

## Safetriponline user guide

This user guide is a small introduction to the [www.safetriponline.com](http://www.safetriponline.com) website, that guides you through its features, policy issuing process and reporting

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**01/11/2018**

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## Agent settings

- Edit Profile
- Change Password

At first log in, it is recommended that you update



- 1- Your user profile and include your email address on which you will receive the password recovery link in case you forgot your password.

### AGENT'S PROFILE

Broker No	Catgory	Local Currency
0	INDIVIDUAL	USD
First Name*	Middle Name	Last Name*
Green	Green	Greens
Email Address	Contact Person	Contact Date
sss@ssd.com	aaaaaaa	29/07/1981
Country*	City*	
Greece	Athen	
Street*	Building	PO Box
marcory	orfan abed	1918
Telephone*	Fax Number	Business Act
07078970147788888	21267624114422	TRAVEL Agency
<b>SUBMIT</b>		

- 2- Change your password

◀ RESET PASSWORD

Old Password

New Password

Confirm Password

SUBMIT

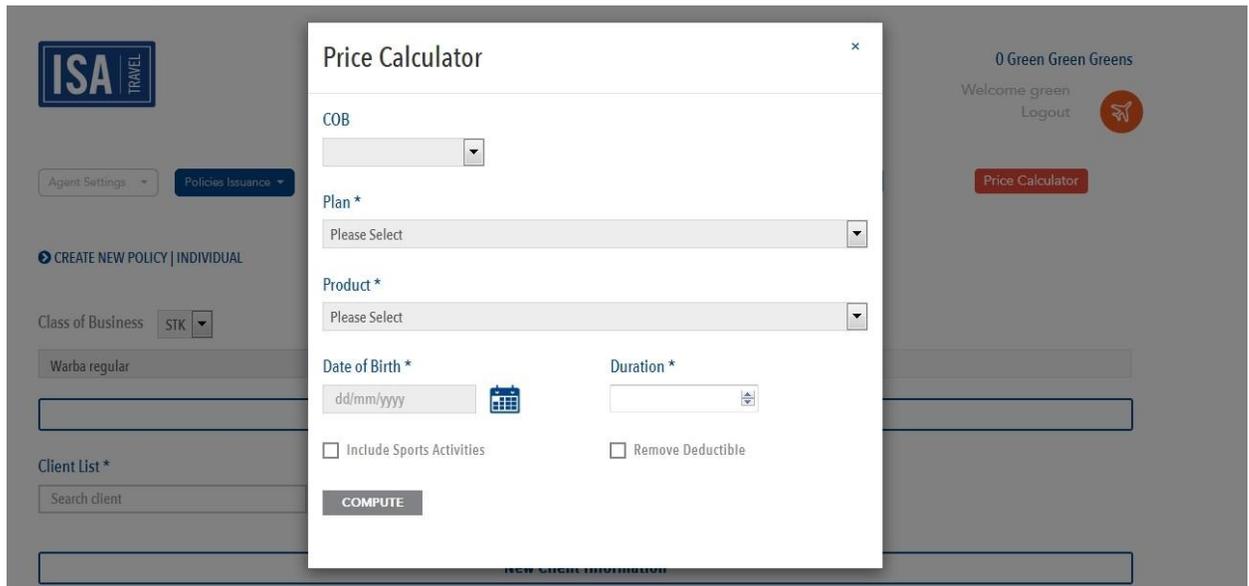
## Price Calculator

To check the price without having to issue a policy, just follow these simple steps:

- 1- Click on the price calculator (red button at the top right)



- 2- Fill in the required data

A screenshot of the 'Price Calculator' modal form. The form is titled 'Price Calculator' and has a close button (X) in the top right corner. It contains the following fields and options:

- COB: A dropdown menu.
- Plan \*: A dropdown menu with 'Please Select' as the current selection.
- Product \*: A dropdown menu with 'Please Select' as the current selection.
- Date of Birth \*: A text input field with a calendar icon and a placeholder 'dd/mm/yyyy'.
- Duration \*: A dropdown menu.
- Include Sports Activities: An unchecked checkbox.
- Remove Deductible: An unchecked checkbox.
- A 'COMPUTE' button at the bottom.

The background shows a blurred view of the dashboard with the 'Price Calculator' button highlighted.

- 3- Click on compute, and the premium will appear.

## Policy issuing

### New Client

- 1- Start by filling the client information especially those with an asterisk \*

**New Client Information**

First Name *	Middle Name	Last Name *
<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of Birth *	Age	Passport No.
<input type="text" value="dd/mm/yyyy"/>	<input type="text"/>	<input type="text"/>
		Gender *
		<input checked="" type="radio"/> M <input type="radio"/> F
		Country of Residence *
		<input type="text" value="Please Select"/>
Email	Tel*	
<input type="text"/>	<input type="text"/>	
<input type="button" value="Add To Policy"/> <input type="button" value="Clear"/> <input type="button" value="Import From Excel"/>		

- 2- After completing all the details of the client click on “Add to policy”
- 3- Once you click on add to policy, all the client details will be shown in a table as per the following:

