNT**

Search account \*

**CONTACT**

First name \*

Last name \*

Date of birth

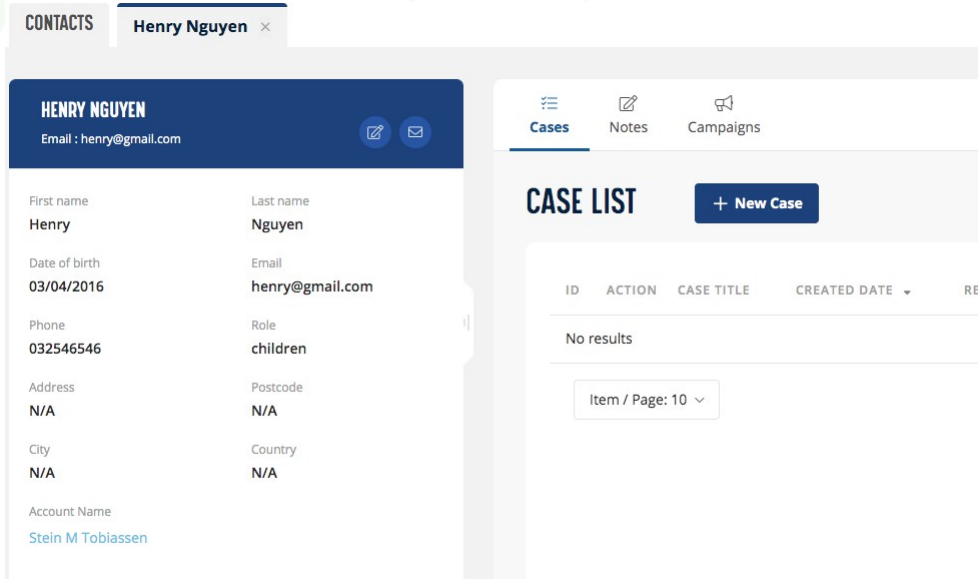
Email

Phone

Address

[Save](#) [Cancel](#)





### HOW TO FIND

- Enter the url for the system into the browser and log in
- Click on Menu Accounts and select submenu Contacts.

### DESCRIPTION

#### ❖ HOW TO CREATE A CONTACT

There are 3 ways to create a contact:

- Creating the contact on Contact menu
  - Creating contact when creating an Account
  - Creating contact on Contact tab under an Account
- + *Creating the contact on Contact menu***
1. Open Contact menu
  2. Click **+ Create** button. Create contact popup will open.
  3. Enter data into required fields.
  4. Click Save.
- Accounts: A contact must belong to an Account. You can search and select the Account for the contact on Search Account field
  - First name
  - Last name
  - Date of Birth
  - Email
  - Phone
  - Address
  - Postcode

+ *Creating the contact when creating an Account*

1. Navigate to Accounts -> Accounts. Account list will open.
2. Click + **Create** to open Create Account form
3. Enter all required fields in Basic information section
4. Scroll down to the bottom of the form to see Contact list section
5. Click + button next to Contact list to open Create Contact form

**CONTACT LIST** +

6. Enter data into Create Contact form and click Save

The contact created here will be linked with the current Account.

+ *Creating contact on Contact tab under an Account*

1. Navigate to Accounts -> Accounts. Account list will open.
2. Open summary page of the Account which you want to create the Contact for.
3. Click on the Contacts tab.
4. Click on **Create contact** button to open Create contact form.
5. Enter data into Create contact form.
6. **Click Save**

❖ HOW TO VIEW CONTACT

1. Navigate to Accounts -> Contacts
2. Click on Contact name to open Contact details screen

❖ HOW TO SEARCH CONTACTS

1. Click on the button **Filter** on Contact list. Filter panel will open on the right hand side.
2. Input search data into the search criteria.
3. Click the **Filter** button at the bottom of the Filter panel.

## 2.6 Sales & Distribution

### 2.6.1 Pipeline Managements

#### MAIN FUNCTION

A sales pipeline is a set of stages that a lead/prospect moves through, as they progress from a new lead to a customer.

## SCREENSHOT

**PIPELINE** + New Pipeline

- Sales
- Pipeline Management

| <input type="checkbox"/> | ACTION | ACTIVITY NAME     |
|--------------------------|--------|-------------------|
| <input type="checkbox"/> |        | Sale              |
| <input type="checkbox"/> |        | Renewal           |
| <input type="checkbox"/> |        | Black Friday 2020 |

**PIPELINE** [Close]

**INFORMATION**

Name \*  
New year sales  Is Default

Pipeline reference  
[Dropdown]

**DEAL STAGE** +

|  | NAME             | PROBABILITY |
|--|------------------|-------------|
|  | New              | 0           |
|  | Assigned         | 10          |
|  | Quote created    | 60          |
|  | Policy purchased | 90          |
|  | Won              | 100         |
|  | Lost             | 0           |



## HOW TO FIND

- Enter the url for the system into the browser and log in
- Click on Menu Sales and Pipeline management and select submenu Pipeline management.

## DESCRIPTIONS

The user can create a new Pipeline, edit/delete existing pipelines and view pipelines when accessing the Pipeline management page.

### ❖ HOW TO CREATE A NEW PIPELINE

1. Open Pipeline management page
2. Click 
3. Enter information on below fields and click 

**Name:** This is a mandatory field and a free text field.

There is a “Is default” checkbox on the Name field. When the “Is default” field is ticked, this pipeline becomes the default pipeline. So when the user creates a new sale, this default pipeline is chosen automatically.

Only one Pipeline can be marked as Is default at a time.

#### Pipeline reference:

A drop down list that the user can select a pipeline for reference. When a pipeline is selected, the stages of the selected pipeline will be displayed in the Deal stage of the current pipeline.

This is an optional field.


#### Deal stage:


There are two default stages: Won (100%) and Lost (0%)

These two stages are always at the bottom of the pipeline. The user can edit the name “Won” and “Lost” but cannot delete them.



The user can add more stages by clicking on this button. 

When a new stage is added, name and probability fields of that stage need to be filled out.

The user can remove the stages which are added manually by clicking button  . If a stage is in use, it cannot be removed.

The user can drag and drop the stages to change the order of them by hovering  over button and drag it.


### ❖ HOW TO EDIT A PIPELINE

1. Click on Edit button  on a Pipeline on Pipeline list.
2. Pipeline detail popup will open.
3. Edit information on Pipeline
4. Click 

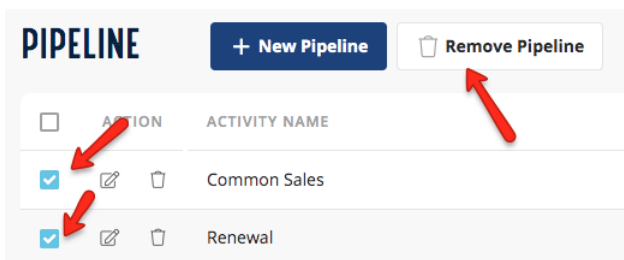
The user can edit

- Name of Pipeline
- Is Default. If the "Is default" checkbox is checked, the user can un-check it. Or mark a pipeline as Is default if there is no default pipeline.
- Deal stages: the user can add a new stage, edit name and probability of existing stages, remove existing states if the stages are not in use.

#### ❖ HOW TO DELETE A PIPELINE

1. Click on Delete button  on a Pipeline on Pipeline list.
  2. The system will ask if the user wants to delete the pipeline. Clicking Yes if you want to delete the pipeline. Click No if you want to cancel.
- Note: You can delete only the pipelines which have no sale attached to it.

You can delete multiple pipelines at the same time by ticking on the checkbox on the right side of each pipeline then clicking on the Remove Pipeline button.



### 2.6.2 Sales

#### MAIN FUNCTION

A sale or deal is a type of activity. It represents something you want to sell and has a value attached to it. The prospect is moved from one stage to another through the sales process.

The salesperson can easily see where the sale is at and create notes or cases to follow up the sale.

# SCREENSHOT

SALES

SALES LIST

+ Create New Sale | Import Sales

All sales | Select filter | Filter

| ACTION                   | SALES                      | ACCOUNT                 | ACTIVITIES        | SALES REP. | KAM | AMOUNT     | CURRENCY | CLOSED DATE | STAGE                |
|--------------------------|----------------------------|-------------------------|-------------------|------------|-----|------------|----------|-------------|----------------------|
| <input type="checkbox"/> | 2000 Land Rover Rang...    | Deco Refreshments, Inc. | December ren...   | N/A        | N/A | 500.000    | NOK      | 15/11/2020  | 50% - Mid            |
| <input type="checkbox"/> | 1998 Nissan Almera         | Edmond C Gerald         | December ren...   | N/A        | N/A | 100.000    | NOK      | 25/11/2020  | 70% - Low            |
| <input type="checkbox"/> | Dell Inspiron 1318 - #3... | Laura Smith             | Black Friday 2... | N/A        | N/A | 5.000      | USD      | N/A         | 80% - Confirm Quote  |
| <input type="checkbox"/> | Iphone 12 - IMEI 30 99...  | Laura Smith             | Black Friday 2... | N/A        | N/A | 3.000      | USD      | N/A         | 0% - Lost            |
| <input type="checkbox"/> | 1996 GAZ 3110              | Lawrence E Terrell      | Black Friday 2... | N/A        | N/A | 0          | NOK      | N/A         | 100% - Won           |
| <input type="checkbox"/> | 1996 Mercedes-Benz C       | Solution Answers        | December ren...   | N/A        | N/A | 150.000    | NOK      | N/A         | 100% - Won           |
| <input type="checkbox"/> | SHIPPING - BLACK - 560     | Blackburn Ltd.          | Black Friday 2... | N/A        | N/A | 0          | NOK      | N/A         | 50% - Call           |
| <input type="checkbox"/> | Koff - 133 Alabama Ro...   | A Piece of Sugar Ltd.   | Black Friday 2... | N/A        | N/A | 10.000.000 | NOK      | N/A         | 90% - Confirm Policy |
| <input type="checkbox"/> | Samsung Note 10 - #6...    | Laura Smith             | Black Friday 2... | N/A        | N/A | 1.500      | USD      | N/A         | 80% - Confirm Quote  |

Item / Page: 10 | Prev 6 / 7 Next

SALES

SALES LIST

+ Create New Sale | Import Sales

QUOTE CREATED  
EUR: 860.000; NOK: 0; KRW: 4.333.545; 3

**AUTO - ERLE - 099**

Erlie I Account

Amount: NOK 0  
Closed Date: N/A

50%

POLICY PURCHASED  
CAD: 900; SGD: 150.000; 2

**WEALTH - GARBRIELLE STI - 778**

Gabrielsen STI Account

Amount: CAD 900  
Closed Date: N/A

90%

WON  
NOK: 0; 2

**Bugle Boy**

Bugle Boy Account

Amount: NOK 0  
Closed Date: N/A

100%

LOST  
NOK: 2.000; 1

**1999 Acura EL**

Lotta T Skeie Account

Amount: NOK 2.000  
Closed Date: N/A

0%

**LIFE - SOFIA - 456**

Sofia A Vaughan Account

Amount: NOK 0  
Closed Date: N/A

50%

**CAR - EWAN - NA543**

Ewan E Lynch Account

Amount: SGD 150.000  
Closed Date: 16/11/2020

90%

**2005 MG XPower**

Tomoko S Delc... Account

Amount: NOK 0  
Closed Date: N/A

100%

## CREATE SALE



Choose from existing account

Search account



### ACCOUNT INFO

First name \*

Enter first name

Last name \*

Enter last name

SSN / ORG. Id

Enter SSN / ORG. Id

Email

Enter email

KAM \*

Select KAM



### OPPORTUNITY

Pipeline \*

Common Sales



Stage \*

Open - New - 0%



Opportunity name \*

Enter opportunity

Sales rep.

Select sale rep.



Currency

Norwegian Krone (NOK)



Create

Cancel

## IMPORT



Upload file

Select mapping

Preview



Sample file



Drag your files here or

Upload file

### IMPORT INFO

KAM

Select KAM



Pipeline \*

Please select



Next

Cancel


The screenshot displays a CRM interface for an opportunity named 'Cadillac - Escalade'. The top navigation bar includes 'Summary', 'Contacts', 'Cases', and 'Notes'. A progress bar shows the stages: New, Assigned, Contact, Quotation, Policy purchased, Won, and Lost. The 'New' stage is currently active. Below the progress bar, there are sections for 'CASES' and 'NOTES'. The 'CASES' section lists two tasks: 'Task for Demo' (due 16/07/2020) and 'New Task 03/07' (due 03/07/2020). The 'NOTES' section lists two notes: 'New note for 26/10' (created 26/10/2020) and 'Note1stDeal' (created 21/08/2020). On the right, a 'CONTACTS' section shows 'Christina Thompson' with phone number 'N/A'. On the left, a sidebar provides details for the opportunity, including account name 'Aurora Ware', pipeline 'October Special Offers', sales rep 'Coco Crouch', closed date '23/10/2020', probability '20%', KAM 'Michelle Huynh', and amount '30.000'.

## HOW TO FIND



- Enter the url for the system into the browser and log in
- Click on Menu Sales and Pipeline management and select submenu Sales.

## DESCRIPTIONS

### ❖ HOW TO VIEW SALES LIST

1. Go to menu Sales & Distribution and click on submenu Sales
2. Sales list will appear.
3. You can view the sales in Card view by clicking this button 
4. The user can take some actions on Sales list such as:
  - Create a sale
  - Import sales
  - Edit a sale
  - Create note for a sale
  - Delete a sale
  - Search sale

### ❖ HOW TO CREATE A SALE

1. Click on  on Sales list
2. Select that the sale is created for a Person or Company (Private line account or Commercial account)
3. Create sale form will open
4. Enter information into below fields and click 



Choose From Existing Account: This is a dropdown list and displays the Accounts in the system. Depending on the account type you select when creating a sale, the list displays just Person or Company Accounts.

A sale must belong to an Account.

If you select an account from the existing accounts, the account info below will disappear.

If you do not select an account from the existing accounts, you need to enter the data into the Account info section below to create a new account for the sale.

#### *Account info:*

First Name: This is a

Mandatory field. Last Name:

This is a Mandatory field

SSN/Org no.: This is an optional field. SSN/Org no. should be unique for an

Account. Email: This is an optional field.

KAM: This is an optional field.

#### *Sale:*

Pipeline: This is a mandatory field. Default is the "Is Default" pipeline which is set up in Pipeline management.

Stage: This is a mandatory field. A dropdown list displays all Deal stages of the Pipeline.

Sale Name: This is a mandatory field.

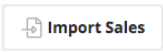
Sales Rep: This is an optional field. Sale rep is someone who works on the sale to get it done.

Currency: This is an optional field. A dropdown list which displays all currencies.

Amount: This is an optional field. Is the amount of

the sale. Closed Date: This is an optional field.

## ❖ HOW TO IMPORT SALES

1. Click on  on the Sales list.
2. Import sales popup will open.
3. Drag and drop Sales file into Import section. Download a sample file if you don't have it.
4. Select KAM (Optional) and Pipeline for the Sales and click Next

On the Select mapping tab: If you use the Sample file that is downloaded from the system, all fields are mapped and you just need to click Next.

If you use another file which has a different format to the Sample file, you need to map the field manually. The mapping action here is to define the data in Imported file should fill into which fields of the system.

There are 2 options on Map To Field field: Not Mapped, Mapped

Not Mapped: the data on this column will not be imported into the system.

If you want to import the data from a Not mapped field into the system, you need to map the field manually.

Ex: The user imported a file which has 2 fields "Customer SSN" and "Customer". The system does not recognize these two fields so it shows "Not mapped" .




| ORIGIN KEY    | MAP TO FIELD |
|---------------|--------------|
| Customer SSN  | Not mapped   |
| Customer name | Not mapped   |

If you want to map Customer name and Account field (in the system), select "Account" on Map to field.



| ORIGIN KEY          | MAP TO FIELD        |
|---------------------|---------------------|
| Customer SSN        | Not mapped          |
| Customer name       | Account             |
| Account type        | Account             |
| Opportunity name    | Account type        |
| Account / Opp owner | Opportunity name    |
| Contacts            | Account / Opp owner |
| Currency            | Contacts            |
|                     | Currency            |

Mapped: the data on this column will be filled in a predefined field in the system.

#### ❖ HOW TO EDIT A SALE

1. Click on Edit button  on Sales list or open the sale details page by clicking on the Sales name and click on Edit button .
2. Update sale detail page will open.
3. Edit information and click  Save

#### ❖ HOW TO DELETE A SALE

1. Click on Delete button  on the Sales list.
2. You should be asked if you wanted to delete the sale.
3. Click  to confirm that the sale will be deleted.

#### ❖ HOW TO VIEW A SALES SUMMARY


1. Click on a Sales name on the Sales list.
2. The sale summary will open.
3. On sales summary, you can:
  - Create notes for the sale
  - Make a call to the account or contact person of the account
  - Create tasks.

#### ❖ HOW TO CREATE A NOTE FOR A SALE


1. Click on a Sales name on the Sales list.
2. Click on the Create note button to open Create note popup.
3. Input data into below fields:
  - Title
  - Description
  - Related records: shows a list of records that are related to the note. The note created here should have the current sale as the default related records.

You can add more related records. Ex: if you add an account to the related record list, the note can be found on that Account summary.

#### ❖ HOW TO MAKE A CALL

1. Click on a Sales name on the Sales list
2. Click on the Make a call button 
3. Select a phone number. This can be the phone number of the account or the phone numbers of the contact people.

#### ❖ HOW TO CREATE A CASE

4. Click on a Sales name on the Sales list
5. Click on Create case button  to open Create case form.
6. Input data and click 

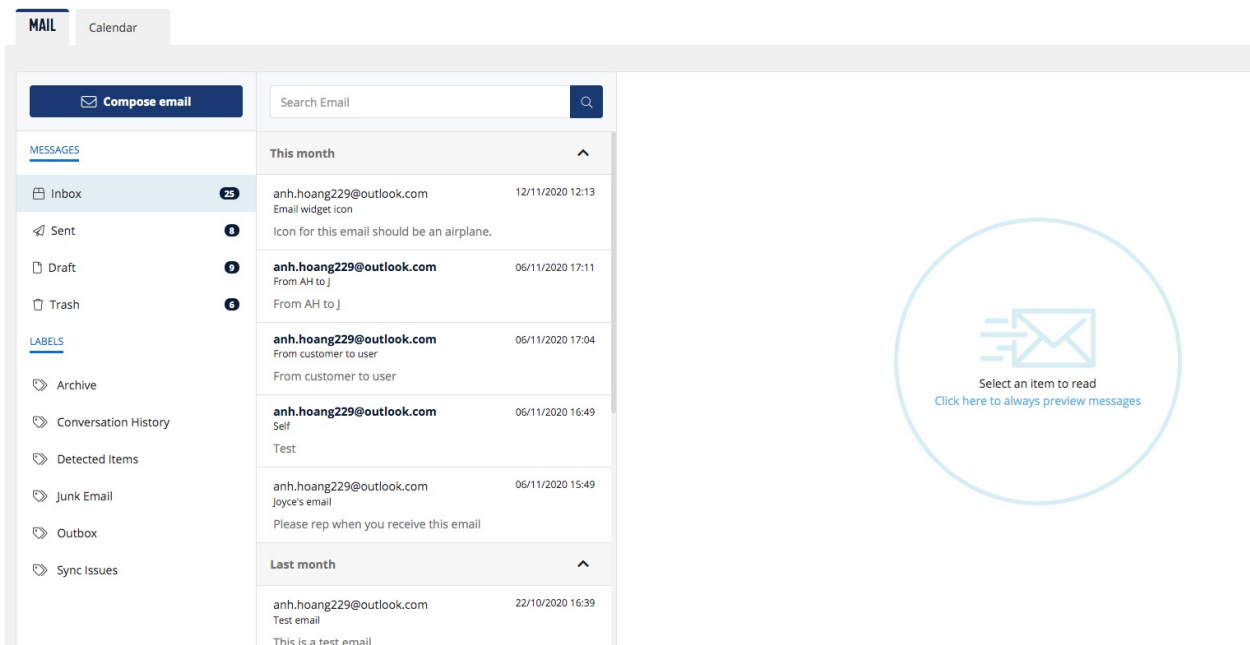
## 2.7 Communication

### 2.7.1 Mail

#### MAIN FUNCTION

This function allows you to send, receive emails, set up appointments by connecting your Outlook email with Seamless.

#### SCREENSHOTS



The screenshot displays the 'MAIL' interface. On the left, there is a navigation pane with 'Compose email' and a search bar. Below that, a list of folders (Inbox, Sent, Draft, Trash) and labels (Archive, Conversation History, Detected Items, Junk Email, Outbox, Sync Issues) is visible. The main pane shows a list of messages from 'anh.hoang229@outlook.com' with details like 'Email widget icon', 'Icon for this email should be an airplane.', 'From AH to J', and 'From customer to user'. A large circular callout on the right contains an envelope icon and the text 'Select an item to read' and 'Click here to always preview messages'.

The screenshot shows the Outlook 'MAIL' interface. On the left, there's a navigation pane with 'Compose email' at the top, followed by 'MESSAGES' and 'LABELS'. The 'MESSAGES' section shows a list of emails from 'conteml\_test@outlook.com' with dates ranging from 07/05/2021 to 11/05/2021. The main area displays a 'New message' composition window with fields for 'From', 'To', 'Subject', and 'Body'. The 'From' field is filled with 'conteml\_test@outlook.com'. The 'To' field is empty. The 'Subject' field is empty. The 'Body' field is empty. The interface also shows a 'SELECT AN ITEM TO READ' header and a 'Related Account' dropdown menu.

The screenshot shows the Outlook 'Calendar' interface for November 2020. The calendar is displayed in a monthly view. The days of the week are listed at the top: SUNDAY, MONDAY, TUESDAY, WEDNESDAY, THURSDAY, FRIDAY, and SATURDAY. The dates are arranged in a grid. An appointment titled 'Appointment with Lisa Pete...' is scheduled for Tuesday, November 24th. The interface includes a 'Make appointment' button, a 'Calendar' dropdown, a 'View by: month' dropdown, and navigation buttons for 'Today', '<', '>', and a refresh icon.

## DESCRIPTION

### ❖ HOW TO CONNECT TO OUTLOOK

1. Login to the system
2. Click Setting icon at the top right corner.
3. Click Mail Setting. A Mail Setting popup will appear as below



MAIL SETTING

Outlook

Cancel

4. Click Connect button in Outlook field.
5. You should be navigated to <https://login.microsoftonline.com/> page
6. Input your email address to connect.

#### ❖ HOW TO SEND EMAIL

After connecting to Outlook, you can send emails by

1. Go to Communications > Mail
2. Click **Compose Email**
3. Input data into below fields and click **Send**

**Related Accounts:** this field is optional. The user can search and select multiple accounts. When an account is selected:

- The email address of that account will be available to select in To field
- The information of this account can be used to replace data in template
- The documents of this account can be attached to the email easily.

**From:** this field is required. Default display the email address you're connecting

**To:** email addresses of the people that you want to send the email to. This field displays all email addresses of related accounts. However, you can enter other email addresses manually.

**Cc:** email addresses of the people that you want to cc the email to. This field displays all email addresses of related accounts. However, you can enter other email addresses manually.

**Bcc:** email addresses of the people that you want to bcc the email to. This field displays all email addresses of related accounts. However, you can enter other email addresses manually.

**Template:** You can select an email template which is predefined in Template management module

**Subject:** This field is required. This field is prefilled automatically when a template is chosen.

**Body:** This field is required. This field is prefilled automatically when a template is chosen.

**Account's Document:** this field lists out all documents of related accounts.

#### **Attachment**

#### ❖ HOW TO MAKE APPOINTMENT

After connecting to Outlook, you can make an appointment by

1. Go to Communications > Mail

2. Open Appointment tab
3. Input data into below fields and click Save

Date: Date of the appointment.

If you tick on All day checkbox, Start time and End time fields will be hidden.

Start time

End time

Attendees: You can select the email addresses of other users in the system or enter the email address of the Account, Lead, Contact...

Body

### 2.7.2 Call Center

#### MAIN FUNCTION

This function allows you to have incoming and outgoing telephone calls from both new and existing accounts, leads, contacts.



Call center provides the agents with access to account information and history instantly, which allows them to help customers with up-to-date and relevant information during support.

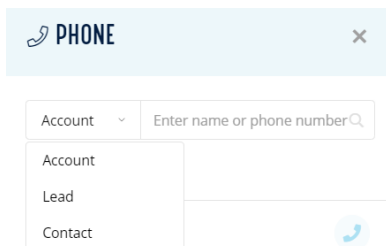
#### DESCRIPTION

##### ❖ HOW TO MAKE A CALL

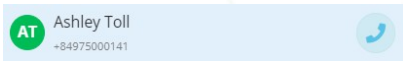
Note: You must be added into a Phone queue in order to make a call.

##### MAKING A CALL FROM GLOBAL MENU

1. Navigate to Communications > Call center. Phone queue list will appear.
2. Click Connect button  on the Queue which you want to connect to.
3. Click  on the Global menu at the right bottom of the screen. Phone popup will open.
4. You can make a call to an Account, Lead or Contact. Select the entity and input name of account, lead or contact into the search field to search for the right person to call.

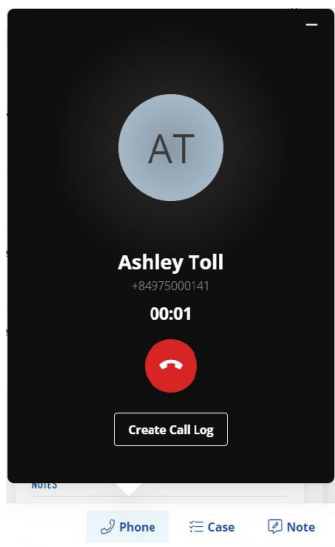


5. Click Call icon



#### ❖ MAKING A CALL FROM ACCOUNT SUMMARY SCREEN

1. Navigate to Accounts > Accounts
2. Search for the Account which you want to make a call and open the Account summary screen.
3. Click on the Phone icon. The phone number of the account will appear.
4. Click on the phone number. Phone call popup will open and start the call.



#### ❖ MAKING A CALL FROM SALES SUMMARY SCREEN

1. Navigate to Sales & Distribution > Sales
2. Search for a sale
3. Click on the Phone icon. The phone numbers will appear. It could be the phone number of the Account or Contacts.
4. Click on a phone number. Phone call popup will open and start the call.