Email	Tel*
<input type="text"/>	<input type="text"/>
<input type="button" value="Add To Policy"/> <input type="button" value="Clear"/> <input type="button" value="Import From Excel"/>	

Main Client	Client Number	First Name	Middle Name	Last Name	Gen	Age	Country of Residence	Telephone	Date of Birth	Passport No		
<input checked="" type="radio"/>	687405	GEORGES	ELIAS	SOU DIR	M	40	Lebanon	.	10/05/1978	LR0943183	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>

No of clients 1

- 4- Double check all info are correct and continue to trip details below the table

<input type="checkbox"/> Company Name	<input type="text"/>					
Plan *	Product *					
<input type="text" value="Please Select"/>	<input type="text" value="Please Select"/>					
Destination	Inception *	Expiry	No. of Days *			
<input type="text" value="Please Select"/>	<input type="text" value="dd/mm/yyyy"/>	<input type="text" value="dd/mm/yyyy"/>	<input type="text" value="0"/>			
<input type="checkbox"/> Include Sports Activities	Tariff	Additional Fees	Issuing Fees	Child Discount	Stamps	Ins.Fee
<input type="checkbox"/> Remove Deductible	USD <input type="text"/>	0	0	<input type="text"/>	0	0
<input type="checkbox"/> Top-Up Benefits	Total	<input type="text" value="USD"/>				
<input type="button" value="COMPUTE"/> <input type="button" value="SUBMIT"/> <input type="button" value="NEW"/> <input type="button" value="PRINT ON SA"/> <input type="button" value="PRINT"/> <input type="button" value="SEND MAIL"/>						

5- Select the plan, and zone of coverage (product), destination is not mandatory

Inception \*

dd/mm/yyyy



6- Set the inception date , you can put the expiry date

Expiry

dd/mm/yyyy



No. of Days \*

0

or you can put the number of travel days

Include Sports Activities

Remove Deductible

7- Put a check mark to choose

To cover additional benefits, such as:

- a. Sports activities: to extend coverage to include non-hazardous and dangerous sports (additional 50% on premium)
- b. Remove deductible: to remove the deductible applicable on each covered claim (additional 15% on premium)

8- After completing all data, click on compute, then submit to save the policy

9- Should you need to print the policy on a blank paper with the logo header and footer, you click on "Print", in case you are printing on a pre-printed paper (A4 with existing header and footer) click on "Print on SA" or you can email the policy.

10- If you need to load the premium (max 100\$) you can put the premium difference in the

Additional Fees

0

"additional fees"

eg. Policy premium =10\$ and you want to sell it 15\$, you put

5\$ in the "additional fees"

	Tariff	Additional Fees	Issuing Fees	Child Discount	Stamps	Ins.Fee
USD		0	0		0	0

Total  USD

COMPUTE

SUBMIT

NEW

PRINT ON SA

PRINT

SEND MAIL

## Existing Client

Should you have a regular client and you want to issue a new policy for him, you can find all his details in the client list

- 1- In the client list, write his name till you get the required name

Client List \*

GEORGES ELIAS SOUDIR
----------------------

**New Client**

- 2- Select the name and click on “Add client from list”
- 3- The name will be shown in the table
- 4- Proceed as per point 4 above.
- 5- Should you need to update any of the client info (before policy printing/email), click on “edit” next to the client info in the table, the data will be displayed in the “new client information”

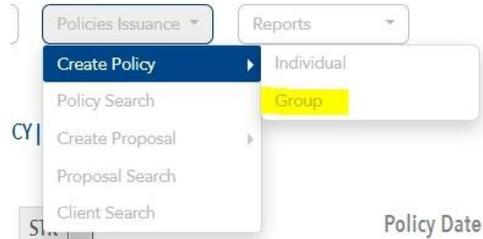
**New Client Information**

First Name *	Middle Name	Last Name *
<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of Birth * dd/mm/yyyy	Age <input type="text"/>	Passport No. <input type="text"/>
	Gender * <input checked="" type="radio"/> M <input type="radio"/> F	Country of Residence * Please Select
Email <input type="text"/>	Tel* <input type="text"/>	
<input type="button" value="Add To Policy"/> <input type="button" value="Clear"/> <input type="button" value="Import From Excal"/>		

Adjust the needed info and click on save client.

## Import from Excel - for Groups

- 1- After you fill the required data on the file, save it to your desktop
- 2- Go to policy issuance



- 3- Create policy -> group
- 4- Under the new client's information, click on Import from Excel

**New Client Information**

First Name *	Middle Name	Last Name *
<input type="text"/>	<input type="text"/>	<input type="text"/>
Date of Birth * dd/mm/yyyy	Age	Passport No.
<input type="text"/>	<input type="text"/>	<input type="text"/>
	Gender *	Country of Residence *
	<input checked="" type="radio"/> M <input type="radio"/> F	Please Select
Email	Tel*	
<input type="text"/>	<input type="text"/>	

- 5- Browse for the saved file and put the sheet name and click on import

File Name:  No file selected. Sheet Name:

- 6- Select the main client from the list of names or put the company name
- 7- Continue with the policy normally