## 2.8 Workflow & Case

### 2.8.1 Case Management Case List

#### SCREENSHOT



**C** DASHBOARD ACCOUNTS SALES & DISTRIBUTION COMMUNICATIONS **WORKFLOWS** ENTITIES All Entities

Cases

1 2

Case Management  
Workflow Setup

CASE LIST + My case Select filter

| Id  | Action | Case title                        | Case type         | Entity           | Created date     | Remaining time | Due date         | Priority | Status | Assignee | Queue       |
|-----|--------|-----------------------------------|-------------------|------------------|------------------|----------------|------------------|----------|--------|----------|-------------|
| 243 |        | [Welcome] Amy L Øyen              | Send welcome e... | Amy L Øyen       | 20/10/2020 17:10 | 02:20:41:57    | 23/10/2020 17:09 | Low      | To do  | Demo One | Task        |
| 232 |        | [Support request] Elias M Kvalvik | Support request   | Elias M Kvalvik  | 15/10/2020 14:25 | 00:00:00       | 17/10/2020 14:24 | Normal   | To do  | Demo One | Task        |
| 231 |        | [Support request] Aurora Ware     | Support request   | Aurora Ware      | 13/10/2020 16:28 | 09:19:59:23    | 30/10/2020 16:27 | High     | To do  | Demo One | Opportunity |
| 227 |        | [Invoice address and Postal ad... | Support request   | Lee A Sanford    | 13/10/2020 16:22 | 10:19:54:00    | 31/10/2020 16:21 | Normal   | To do  | Demo One | Opportunity |
| 226 |        | [Changing Beneficiary informa...  | Claim workflow    | Aurora Ware      | 13/10/2020 16:21 | 02:19:52:23    | 23/10/2020 16:20 | High     | To do  | Demo One | Opportunity |
| 225 |        | [Customer support]                | Support request   | Jonathan M Angel | 13/10/2020 16:17 | 10:19:49:22    | 31/10/2020 16:17 | High     | To do  | Demo One | Opportunity |
| 224 |        | [Support request] Declan B H...   | Claim workflow    | Declan B Herbert | 13/10/2020 16:10 | 10:19:42:01    | 31/10/2020 16:09 | High     | To do  | Demo One | Opportunity |
| 223 |        | [Claim request] Zach Wright       | Claim workflow    | Zach Wright      | 13/10/2020 16:08 | 10:19:40:21    | 31/10/2020 16:08 | Normal   | To do  | Demo One | Finance     |

Item / Page: 10 / 1

**C** DASHBOARD ACCOUNTS SALES & DISTRIBUTION COMMUNICATIONS **WORKFLOWS** ENTITIES All Entities

Cases

3

My case

CASE LIST + My case Select filter

| Id  | Action | Case title                        | Case type         | Entity           | Created date     | Remaining time | Due date         | Priority | Status | Assignee | Queue       |
|-----|--------|-----------------------------------|-------------------|------------------|------------------|----------------|------------------|----------|--------|----------|-------------|
| 243 |        | [Welcome] Amy L Øyen              | Send welcome e... | Amy L Øyen       | 20/10/2020 17:10 | 02:20:40:24    | 23/10/2020 17:09 | Low      | To do  | Demo One | Task        |
| 232 |        | [Support request] Elias M Kvalvik | Support request   | Elias M Kvalvik  | 15/10/2020 14:25 | 00:00:00       | 17/10/2020 14:24 | Normal   | To do  | Demo One | Task        |
| 231 |        | [Support request] Aurora Ware     | Support request   | Aurora Ware      | 13/10/2020 16:28 | 09:19:57:50    | 30/10/2020 16:27 | High     | To do  | Demo One | Opportunity |
| 227 |        | [Invoice address and Postal ad... | Support request   | Lee A Sanford    | 13/10/2020 16:22 | 10:19:52:27    | 31/10/2020 16:21 | Normal   | To do  | Demo One | Opportunity |
| 226 |        | [Changing Beneficiary informa...  | Claim workflow    | Aurora Ware      | 13/10/2020 16:21 | 02:19:50:50    | 23/10/2020 16:20 | High     | To do  | Demo One | Opportunity |
| 225 |        | [Customer support]                | Support request   | Jonathan M Angel | 13/10/2020 16:17 | 10:19:47:49    | 31/10/2020 16:17 | High     | To do  | Demo One | Opportunity |
| 224 |        | [Support request] Declan B H...   | Claim workflow    | Declan B Herbert | 13/10/2020 16:10 | 10:19:40:28    | 31/10/2020 16:09 | High     | To do  | Demo One | Opportunity |
| 223 |        | [Claim request] Zach Wright       | Claim workflow    | Zach Wright      | 13/10/2020 16:08 | 10:19:38:48    | 31/10/2020 16:08 | Normal   | To do  | Demo One | Finance     |

Item / Page: 10 / 1

**C** DASHBOARD ACCOUNTS SALES & DISTRIBUTION COMMUNICATIONS **WORKFLOWS** ENTITIES All Entities

Cases

4 5

Reported by me

CASE LIST + Reported by me Select filter

| Id   | Action | Case title             | Case type    | Entity           | Created date     | Remaining time | Due date        | Priority | Status | Assignee | Queue |
|------|--------|------------------------|--------------|------------------|------------------|----------------|-----------------|----------|--------|----------|-------|
| 2... |        | [Welcome] Amy L Øyen   | Send welc... | Amy L Øyen       | 20/10/2020 17:10 | 02:20:29:12    | 23/10/2020 1... | Low      | To do  | Demo One | Task  |
| 2... |        | [Welcome] American ... | Send welc... | American Appl... | 20/10/2020 17:06 | 00:00:00       | N/A             | N/A      | To do  | N/A      | Task  |

Item / Page: 10 / 1

6

Filter Save Clear

**FILTER**

Keyword  
Welcome

Related records  
Select entity type Search Entity

Status  
Select case status

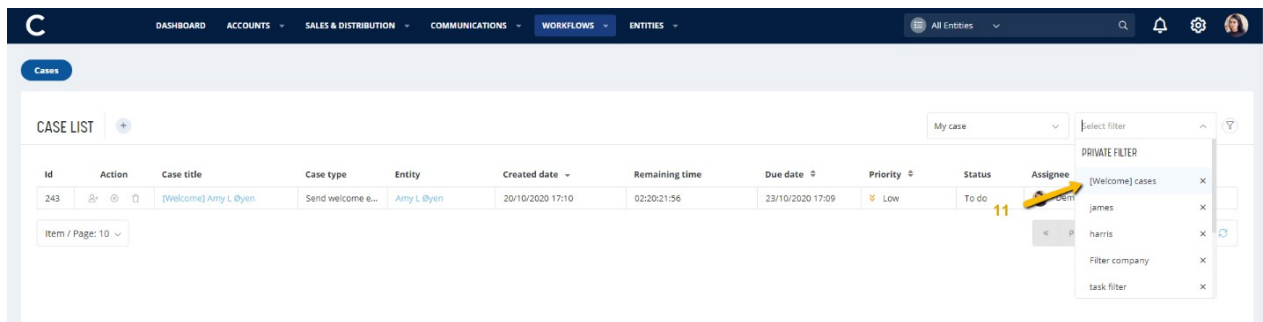
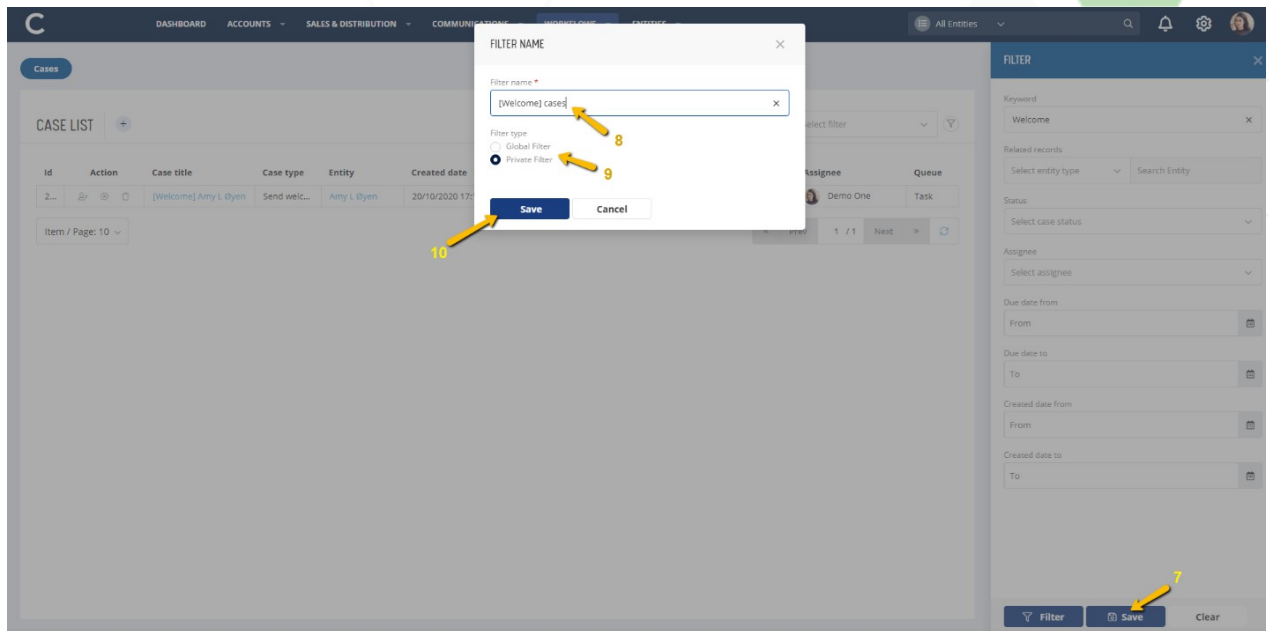
Assignee  
Select assignee

Due date from  
From

Due date to  
To

Created date from  
From

Created date to  
To

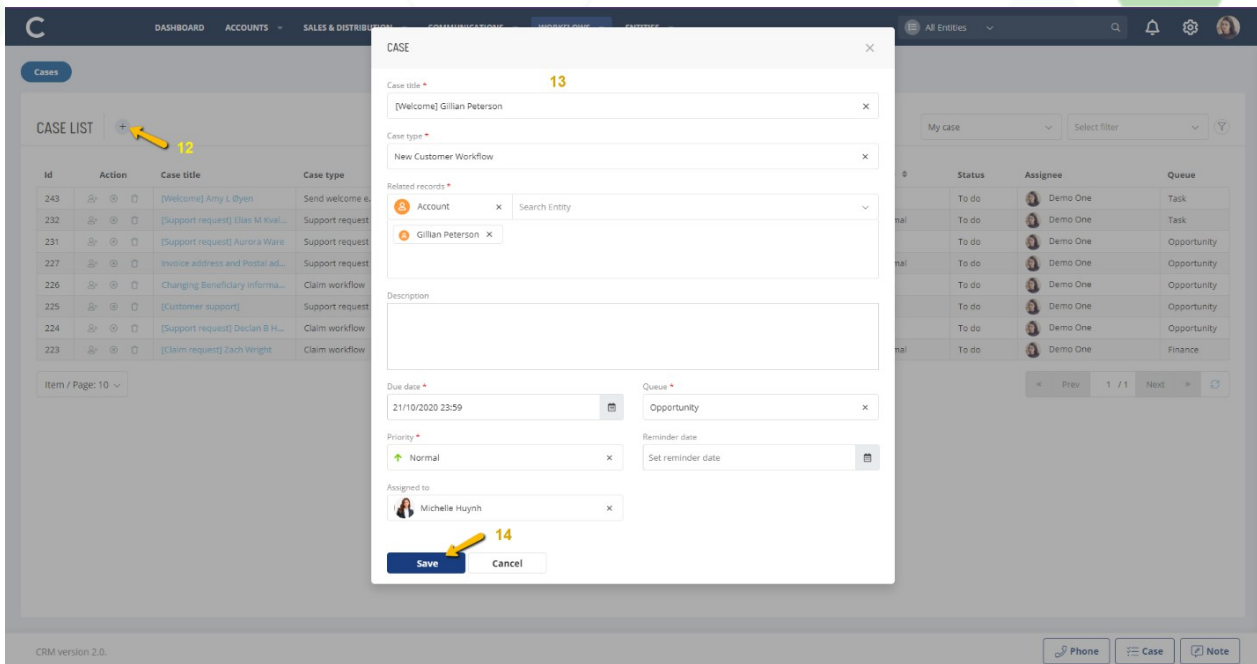


## HOW TO FIND

1. Click WORKFLOWS menu
2. Select "Case Management", it shows a list of "My case" cases by default, they are the cases assigned to the current logged-in user.
3. Use quick-filter to find your cases. Quick-filters consists of "My case", "Reported by me" and Task queues.
- 4 to 6. Use customized-filter to set your search criteria and find cases that match.
- 7 to 11. The customized-filter can be saved and then found as an option at "Select filter" drop down list.

## Create New Case

## SCREENSHOT



## HOW TO FIND

12. Open Create Case form
13. Fill up the form
14. Click Save button

## DESCRIPTION

All the fields in Create Case form are blank by default.

**Case type** is a combo box and shows the list of workflows that are available in the system

**Select entity type** is a combo box and allows the user to select an entity type, e.g. Account, Contact, Lead, etc.

**Search Entity** allows the user to find and select an entity record that belongs to the selected entity type, e.g. Entity type is "Account" then the user can search for accounts, other entities' records (e.g. Leads) won't appear in this box.

**Description** is a free text field. **Due date** is a date-time picker.

**Queue** is a combo box that shows all the task queues to which the logged-in user belongs. **Priority** is a combo box with four options: Low, Normal, High, Critical.

**Assigned to** shows a list of users who belong to the selected queue.

When the **Save button** is clicked, it saves the inputs and the form is closed.

When the **Cancel button** is clicked, it doesn't save the inputs and the form is closed.

# Edit Case

## SCREENSHOT

| Id  | Action | Case title                        | Case type          | Entity                 | Created date     | Remaining time | Due date         | Priority | Status | Assignee       | Queue       |
|-----|--------|-----------------------------------|--------------------|------------------------|------------------|----------------|------------------|----------|--------|----------------|-------------|
| 245 |        | [Welcome] Gillian Peterson        | New Customer ...   | Gillian Peterson       | 20/10/2020 20:59 | 01:02:49:06    | 21/10/2020 23:59 | Normal   | To do  | Michelle Huynh | Opportunity |
| 243 |        | [Welcome] Amy L Olyn              | Send welcome e...  | Amy L Olyn             | 20/10/2020 17:10 | 02:19:59:50    | 23/10/2020 17:09 | Low      | To do  | Demo One       | Task        |
| 242 |        | [Welcome] American Appliance      | Send welcome e...  | American Appliance     | 20/10/2020 17:06 | 00:00:00       | N/A              |          | To do  | N/A            | Task        |
| 235 |        | [Support request] Land Indust...  | Support request    | Land Industry Compl... | 15/10/2020 15:00 | 00:00:00       | 20/10/2020 14:59 | Normal   | To do  | Michel Nguyen  | Task        |
| 234 |        | [Claim Request] Land Indust...    | Claim process [v3] | Land Industry Compl... | 15/10/2020 14:58 | 00:00:00       | 17/10/2020 14:57 | High     | To do  | Michel Nguyen  | Task        |
| 232 |        | [Support request] Elias M Kval... | Support request    | Elias M Kvalvik        | 15/10/2020 14:25 | 00:00:00       | 17/10/2020 14:24 | Normal   | To do  | Demo One       | Task        |
| 231 |        | [Support request] Aurora Ware     | Support request    | Aurora Ware            | 13/10/2020 16:28 | 09:19:17:16    | 30/10/2020 16:27 | High     | To do  | Demo One       | Opportunity |
| 227 |        | [Invoice address and Postal ad... | Support request    | Lee A Sanford          | 13/10/2020 16:22 | 10:19:11:53    | 31/10/2020 16:21 | Normal   | To do  | Demo One       | Opportunity |
| 226 |        | [Changing Beneficiary informa...  | Claim workflow     | Aurora Ware            | 13/10/2020 16:21 | 02:19:10:16    | 23/10/2020 16:20 | High     | To do  | Demo One       | Opportunity |
| 225 |        | [Customer support]                | Support request    | Jonathan M Angell      | 13/10/2020 16:17 | 10:19:07:15    | 31/10/2020 16:17 | High     | To do  | Demo One       | Opportunity |

**[WELCOME] GILLIAN PETERSON**  
Case type: text

Status: Not started | Priority: Normal  
Assigned to: Michelle Huynh | Reminder date: N/A  
Due date: 21/10/2020 23:59 | Related to: Gillian Peterson, 109, 107, 104, 101, 99, 80, 78, 76, 74, 72  
Description: No Description

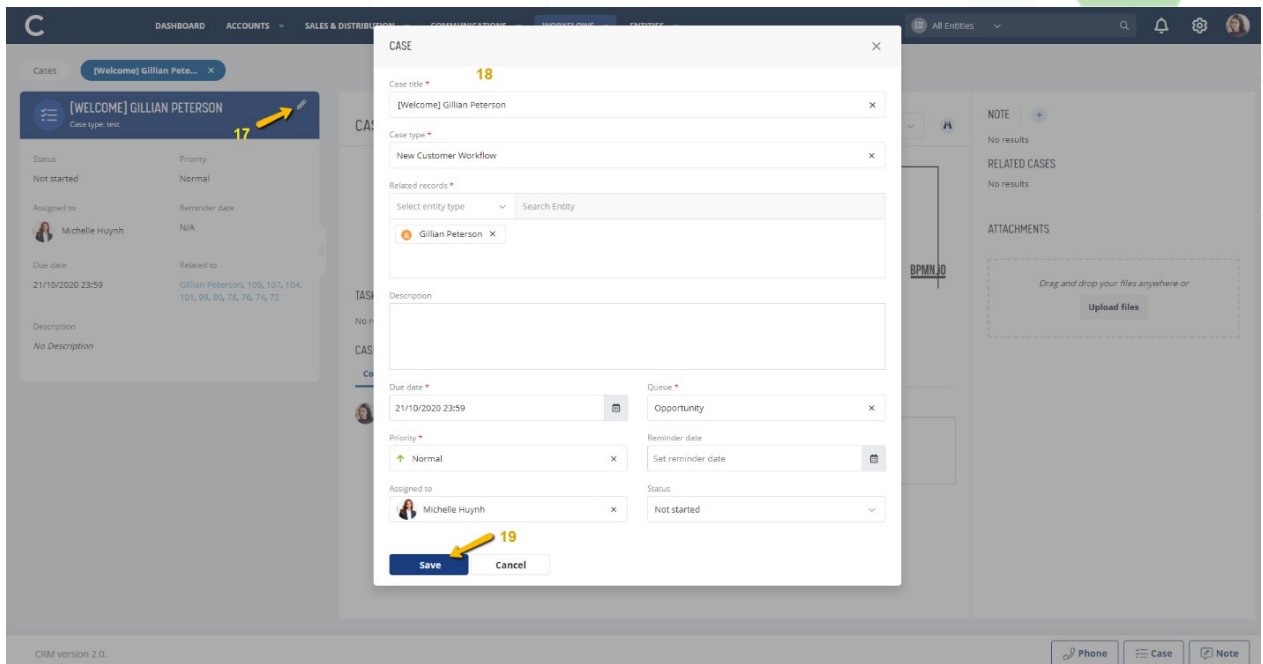
**CASE ACTIVITIES** | Case Status: Not started

**TASK**  
No results

**CASE ACTIVITIES**  
Comments | Case history

Comment

ATTACHMENTS  
Drag and drop your files anywhere or  
Upload files

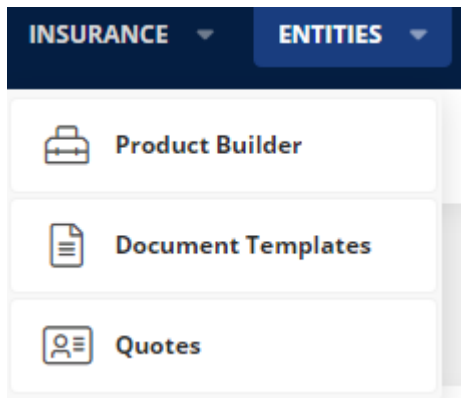


## HOW TO FIND

15. Click the Case Title
16. It shows the Case Details page
17. Open Edit Case form
18. Make valid amendment/update
19. Click Save button to save the updates or click Cancel to close the form without saving anything.

## 2.9 Insurance

### Module Insurance

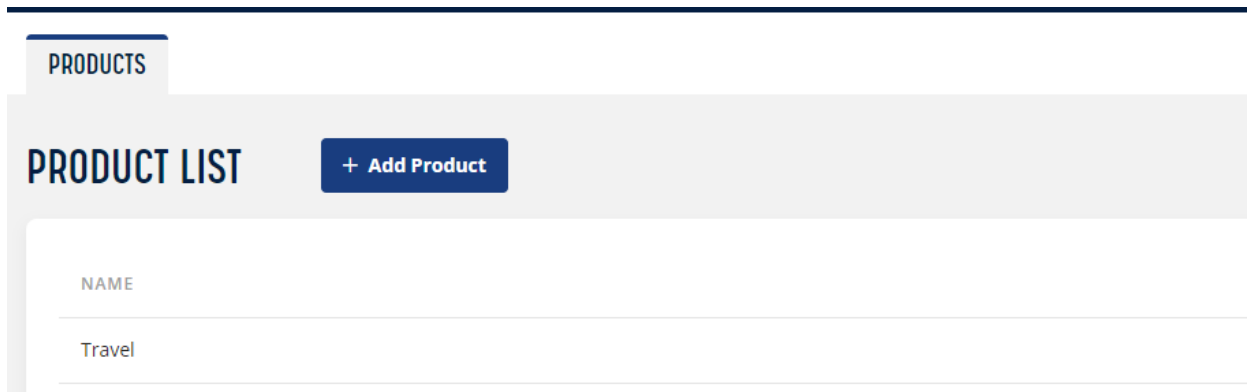


- Menu “Product Builder” - details in section [Product Builder](#)
- Menu “Document Templates” - details in section [Document Templates](#)
- Menu “Quotes” - details in section [Quotes](#)

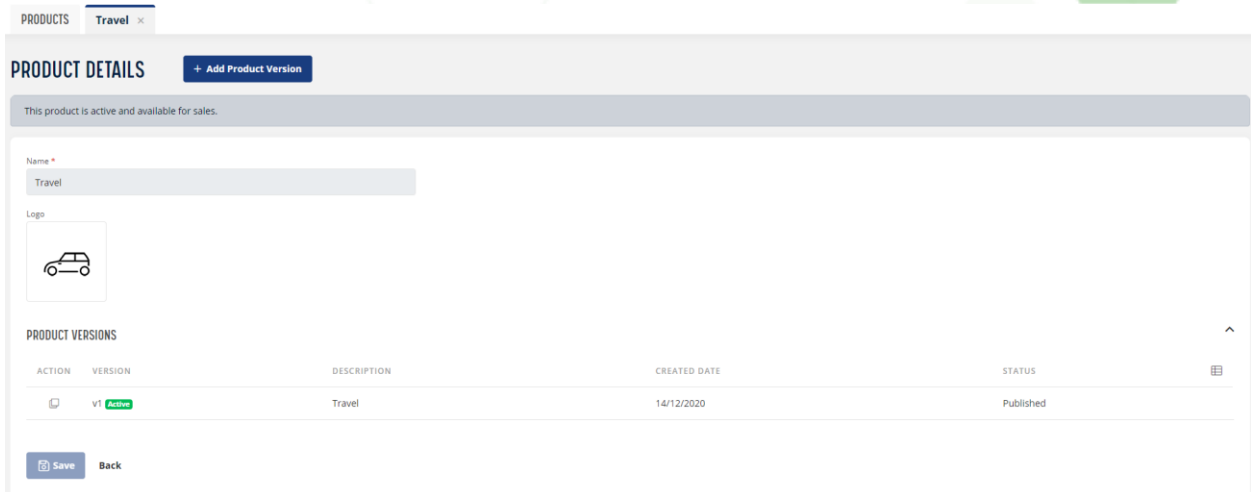
### 2.10.1 Product Builder

“Product Builder” is the module to manage insurance products which includes building new products, launching new products, or creating new product versions, etc.

When clicking on the menu “Product Builder”, all products should be displayed, as shown below.



Clicking on product name would open up a new tab with details:



- Users should be able to perform:
  - Create new product version - see detail at section [Add new product version](#)
  - Clone existing product version - see detail at section [Clone existing product version](#)
- If the product is currently available for sales, a notification would be displayed on the top of the page - as shown above.

### 2.10.1.1 Add new products

Clicking on the button “Add Product” would open a new tab, in which users must fill in required fields for new products creation.

## PRODUCT DETAILS

Name \*

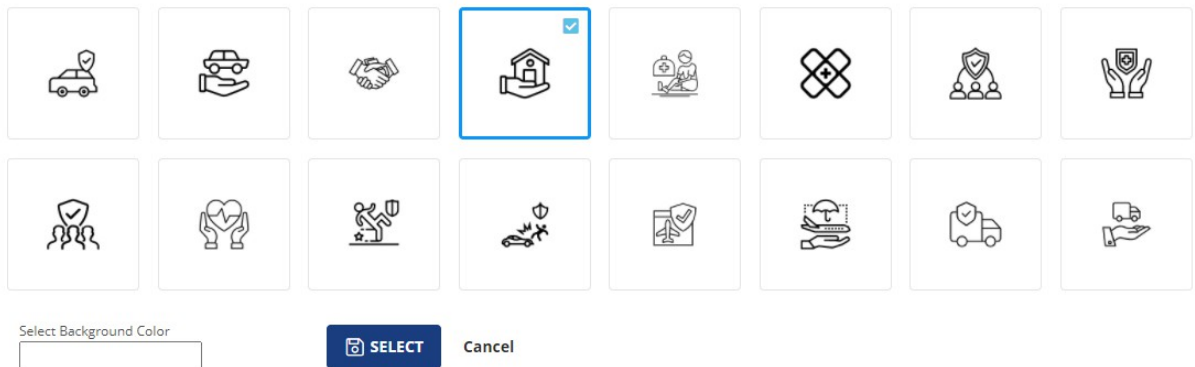
Logo

**Select another logo****Save****Back**

- Product name must be filled.
- Product logo can be selected in a gallery when clicking on button "Select another logo"



## SELECT ICON



- Selected product icon would have the green tick on the top right.
- Users should be able to change background colour via the color picker “Select background color”.

## SELECT ICON



- The selected product icon and background color will be displayed in the [Product selection page](#) as long as the new product is published.

### 2.10.1.2 Add new product versions

After saving the new product, the button “Add new product version” should appear.

Clicking on “Add new product version” opens product version details page:

PRODUCTS **Spesial** ×

## PRODUCT SPESIAL <NEW VERSION>

GENERAL DOCUMENTS SALES PROCESS MULTIPLE RISKS ADVANCED

### GENERAL INFORMATION

Description

Description

Upload New Lookup

Currency

GBP

Product Commission (%)

0

Sales Commission (%)

0

There're 5 tabs:

- General: includes the information of product version such as description, lookup file, currency, product commission and sales commission.
- Description: short description of the product version
- Lookup file: an excel file defining which answer matches which factor value for premium calculation. Example:

|   | A    | B       | C          | D              | E              | F                 | G            | H |
|---|------|---------|------------|----------------|----------------|-------------------|--------------|---|
| 1 | From | Context | Occupation | WorkInjury5001 | Invalidity5002 | ExtraCoverage5003 | HomeWork5004 |   |
| 2 |      |         | Yes        |                | 1              | 1                 | 1            | 1 |
| 3 |      |         | No         |                | 0              | 0                 | 0            | 0 |
| 4 |      |         |            |                |                |                   |              |   |

- Currency: each product can only have one currency. Seamless currently supports up to 11 currencies which are: AUD, CAD, DKK, EUR, GBP, JPY, NOK, SEK, SGD, USD, VND.

- Product commission (%): here defines the default percentage at Product Commission that user can adjust during quotation process.
- Sales commission (%): here defines the default percentage at Sales Commission that user can adjust during quotation process.

- Documents:

This section defines email and document template for the current product version. When generating emails/documents for quotes/policies that are created for this product, the selected template should be used. Details about templates are available in [section Document templates](#).

Email attachments like Terms and Condition and other static document can be setup here as well.