## Client info amendment

In case you have mistakenly mistyped any of the below client info and already printed/emailed the policy:

- 1- Name (contact your administrator to adjust the name)
  - 2- DOB
  - 3- Gender
  - 4- Passport number
  - 5- Country of residence
  - 6- Telephone
  - 7- Email
- } Follow the below steps

### Follow these steps to amend client info

- 1- Policy issuance → client search



- 2- Search for the name of the client (just first two letters from the name/last name are enough) or by his number (client number can be found in the policy pic.1)

The screenshot shows the 'CLIENT SEARCH' form. At the top, there are three dropdown menus: 'Agent Settings', 'Policies Issuance', and 'Reports'. To the right are two buttons: 'View Policies' (blue) and 'Price Calculator' (red). Below the dropdowns is a section titled 'CLIENT SEARCH' with a right-pointing arrow. There are four input fields: 'Client Number', 'Client First Name', 'Client Middle Name', and 'Client Last Name'. At the bottom, there are two buttons: 'SEARCH CLIENT' and 'ADD NEW CLIENT'.

- 3- Click on edit client near the relative name

The screenshot shows the 'DISPLAY CLIENTS' table. It has a header row with columns: 'Insured Code', 'First Name', 'Middle Name', 'Last Name', 'Birth Date', and 'Edit Client'. There are three data rows. The second row is highlighted in grey.

Insured Code	First Name	Middle Name	Last Name	Birth Date	Edit Client
701344	MARITA		ABOU ABDO	22/06/2013	Edit Client
701346	MIKAELLA		ABOU ABDO	31/08/2016	Edit Client
713659	MAGUY		AOUN	11/01/1969	Edit Client

- 4- Adjust the required info
- 5- Submit
- 6- Reprint the policy

**Pic1. Client number on the policy**

**New Client Information**

First Name \*  Middle Name  Last Name \*

Date of Birth \*   Age  Passport No.  Gender \*  M  F Country of Residence \*

Email  Tel\*

Main Client	Client Number	First Name	Middle Name	Last Name	Gen	Age	Country of Residence	Telephone	Date of Birth	Passport No		
<input checked="" type="radio"/>	717090	THERESE		AAD	F	58	Lebanon	.	01/01/1960		<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
<input type="radio"/>	717091	IBTISAM		AAD	F	60	Lebanon	.	01/01/1958		<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
<input type="radio"/>	717092	MAHA		ABBOUD	F	56	Lebanon	.	10/12/1962		<input type="button" value="Edit"/>	<input type="button" value="Remove"/>

## Searching for a policy

Should you need to search for a certain policy; you can check using 2 methods:

- View policies
- Policy search

### Using the 1<sup>st</sup> method "View Policies"



When you click on view policies button, you will be transferred to the home page where you can view:

- 1- Pending policies : all issued policies with inception date > today's date
- 2- Active policies : all issued policies with inception date =< today's date, and expiry date > today's date
- 3- Pending Proposals : all issued proposals (price offer only and not a valid policy) with inception date > today's date



**N.B. Should you have issued a proposal and you want to make it effective, in the pending proposal, click on "Make Policy" at the end of the proposal**

PENDING PROPOSALS

Proposal Number	Created on	Plan	Beneficiary name	Inception	Expiry	Duration	No. of Clients	Total Premium	Approve
TCH-513352-000	12/10/2018	Charter - Visa Plus <sub>7</sub> Europe (excluding Swiss & UK) / Arab	SSH 25 OCT 18	25/10/2018	31/10/2018	7	46	414.00	Make Policy

### Using the 2<sup>nd</sup> method "Policy search"

- 1- Go to policy issuance
- 2- Policy search



3- Search by any of the available criteria and click on search policies.

● POLICY SEARCH

Policy Number

Client Number

Client First Name

Client Middle Name

Client Last Name

SEARCH POLICIES

## Reports

### - Agent Report

Should you need to view all the issued policies under your own user, you need to follow these steps:

- 1- Go to Reports
- 2- Agent report



- 3- Select the required criteria

**AGENT REPORTS**

CHOOSE A TYPE

All  Proposals  Policies  Cancellations  E-mailed

POLICY/ PROPOSAL NUMBER

CLIENT LAST NAME

ISSUING DATE

From   To  

**GENERATE** **EMAIL POLICY(S)**

- 4- Choose the date interval (the shorter the date interval is the quickest the report will show)
- 5- Click on generate to get the requested report.

- **Subagent report**

In order to generate the production report for every subagent you have, just follow these steps:

- 1- Go to Reports
- 2- Subagent report



- 3- Select the required criteria
- 4- You can either choose to view all your subagents production or each agent production apart by selecting the “agent name”

➤ SUB-AGENT REPORT

POLICY TYPE

- All  Policies  Proposals  Cancellations

POLICY/ PROPOSAL NUMBER

AGENT NAME

ISSUING DATE

From



To



SEARCH

DETAILED SEARCH

CLEAR

Show Amount in USD

- 5- Choose the date interval (the shorter the date interval is the quickest the report will show)
- 6- Click on search to generate the report or detailed search in case you need to view additional info of the policy such as name Split, Passport number...