PRODUCTS Spesial x

## PRODUCT SPESIAL <NEW VERSION>

GENERAL DOCUMENTS SALES PROCESS MULTIPLE RISKS ADVANCED

### DOCUMENTS

Document Template:

Select Document Template

Email Template:

Select Email Template

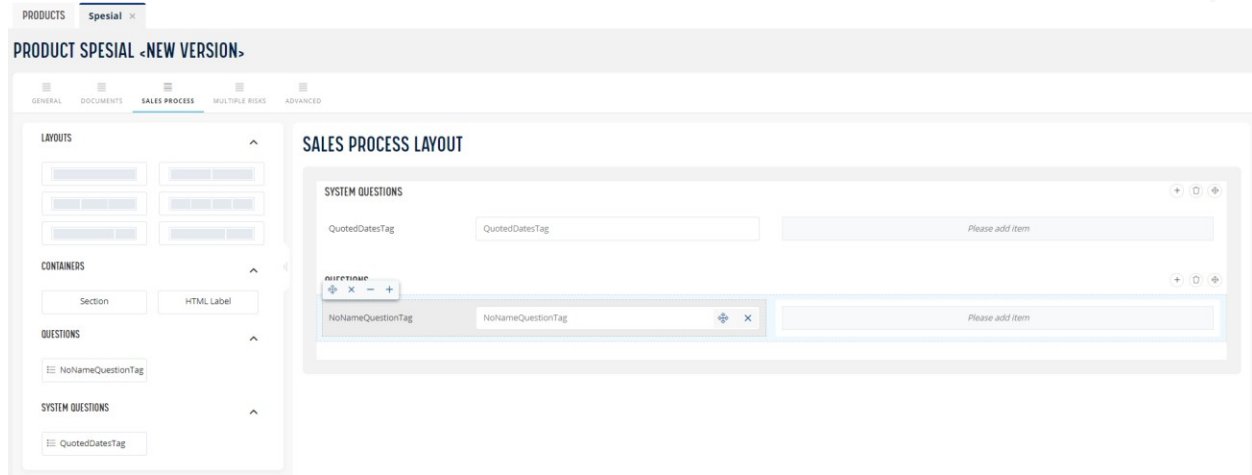
Terms And Condition Document:

Drag and drop your file anywhere or Upload file

Static Attachments:

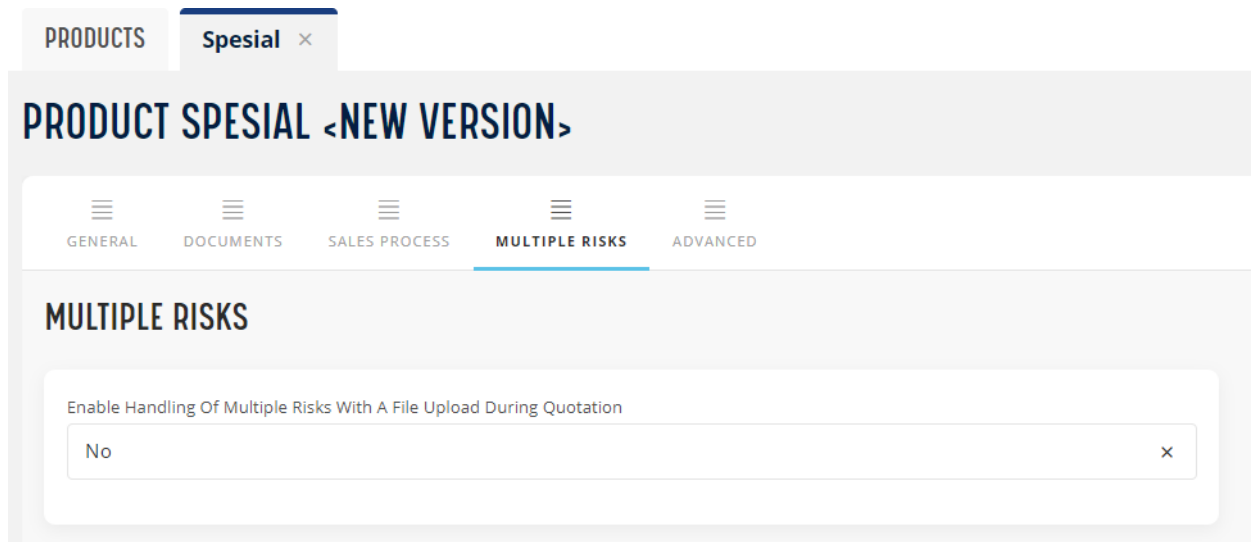
Drag and drop your files anywhere or Upload files

- Sales process: users can modify the layout of questions that are included in the current product version.



- Multiple risks:

The brand-new product version is for single insured object by default.



Users can turn it to multiple insured object product by select Yes and fill up these setup fields:

GENERAL DOCUMENTS SALES PROCESS **MULTIPLE RISKS** ADVANCED

### MULTIPLE RISKS

Enable Handling Of Multiple Risks With A File Upload During Quotation

Yes ✕

UploadReference

UploadReferenceTag ✕

PremiumReportingColumn

Premium

ErrorReportingColumn

Errors

MinNumberOfRows

2


ErrorMessageForTableRows

Number of insured objects should be 2 at least.

ErrorMessageForTableStructure

Missing '{0}' Column for {1}

Upload File Template:

 Drag and drop your files anywhere or [Upload files](#)

Once a product version is saved, it can be found at Product Details page

PRODUCTS **Worker Compensa...** ✕

### PRODUCT DETAILS


[+ Add Product Version](#)

This product is active and available for sales.




Name \*

Worker Compensation Act (WCA)

Logo



#### PRODUCT VERSIONS

| ACTION  | VERSION                 | DESCRIPTION  | CREATED DATE | STATUS    |
|---|-------------------------|--|--------------|-----------|
|  | v10 <span>Active</span> | [SASS-8125] WCA/PA Full Time - Tariff - Not matched with spec    | 26/05/2021   | Published |
|  | v9                      | [SAAS-7694] - Origo - Update product WCA and PA Full time, ad... | 24/05/2021   | Published |
|  | v8                      | [SAAS-7430] - Origo - Free text field at policy level            | 11/05/2021   | Published |

- Product version status:
  - Draft: users are still able to modify product version information at this state
  - Published: users should not be able to modify.
  - Active: product version is under sales. At the time, only one product version is active.
- When a new product version is published:
  - Previous version (if have) should be set to “Published”
  - New product version should be set to “Published” and “Active”

### 2.10.1.3 Add product to sales channels

Users/Product builders should define products should be sold under which sales channels, so that when users would like to create quotes for that product, they should go to the defined sales channel.

How to add products to sales channels? - see details at section [Sales Channels](#)

### 2.10.1.4 Clone existing product version

When clicking on the button to clone an existing product version, a new product version is created based on the selected version.

- Tab General, Sales Process, Advanced: initial values should be carried over from the cloned product version.
- Users should be able to modify product version information until the new version is published.

## 2.10.2 Document Templates

Document templates are used to generate documents when customers purchase a policy or request for a proposal. Some placeholders are provided, and users can create templates for specific product versions by using placeholders.

When clicking on the menu “Document templates”, the list of templates should be displayed, as shown below:

| NAME                  | TEMPLATE TYPE | LAST MODIFIED | PARTIAL TEMPLATE |
|-----------------------|---------------|---------------|------------------|
| Drone PL Template     | pdf           | a day ago     | No               |
| Drone CL Template     | pdf           | a day ago     | No               |
| Drone Template Footer | pdf           | 2 days ago    | Yes              |
| Drone Template Footer | pdf           | 2 days ago    | Yes              |

- Button “Add Templates”: create a new document template. This would trigger opening up an empty document template detail page.
- Clicking on the document template name would open up a new tab, and tab name is the name of the selected document template.

TEMPLATES **Drone PL Template** ×

## DOCUMENT TEMPLATE DETAILS

Name: Drone PL Template    Template Type: PDF ×    Encoding: 0

Display Name: Enter value with pattern

Settings: {"PageSize":"A4","PageOrientation":"Portrait","MarginLeft":0,"MarginTop":0,"MarginRight":0,"MarginBottom":0,"HeaderHeight":0,"FooterHeight":15}

Description: Enter description with pattern

Partial Template:

Header Template:    Footer Template: Drone Template Footer ×

Content:

```
<!DOCTYPE html>
<html lang="en">
<head>
  <link rel="stylesheet" href="style.css" />
</head>
<body>
  @if (Model.DocumentContext.DocumentUsage == "NewBusiness" || Model.DocumentContext.DocumentUsage == "MTA" || Model.DocumentContext.DocumentUsage == "Renewal")
```

- **Name:** the name of the document template that would be displayed in the list, and also in dropdown template in [product version details](#).
- **Encoding:** this value is set default by the system.
- **Template type:** this indicates the type of document such as PDF, Email, SMS. This also affects the generated document from this template.
  - If the type is PDF, generated document should be in PDF format
  - If the type is Email, generated document should be in HTML format
  - If the type is Email, generated document should be in TXT format
- **Display name:** this defines the document file name, placeholder is accepted.
- **Settings:** this defines the layout format for generated documents, and it is hard-coded by the system currently.
- **Partial template:** if ticked, the template is available for other template to use. It appears as an option of Header Template and Footer Template.
- **Content:** this defines the content of generated documents. Contents should be composed in RAZOR/CSHTML.

### 2.10.3 Quotes (Anonymous quotes)

This quote list only contains quotes that are not created for any specific customers (known as anonymous quotes).

## QUOTE LIST

[+ Create](#)

| ACTION | REFERENCE | DESCRIPTION  | PRODUCT          | POLICY TERM           | PREMIUM    | SALES PERSON    | ORGANIZATION    | STATUS    |  |
|--------|-----------|--------------|------------------|-----------------------|------------|-----------------|-----------------|-----------|--|
|        | 506157    | Gillian Ltd. | Worker Com...    | 30/05/2021-29/05/2022 | 330.87 NOK | Gillian Pham    | contemi-testing | Completed |  |
|        | 506118    | N/A          | Health - Test... | 29/05/2021-28/05/2022 | ---        | Contemi Testing | contemi-testing | Expired   |  |
|        | 506117    | N/A          | Group Life       | 29/05/2021-28/05/2022 | ---        | Contemi Testing | contemi-testing | Expired   |  |
|        | 506111    | N/A          | Group Life       | 29/05/2021-28/05/2022 | ---        | Contemi Testing | contemi-testing | Expired   |  |
|        | 506116    | N/A          | Drone Com...     | 29/05/2021-28/05/2022 | ---        | Contemi Testing | contemi-testing | Expired   |  |
|        | 506104    | N/A          | Disability       | 29/05/2021-28/05/2022 | ---        | Contemi Testing | contemi-testing | Expired   |  |
|        | 506110    | N/A          | Personal Ac...   | 29/05/2021-28/05/2022 | ---        | Contemi Testing | contemi-testing | Expired   |  |
|        | 506103    | N/A          | Drone Perso...   | 29/05/2021-28/05/2022 | ---        | Contemi Testing | contemi-testing | Expired   |  |
|        | 506107    | N/A          | Disability       | 29/05/2021-28/05/2022 | ---        | Liam Nguyen     | contemi-testing | Expired   |  |
|        | 506106    | N/A          | Worker Com...    | 29/05/2021-28/05/2022 | ---        | Liam Nguyen     | contemi-testing | Expired   |  |

Item / Page: 10 Total 350 records

[«](#)
[Prev](#)
[1 / 35](#)
[Next](#)
[»](#)
[↻](#)

### 2.10.3.1 Create/edit anonymous quote

Clicking on the button “Create” will create a new quote without customer information required. When creating a quote:

- Select product



QUOTES

Creating Quote ×

## SELECT A PRODUCT

Sales Channel

All Sales Channel



### CHANNEL ONE

No available products.

### INBOUND



Domestic Travel



Travel

- Questions: after selecting the product, "Questions" page is shown (as below) with all questions defined in the product definition for that product.

## CREATE QUOTE



Questions



Review



Acceptance

QUOTE REF.: 500156

Created Date: a few seconds ago  
Last Edited date: a few seconds ago

### INSURANCE INFORMATION

Start Date \*

12/5/2020

End Date \*

12/4/2021

### INSURED PERSON

Name \*

Enter Name

InsuredPersonAgeTag \*

18

### Insurance Information

Insured Person

Travellers

Covers

## ● Review

## CREATING QUOTE

Calculate

Process Jobs

Generate Document



Questions



Review



Acceptance

QUOTE REF.: 500154 *(Quote will be expired in 30 days)*

Created Date: 2 hours ago  
Last Edited date: a few seconds ago

### INSURANCE INFORMATION

Policy Term: 05/12/2020-04/12/2021

Expiry Date: 03/01/2021

### COVER BREAKDOWN

| COVER          | PREMIUM    | IPT        |
|----------------|------------|------------|
| Luggage        | 460.40 CAD | N/A        |
| UnableToTravel | 428.00 CAD | 107.00 CAD |

### PREMIUM

Total Premium Incl. Tax: 995.40 CAD

Back To Quotes List

Back

Accept

### Insurance Information

Cover Breakdown

Premium

### QUOTE DOCUMENTS

Download

## ● Acceptance:

## CREATING QUOTE

Questions Review Acceptance

### SELECT PAYMENT METHOD

### QUOTES READY FOR PURCHASE

CURRENCY: CAD

| QUOTE REF. | PRODUCT         | POLICY TERM           | LAST MODIFIED DATE | PREMIUM    |
|------------|-----------------|-----------------------|--------------------|------------|
| ↓ 500154   | Domestic Travel | 05/12/2020-04/12/2021 | a few seconds ago  | 995.40 CAD |

[Back To Quotes List](#)

[Back](#)

[Purchase](#)

### OTHER AVAILABLE QUOTES

| QUOTE REF. | PRODUCT | POLICY TERM           | LAST MODIFIED DATE | PREMIUM    |
|------------|---------|-----------------------|--------------------|------------|
| ↑ 500100   | Travel  | 22/12/2020-30/11/2021 | 2 days ago         | 824.66 GBP |

## 2.10.1.1 Shopping cart

### YOUR CART

PRODUCT: DOMESTIC TRAVEL - REF.: 500154 ^

Total Premium Incl. Tax 995.40 CAD

Total Amount 995.40 CAD

## 2.10.3.2 Attach anonymous quotes to a specific customer

### ADD CUSTOMER ×

#### CUSTOMER LIST

|                       | NAME                      | SSN/ORG NO. |  |
|-----------------------|---------------------------|-------------|--|
| <input type="radio"/> | <b>JN</b> Jolie Nguyen    | 93346321278 |  |
| <input type="radio"/> | <b>JN</b> Jolie Nguyen    | 21760947309 |  |
| <input type="radio"/> | <b>GN</b> Giang Nguyen    | N/A         |  |
| <input type="radio"/> | <b>JN</b> Jolie Nguyen    | 17654445937 |  |
| <input type="radio"/> | <b>JN</b> Jolie Nguyen    | 08070234714 |  |
| <input type="radio"/> | <b>JN</b> Jolie Nguyen    | 18278739226 |  |
| <input type="radio"/> | <b>JN</b> Jolie Nguyen    | 55867207557 |  |
| <input type="radio"/> | <b>JN</b> Jolie Nguyen    | 09487608296 |  |
| <input type="radio"/> | <b>GN</b> Giang Nguyen    | N/A         |  |
| <input type="radio"/> | <b>&amp;</b> Brooke Perry | N/A         |  |

Item / Page: 10 ▾      << Prev 1 / 31 Next >> ↺

**SELECT**    Cancel

## 2.10 Global assistants

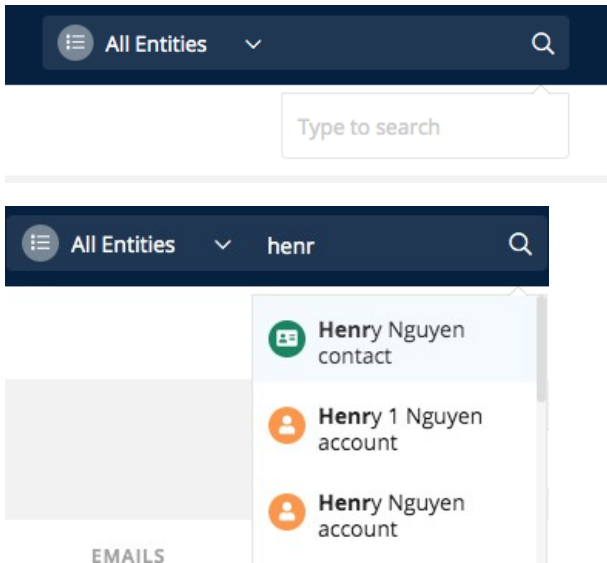
### 2.10.1 Global Search

#### MAIN FUNCTION

This feature allows you to perform the search quickly across multiple entities by inputting a keyword in the Search field. Or you can search across multiple entities or on a specific Entity.

Supported entities: Account, Contact, Lead, Sales, Cases, Notes

## SCREENSHOTS



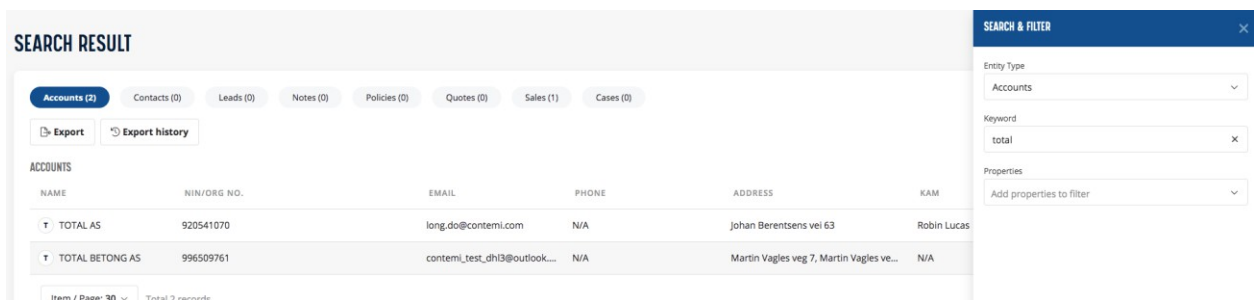
## DESCRIPTION

Basic search:

1. Input a keyword into the search field.
2. The system will return the search results with entities which match the keyword.
3. All Entities is selected as default. If you want to search on a specific entity, select that entity and input data in the search field.

Advanced search:

1. Input a keyword into the search field
2. Press Enter
3. The system will return the search results as below



Account is the default Entity.

A filter panel is opened automatically on the right hand side.

4. You can select Search criteria on the Properties field to search. The search criterias varies according to the Entity

**FILTER** ✕

Entity Type  
Account ▾

Keyword  
ashley ✕

Properties  
Name ✕ Email ✕ ✕

- Name
- Org.No/NIN
- Email
- Phone
- KAM

### 2.10.2 Global Case

#### MAIN FUNCTION

This function allows you to create a Case right away while you're handling some other tasks in the system.

## SCREENSHOT

**CASE** ✕

Case Title \*  
Enter title

Case Type \*  
Select case type

Related Records \*  
Select entity type Search Entity

Description

Due Date \* Set due date Queue \* Select queue

Priority \* Select Priority Assigned To Select assignee

**Save**

Phone **Case** Note

## DESCRIPTION

In order to create a case from Global case menu

1. Click on **Case** on the bottom right corner.
2. Enter data into below fields in Create Case form.
3. Click **Save**

**Case type** is a combo box and shows the list of workflows that are available in the system

**Select entity type** is a combo box and allows the user to select an entity type, e.g. Account, Contact, Lead, etc.

**Search Entity** allows the user to find and select an entity record that belongs to the selected entity type, e.g. Entity type is "Account" then the user can search for accounts, other entities' records (e.g. Leads) won't appear in this box.

**Description** is a free text field. **Due date** is a date-time picker.

**Queue** is a combo box that shows all the task queues to which the logged-in user belongs. **Priority** is a combo box with four options: Low, Normal, High, Critical.

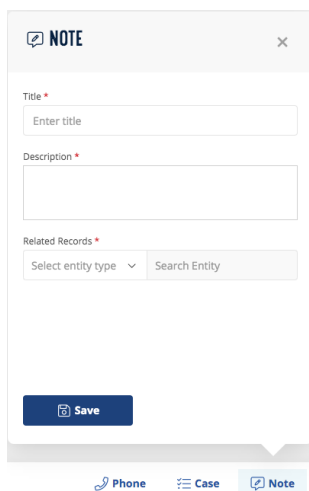
**Assigned to** show a list of users who belong to the selected queue.

### 2.10.3 Global Note

#### MAIN FUNCTION


This function allows you to create a note right away while you're handling some other tasks in the system.

#### SCREENSHOTS



#### DESCRIPTION

In order to create a case from Global case menu

4. Click on  on the bottom right corner.
5. Enter data into below fields in Create Note form.



## 6. Click **Save**

Title: is a free text field Description: is a free text field **Select entity type** is a combo box and allows the user to select an entity type, e.g. Account, Contact, Lead, etc.

**Search Entity** allows the user to find and select an entity record that belongs to the selected entity type, e.g. Entity type is "Account" then the user can search for accounts, other entities' records (e.g. Leads) won't appear in this box.

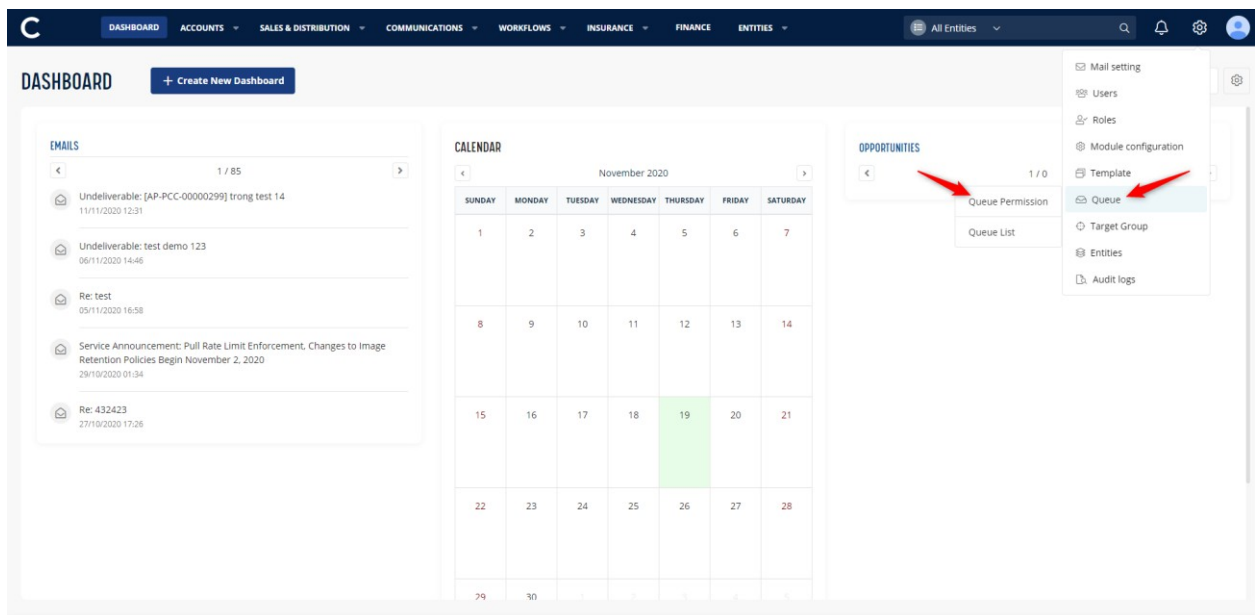
## 2.10.4 Queue

### 2.10.4.1 Queue permissions.

#### MAIN FUNCTION

This feature allows you to configure the permissions of the members in queues. There are 2 predefined roles: Member and Supervisor.

#### SCREENSHOT



## ROLES &amp; PERMISSIONS

| PERMISSIONS                     | SUPERVISOR                          | MEMBER                              |
|---------------------------------|-------------------------------------|-------------------------------------|
| Edit role                       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Edit sub-task                   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Create sub-task                 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Delete case                     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Attach/remove document          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Assign case to someone in queue | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Edit case                       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Create case                     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

## ROLES &amp; PERMISSIONS

| PERMISSIONS                          | MEMBER                   | SUPERVISOR               |
|--------------------------------------|--------------------------|--------------------------|
| View dashboard                       | <input type="checkbox"/> | <input type="checkbox"/> |
| Edit roles                           | <input type="checkbox"/> | <input type="checkbox"/> |
| View status of all people in queue   | <input type="checkbox"/> | <input type="checkbox"/> |
| Add user and assign role to user     | <input type="checkbox"/> | <input type="checkbox"/> |
| Transfer the call to another person  | <input type="checkbox"/> | <input type="checkbox"/> |
| See call logs of all people in queue | <input type="checkbox"/> | <input type="checkbox"/> |
| See own call logs                    | <input type="checkbox"/> | <input type="checkbox"/> |
| View live call list                  | <input type="checkbox"/> | <input type="checkbox"/> |
| Make outbound call                   | <input type="checkbox"/> | <input type="checkbox"/> |
| Connect to phone queue               | <input type="checkbox"/> | <input type="checkbox"/> |

## HOW TO FIND

- Enter the url for the system into the browser and log in
- Click on Management icon, click on Queue > Queue permission [DESCRIPTION](#)
- There are two types of queues: Case queue and Phone queue There are two predefined roles: Member and Supervisor.

The user can manage (add/remove) permissions for Member and Supervisor roles of Case queues and Phone queues.

## HOW TO ADD PERMISSIONS TO ROLE

1. Open Roles & Permissions page
2. Tick/Untick on tickbox  to add/remove a permission. Case queues permissions:
  - Create case
  - Edit case
  - Assign case to someone in queue
  - Attach/remove document
  - Delete case
  - Create sub-task
  - Edit sub-task

Phone queues permissions:

- Make outgoing call
- View live call list
- Add user and assign role to user
- View status of all people in queue

### 2.10.4.2 Que

ue permissions.

Queue lists.

### SCREENSHOT

The screenshot shows the Seamless Insure dashboard interface. At the top, there is a navigation bar with various menu items: DASHBOARD, ACCOUNTS, SALES & DISTRIBUTION, COMMUNICATIONS, WORKFLOWS, INSURANCE, FINANCE, ENTITIES, and All Entities. Below the navigation bar, the dashboard is divided into three main sections: EMAILS, CALENDAR, and OPPORTUNITIES. The EMAILS section shows a list of email messages. The CALENDAR section displays a monthly calendar for November 2020. The OPPORTUNITIES section shows a list of opportunities. On the right side of the dashboard, there is a vertical navigation menu with several options: Mail setting, Users, Roles, Module configuration, Template, Queue, Target Group, Entities, and Audit logs. The 'Queue' option is highlighted in blue, and a red arrow points to it. Below the 'Queue' option, there is a sub-menu with two items: 'Queue Permission' and 'Queue List', both of which are also highlighted in blue and have red arrows pointing to them.

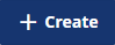
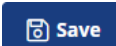
## HOW TO FIND

- Enter the url for the system into the browser and log in
- Click on Management icon, click on Queue then select Queue List **DESCRIPTIONS**  
There are two types of queues: Case queue and Phone queue.




On the Queue list, users can view all the existing queues of the system.

You can create new queues, add users into queues and assign roles to the users in Queue so that the users can perform the actions.

## CREATE QUEUE

- Click the  button on the Queue List page then Create Queue form is displayed.
- Name: This is a mandatory and free text field
- Type: A drop-down list with two options: Phone and Task. This is a mandatory field.
- Owner: A drop-down list with all the available users. This is a mandatory field.
- Description: A free text field, the user can input more information/description for the queue. This is not a mandatory field.
- After inputting all the mandatory fields, user can click  button to create a new queue or click **Cancel** to cancel creating the queue. When a queue is created successfully, it will be listed in the queue list.

## QUEUE LIST

- The queue list is filtered and displayed the list that the user owns or belongs to. Users can view other queues by selecting Other queue...
- Search queue: user can search for a queue by queue's name.
- Action: Delete/Edit   users can click these buttons to delete/edit a queue from the queue list.
- Name
- Description
- Owner
- Created date
- Status: Active/Inactive.
- Click  to config which column will be shown on Queue List: Id, Action, Name, Description, Group, Owner, Created Date, Status.

## QUEUE DETAILS/ MANAGE QUEUE MEMBERS

| ID | ACTION | NAME               | DESCRIPTION                           | GROUP | OWNER      | CREATED DATE     | STATUS   |
|----|--------|--------------------|---------------------------------------|-------|------------|------------------|----------|
| 20 |        | Task Queue_1296    | N/A                                   | Asd   | Demo One   | 20/08/2020 12:32 | Inactive |
| 26 |        | Customer support   | N/A                                   | Asd   | Demo One   | 09/10/2020 18:40 | Inactive |
| 1  |        | Opportunity        | testing description                   | Asd   | Cuong Ly   | 17/01/2020 18:45 | Active   |
| 2  |        | Contact            | N/A                                   | N/A   | Demo One   | 17/01/2020 18:45 | Active   |
| 18 |        | Phone queue_1403_3 | N/A                                   | N/A   | Demo One   | 12/08/2020 16:34 | Inactive |
| 12 |        | G phone queue 1    | cpc1220 testing CPC-1881, edit        | N/A   | Demo One   | 06/08/2020 11:59 | Inactive |
| 28 |        | J Phone Queue 1    | Test Phone queue - Call configuration | N/A   | Joyce Test | 28/10/2020 17:46 | Inactive |

| ACTION | FULLNAME   | USERNAME  | ROLE | STATUS       |
|--------|------------|-----------|------|--------------|
|        | Demo One   | demoone   | N/A  | Disconnected |
|        | Joyce CVN  | joycecvn  | N/A  | Disconnected |
|        | Joyce Test | joycetest | N/A  | Disconnected |


  

| ACTION | FULLNAME      | USERNAME      |
|--------|---------------|---------------|
| +      | tony.vu       | tony.vu       |
| +      | Ami Trinh     | AmiTran       |
| +      | Ashley Nguyen | ashley        |
| +      | Caprock Admin | caprock.admin |



- Users can access the Queue details page by clicking Queue Name.
- Users can open multi queues at the same time.
- Queue info-box will show queue name, type, queue owner, group, number of members in queue and queue description.

**Queue members section** shows the list of members that belong to the queue.

- Click at the Action column to remove a member from the queue.

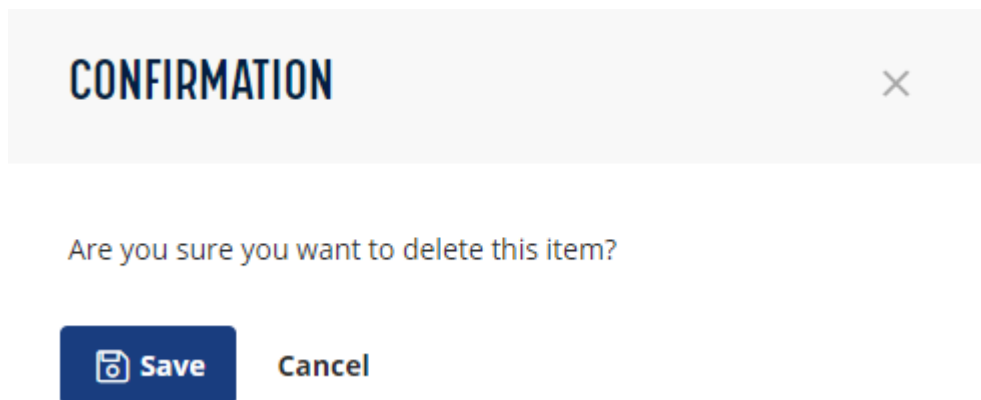
- Select a role (Supervisor/Member) from Role drop-down to assign a role for a member in the queue.
- Click  to config which column will be shown on the Queue Members section: Action, FullName, Username, Role, Status.

**Add members section:** shows the list of members that don't belong to the queue.

- Click  at the Action column to add a member to the queue, then the member will disappear in the Add Members section and appear in Queue Members.
- Click  to config which column will be shown on the Add Members section: Action, FullName.


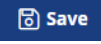

#### DELETE QUEUE

- Click  then a confirmation pop-up is displayed.



- Click  to delete the queue.
- Click  to cancel.

#### EDIT QUEUE

- User can edit queue details directly from queue list by clicking  at the Action column, then the Edit Queue form will be displayed. User can update the information of the queue then click  to update the change and click  to cancel updating.
- Users can also edit queue details by clicking the Edit button on the Queue info-box, Edit Queue form will be displayed, and the user can update the information of the queue.

## 2.3 Entity

### MAIN FUNCTION

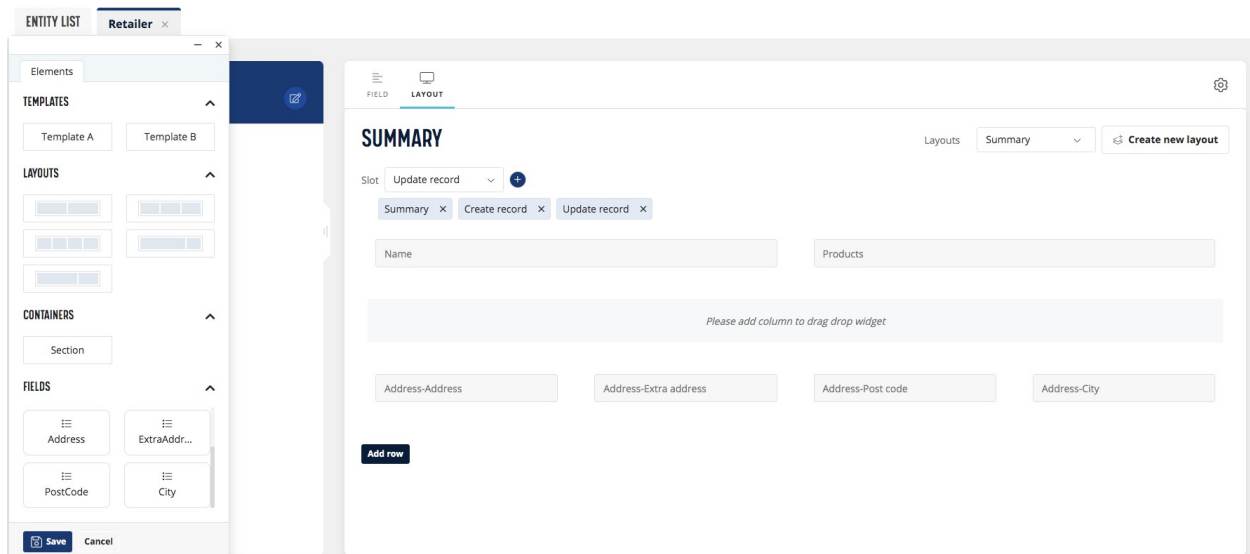
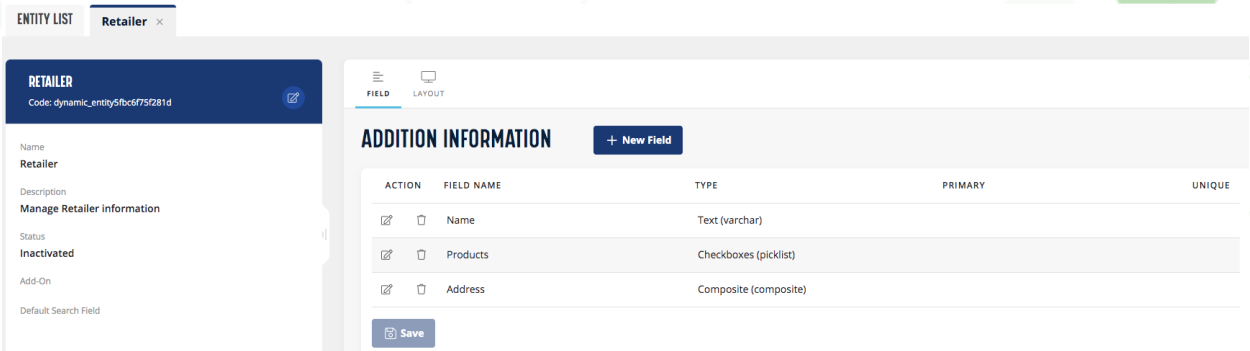
Entity module allows you to manage the primary and dynamic objects such as custom fields, page layouts.

Primary objects are the objects that are available in the system such as Account, Lead. Dynamic object is one that you created.

### SCREENSHOT

The screenshot displays the 'ENTITY LIST' interface. At the top, there is a breadcrumb 'ENTITY LIST' and a tab 'Retailer'. Below this, the main heading 'ENTITY LIST' is followed by a '+ New Entity' button. The interface is divided into two sections: 'PRIMARY ENTITIES' and 'DYNAMIC ENTITIES'. The 'PRIMARY ENTITIES' section shows a table with columns 'ACTION' and 'NAME', containing one entry: 'Customer'. The 'DYNAMIC ENTITIES' section shows a table with columns 'ID', 'ACTION', 'NAME', 'CODE', 'DESCRIPTION', and 'LAST MODIFIED', containing two entries: 'Retailer' and 'Lead'. Both sections include a pagination control 'Item / Page: 10' and navigation buttons for 'Prev', '1 / 1', and 'Next'.

The 'NEW ENTITY' form is a modal window with a close button (X) in the top right corner. It contains two required fields: 'Name \*' and 'Description \*'. The 'Name \*' field has a placeholder 'Enter name'. The 'Description \*' field has a placeholder 'Enter description'. At the bottom of the form, there are two buttons: 'Save' (with a floppy disk icon) and 'Cancel'.



## HOW TO FIND

1. Enter the URL into the system and log in
2. Click the Setting icon on the top right corner
3. Select Entities

## DESCRIPTION

### ENTITY LIST

There are 2 sections in Entity list: Primary entities and Dynamic entities  
 Primary objects are the objects that are available in the system such as Account.  
 Dynamic object is one that you created.

## HOW TO CREATE A NEW ENTITY

1. On Entity list, click **+ NEW ENTITY** button



## 2. Enter **Name** of the entity and **Description**

**Note:** there is no Validation for the Name field of the entity. However, it's better to use a unique Name for Name field to avoid misunderstanding.

### HOW TO CREATE CUSTOM FIELDS

1. On the Entity list, click on the name of an entity which you want to add custom fields. The entity will be opened in a new tab next to Entity list.
2. Click **+ New Field** button
3. Enter data into below fields:  
Name: This is the name of the field  
Data Type: can be text, number, checkbox, etc.  
Required: this new custom field will become a mandatory field if Required checkbox is checked Unique: data on this new custom field will be unique for a record if Unique checkbox is checked.
4. Click **Save**

### HOW TO DELETE A CUSTOM FIELD

**Note:** You cannot delete the system fields. Systems fields are ones that are created by the system. System fields are available on Primary entities.

1. On Entity list, click on the name of an entity to open the Entity summary
2. On the Field tab, click on the Delete button to delete the field you want.
3. Click **Save**

### HOW TO CONFIGURE LAYOUT

On Entity list, click on the name of an entity to open the Entity summary Open Layout tab

There is a field called "Layout". It's a dropdown list with 4 options:

**Index/List view:** choose which fields to display on the Entity list. This is what you should see when navigating to an Entity list.

**Search:** choose which fields that the entity can be searched by.

*Summary*

*view*

*Create/Update*

*view*

#### **Configure layout for Index/List view:**

Select Index/List view on Layouts dropdown list.

Click the Config layout button. Configuration popup will be opened.

Drag the fields you want to have on the Entity list from Configuration popup to the Layout form

Click **Save** on Configuration popup

*Configure layout for Search view:*

Select Search view on Layouts dropdown list.

Click the Config layout button. Configuration popup will be opened.

Drag the fields you want to have on the Entity list from Configuration popup to the Layout form Click **Save** on Configuration popup

*Configure layout for Summary view:*

Select Summary view on Layouts dropdown list.

Select Summary slot on Slot field and click  button

Drag the layout from Configuration popup and drop to the Summary page.

There are 5 layouts: 6:6; 4:4:4, 3:3:3:3, 9:3, 8:4

Ex: If you select 6:6 layout for a row, 2 widgets can be added.

If you select 4:4:4 layouts, 3 widgets can be added.

Drag the widget from Configuration popup and drop in the layout.

Click **Save** on Configuration popup.

*Configure layout for Create/Update view:*

Select Create/Update view on Layouts dropdown list.

Select Create, Update slot on Slot field and click  button

Drag the layout from Configuration popup and drop to the Summary page.

There are 5 layouts: 6:6; 4:4:4, 3:3:3:3, 9:3, 8:4

Ex: If you select 6:6 layout for a row, 2 widgets can be added.

If you select 4:4:4 layouts, 3 widgets can be added.

Drag the widget from Configuration popup and drop in the layout.

Click **Save** on Configuration popup.

## HOW TO EDIT AN ENTITY

On the Entity list, click on the name of the entity which you want to edit. The entity will be opened in a new tab next to Entity list.

Click Edit button

You can edit below information:

Name

Description

Activated (status): If the checkbox is ticked, the entity is ready to use and can be found in Entity menu

If the checkbox is not ticked, the entity is not ready to use and not viewable in Entities menu Add-On

## 2.11 Audit Logs

### MAIN FUNCTION

Audit logs feature allows you to track the activities in the system. These activities are viewed and searchable.

### SCREENSHOTS

| AUDIT LOGS                           |                  |                 |               |         |  | Select filter | Filter |
|--------------------------------------|------------------|-----------------|---------------|---------|--|---------------|--------|
| ID                                   | DATE TIME        | USER            | ENTITY        | EVENT   | DATA   |               |        |
| a0ba9f50-0da7-45d3-bcb9-d9a723aa9a5e | 24/11/2020 14:44 | Contemi Testing | LeadEntity    | Updated | J Helseth updated <a href="#">more</a>         |               |        |
| 1f0cf9d2-8f4d-4b15-8fde-fce8a0f0888d | 24/11/2020 14:06 | contemi_leone   | Probability   | Created | Won created                                    |               |        |
| 12bf35f9-c0cf-4b6e-a11c-a551fc1808f7 | 24/11/2020 14:06 | contemi_leone   | Probability   | Created | Lost created                                   |               |        |
| cb7c8d57-0b63-4a17-97fb-28591cb894c4 | 24/11/2020 14:06 | contemi_leone   | SalesCategory | Updated | Test updated <a href="#">more</a>              |               |        |
| 30b67d2a-350d-4df7-9cf7-3f5c135c147b | 24/11/2020 14:06 | contemi_leone   | SalesCategory | Created | Test created                                   |               |        |
| 2947757c-555c-44bc-999d-27dff09a8c66 | 24/11/2020 13:46 | contemi_henry   | Customer      | Updated | Test Test updated <a href="#">more</a>         |               |        |
| 7af6b847-869c-489d-8ac7-70cb87c57643 | 24/11/2020 13:45 | contemi_henry   | Customer      | Updated | Mila test company updated <a href="#">more</a> |               |        |
| 4e4a83b1-8ad0-437b-a098-6cc837f0cb7c | 24/11/2020 13:45 | contemi_henry   | Customer      | Updated | Test Man updated <a href="#">more</a>          |               |        |
| 48263316-866a-4920-b4d7-6aa10fc4f0b7 | 24/11/2020 12:30 | Contemi Testing | Customer      | Updated | Mila test company updated <a href="#">more</a> |               |        |
| 7028af59-0565-40d9-afb6-13cc90953076 | 24/11/2020 12:27 | contemi_henry   | Customer      | Updated | john Jones updated <a href="#">more</a>        |               |        |

Item / Page: 10

« Prev 1 / 72 Next »

## FILTER



Entity

Select entity



From

From



To

To



User

Select user



## CHANGED DATA : ASHLEY TOLL



| FIELD    | FROM              | TO                       |  |
|----------|-------------------|--------------------------|--|
| Address  | Högalidsgatan 30A | Abrahamsbergsvägen 64-72 |  |
| PostCode | 11730             | 16830                    |  |

### HOW TO USE AUDIT LOGS

1. Enter the URL into the system and log in
2. Click the Setting icon on the top right corner
3. Select Audit logs
4. Click the filter button to open the Filter panel on the right side.
5. You can filter the audit logs by
  - Entity
  - Date from
  - Date to
  - User

## 2.12 Scoring Management

### MAIN FUNCTION

Scoring model helps in scoring/categorizing customers in the CRM.

This is useful to understand how valuable a customer is so that they can differentiate a good customer from a bad customer. This can be then used for many purposes like giving good customers better discounts, better premium rates, and VIP customer service. And they can get statistics about bad customers to prevent selling high risk products to them or carefully checking their claims for fraud etc.

# SCREENSHOTS

## SCORE MODEL MANAGEMENT

To upload new model, drag or drop your model file here or [Upload file](#)

| ACTION | VERSION                        | UPLOADED BY                  | UPLOADED DATE    |
|--------|--------------------------------|------------------------------|------------------|
|        | Version 33                     | contemi-testing              | 23/04/2021 17:35 |
|        | Version 32 <span>Active</span> | contemi-testing              | 23/04/2021 17:07 |
|        | Version 31                     | contemi-testing              | 23/04/2021 16:42 |
|        | Version 30                     | felix_nguyen@contemi-testing | 16/04/2021 12:29 |
|        | Version 29                     | felix_nguyen@contemi-testing | 16/04/2021 12:27 |
|        | Version 28                     | felix_nguyen@contemi-testing | 15/04/2021 14:59 |
|        | Version 27                     | contemi-testing              | 13/04/2021 09:56 |
|        | Version 26                     | contemi-testing              | 09/04/2021 18:19 |
|        | Version 25                     | contemi-testing              | 01/04/2021 15:15 |
|        | Version 24                     | contemi-testing              | 01/04/2021 14:58 |

Item / Page: 10 Total 44 records

Prev 2/5 Next

## SCORE CALCULATION

Version 32 >

Postcode:  Enter Postcode    Credit Score:  Enter Credit score    Educational Level:  Select Educational level

Company Registration Date:  Select Company registration date

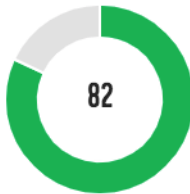
Breakdown

## SCORE BREAKDOWN

|                       | INPUTS               | OUTPUT               |
|-----------------------|----------------------|----------------------|
| Credit Rate           | <input type="text"/> | <input type="text"/> |
| Established Year      | <input type="text"/> | <input type="text"/> |
| Educational Level     | <input type="text"/> | <input type="text"/> |
| Geographical Area     | <input type="text"/> | <input type="text"/> |
| Postcode - Population | <input type="text"/> | <input type="text"/> |

- SUMMARY
- QUOTES
- POLICIES
- DOCUMENTS
- HISTORY

## CUSTOMER SCORE



Credit Score



Customer Score

| SCORE BREAKDOWN       |                          | Version 32      |
|-----------------------|--------------------------|-----------------|
|                       | INPUTS                   | OUTPUTS         |
| Credit Rate           | 82                       | 0.9             |
| Established Year      | 2011-02-07T00:00:00+0000 | 0.95            |
| Educational Level     | 1                        | 0.9             |
| Geographical Area     | 18916                    | 1.05            |
| Postcode - Population | 4344                     | 18916           |
| <b>Final Score</b>    |                          | <b>0.807975</b> |

### HOW TO UPLOAD A SCORING FILE

Scoring file should be defined with format so that the system can read it. However, the user can modify the value in the scoring file and upload it.

1. Go to Setting menu -> Scoring management
2. Drag a file into the Upload box and click Submit button



3. The uploaded file is shown on the top of the scoring list.


### HOW TO TEST A SCORING MODEL



When a scoring file is uploaded to the system, the user can test to make sure that it is correct before officially using it.

1. Go to Setting menu -> Scoring management
2. On the Scoring calculation tab, select the Version that you want to test. When a version is chosen, the fields which are defined in that version are fetched into the Score calculation tab.
3. Fill data which is used to test and click Apply.
4. Click **Calculate** button.

### HOW TO ACTIVE A SCORING MODEL

The user needs to activate a scoring model so that it's ready for use. Only one scoring model is activated at a time.

1. Go to Setting menu -> Scoring management
2. On Action column, click  on the version that you want to activate it



**Version 32** Active
contemi-testing
23/04/2021 17:07

## HOW TO READ CUSTOMER SCORE

The customer score is calculated when the customer is created or edited (with enough information to calculate the score)

The user can view customer score in Customer Summary page - Customer score widget

### CUSTOMER SCORE



Or Scoring tab to see the breakdown of the scoring factors

SUMMARY FRAME AGREEMENTS APPLICATIONS GUARANTEES DOCUMENTS HISTORY CASES NOTES SMS CONTACTS ENTITIES SCORING

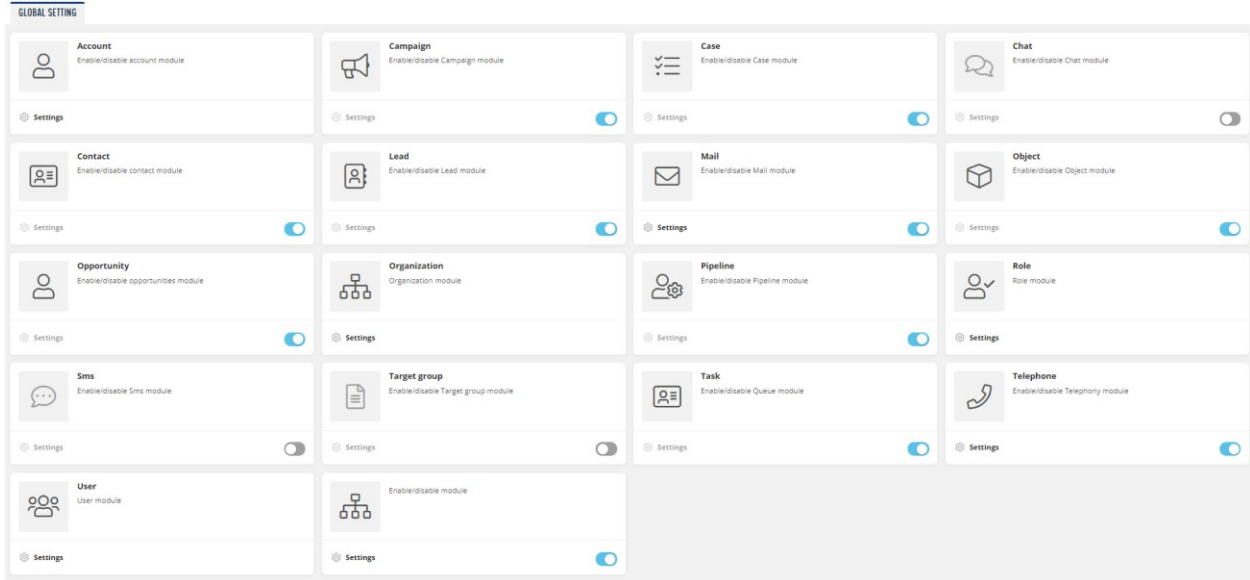
| SCORE BREAKDOWN       |                          | Version 1 |               |
|-----------------------|--------------------------|-----------|---------------|
|                       | INPUTS                   |           | OUTPUTS       |
| Credit Rate           | 45                       |           | 1.25          |
| Established Year      | 1994-11-09T00:00:00+0000 |           | 0.9           |
| Educational Level     | 1                        |           | 0.9           |
| Geographical Area     | 693494                   |           | 1             |
| Postcode - Population | 0456                     |           | 693494        |
| <b>Final Score</b>    |                          |           | <b>1.0125</b> |

## 2.3 Module configuration

### MAIN FUNCTION

This module allows the administrator to turn on/off the modules that they want/do not want to use and do configuration for each module.

### SCREENSHOTS



### Account Module

This module cannot be turned off.

Currently the global settings for this module consist of:



## SETTINGS



### SETTINGS

Choose account country

x Norway x

Enable/disable account modulus 11



Enable/disable account org no trigger



Enter account phone prefix

+47 x

Enter account reference begin

4000

Enable/disable account ssn trigger





Enable/disable account scoring trigger



Choose account type

x Company x Person x

- **Choose account country:** this defines the default value at Country field in Create Account form.
- **Enable/disable account modulus 11:** once enabled, it validates the input at NIN field and throws a validation message if the input doesn't meet Modulus-11 rule.
- **Enable/disable account org no trigger:** once enabled, user can see a magnifying-glass  button in "NIN" field. Clicking on the button triggers a search (e.g. from Bisnode) and fill out company-info fields.
- **Enter account phone prefix:** here defines the default country code at Phone fields.
- **Enter account reference begin:** the input is the start number of Account Reference.
- **Enable/disable account ssn trigger:** once enabled, user can see a magnifying-glass  button in "NIN" field. Clicking on the button triggers a search (e.g. from Bisnode) and fill out personal-info fields.
- **Enable/disable account scoring trigger:** once enabled, when creating new or editing existing account, it calls the Scoring service to calculate customer score.
- **Choose account type:** two possible options, "Person" and "Company".
  - If both are selected in settings, when creating new account, user needs to choose either "Person" or "Company" in order to navigate to the respective form.
  - If either of them is selected in settings, e.g. Person, clicking on Create account button would directly open the Create Person Account form.

For example:

- Choose Account Country is "Norway" and Account Phone Prefix is "+47"

Choose account country

x Norway x

Enter account phone prefix

+47 x

In the Create Account form, the default "Country" is "Norway" and default "Country code" at Phone is "+47":

## CREATE NEW ACCOUNT

Organization \*

contemi-testing x

### BASIC INFORMATION

NIN

Enter NIN

First Name \*

Enter First name

Last Name \*

Enter Last name

DOB

Select DOB

Gender

Select Gender

Address

Enter Address

Postcode

Enter Postcode

City

Enter City

Country

Norway x

Email Address

Enter Email Address

Phone Number

+47 x

Preferred Communication

Select Preferred Communication

Status

Select Status

- Account Org. no. trigger: enabled

Enable/disable account org no trigger



Users can trigger an auto-fill-up to company-info fields:

## ACCOUNT FORM



Organization \*

contemi-testing



### BASIC INFORMATION

Org. No

912660680



Company Name \*

NÆRINGS- OG FISKERIDEPARTEMENTET

Email Address

postmottak@nfd.dep.no



Company Phone

Enter Company phone

Status

Select Status



Country

Norway

### ADDRESS

Visiting Address

Kongens gate 8

Extra Address

Enter Extra Address

Postcode

0153

City

OSLO

Postal Address

Enter Postal address

Extra Address

Enter Extra Address

Postcode

Enter Postcode

City

Enter City

Invoice Address

Enter Invoice address

Extra Address

Enter Extra Address

Postcode

Enter Postcode

City

Enter City

### OTHER INFORMATION

Credit Score

Not Rated

Credit Rating

E

Industry Code

84.110

Industry

General public administratio...

Educational Level

Select Educational level



Company Registration Date

31/10/2013



KAM

Select KAM



Preferred Collection Date

Select Preferred Collection D...



Payment Type

Select Payment Type



Payment Frequency

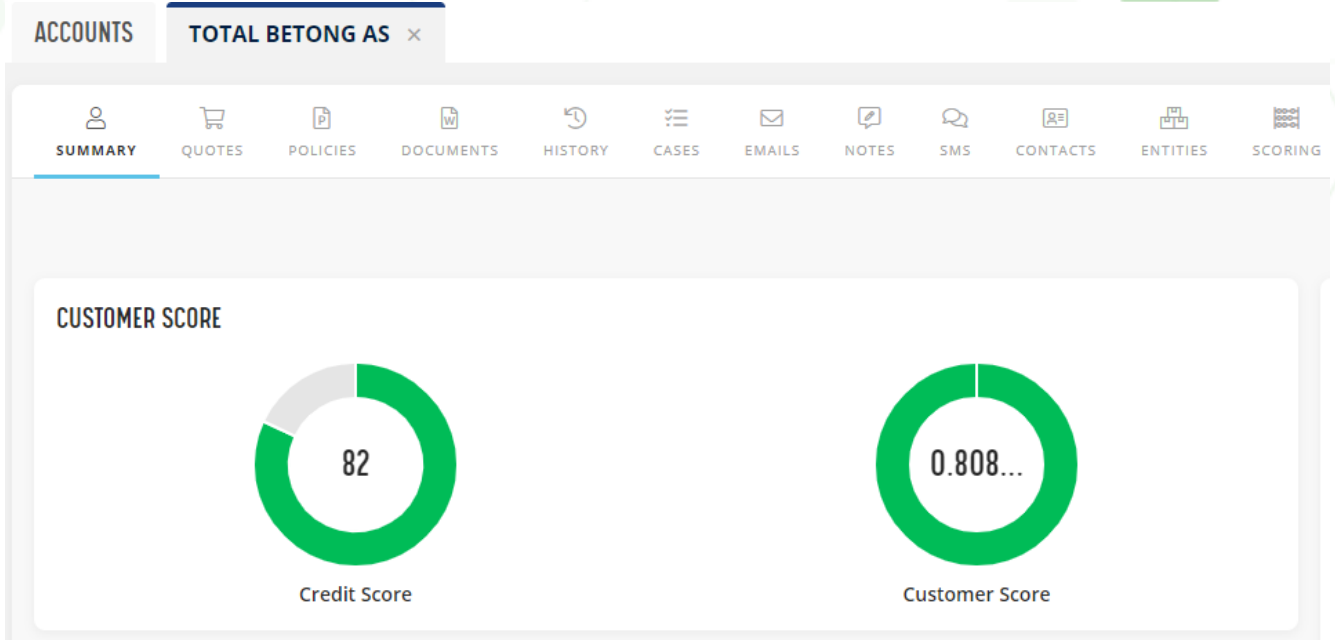
Select Payment Frequency



- If Customer Score enabled, users can see the scores at Customer Summary page:

Enable/disable account scoring trigger





- If Modulus-11 validator is turned on:

The screenshot shows a form with a toggle switch for 'Enable/disable account modulus 11' which is turned on. Below it, the 'BASIC INFORMATION' section contains three input fields: 'NIN' with the value '0101881234' and a red error message 'NIN/Org. No is not correct', 'First Name \*' with the value 'Gillian', and 'Last Name \*' with the value 'Test'.

- If Account Type has both options:

The screenshot shows a form with a dropdown menu for 'Choose account type' which is open, displaying two selected options: 'Company' and 'Person'.

Users need to select either of them before navigating to Create Account form:

The screenshot shows the 'ACCOUNT LIST' form with a '+ Create' button and an 'Import account' button. A dropdown menu is open over the 'Create' button, showing 'Person' and 'Company' options. A blue arrow points from the 'Create' button to the dropdown menu.



# Faster, Flexible and Fit for You