Safetriponline user guide

This user guide is a small introduction to the www.safetriponline.com website, that guides you through its features, policy issuing process and reporting

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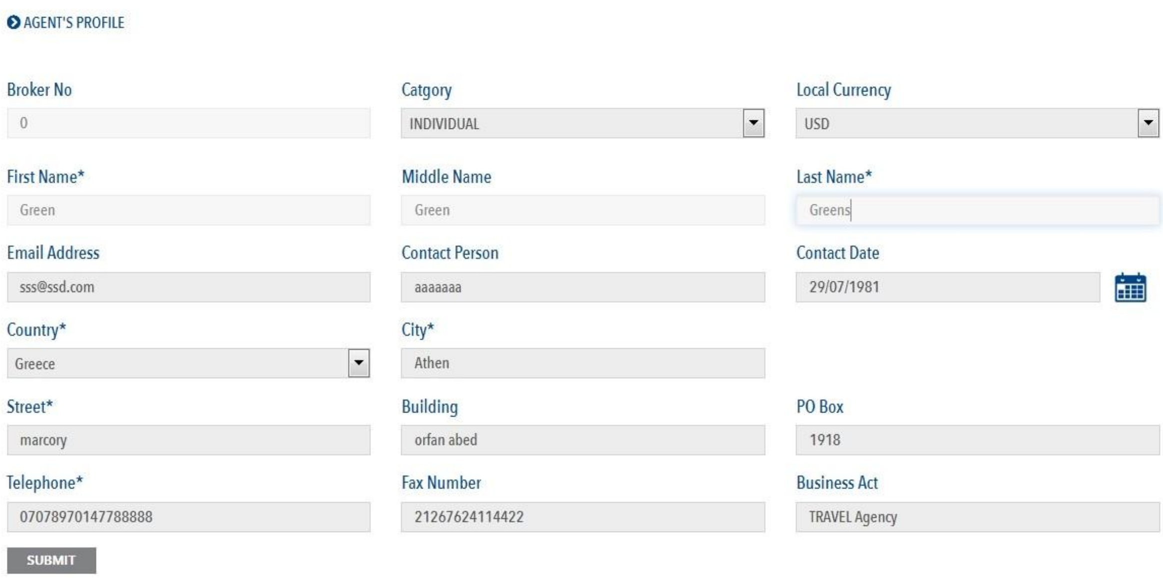
Contents

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.



2- Change your password

RESET PASSWORD

Old Password

New Password

Confirm Password

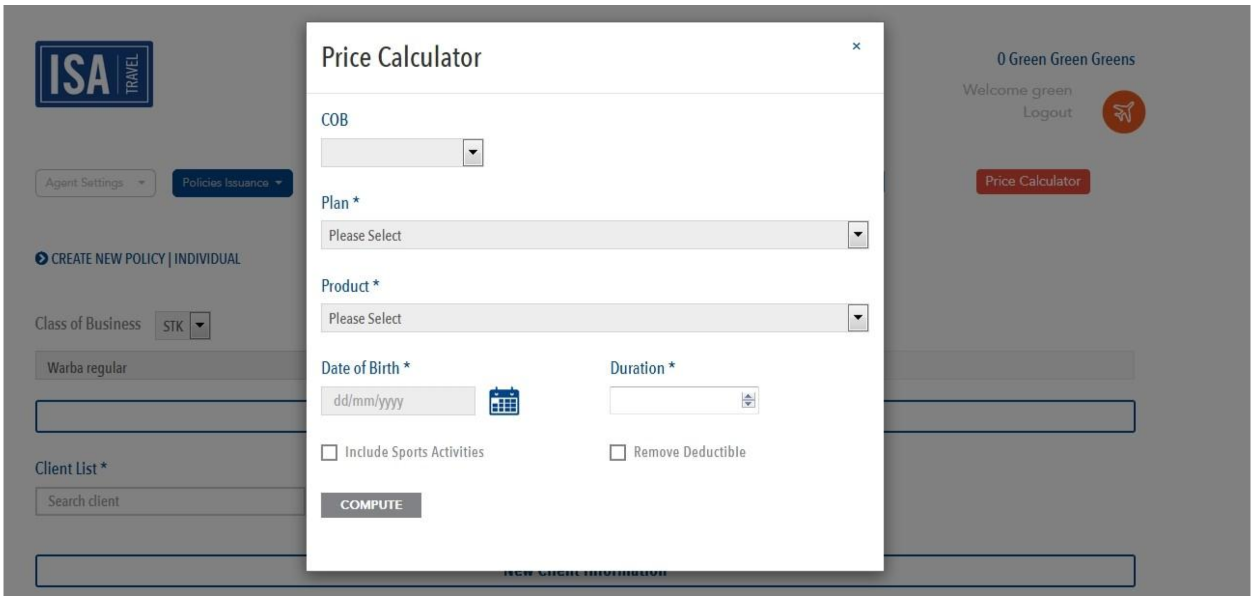
SUBMIT

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



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

Policy issuing

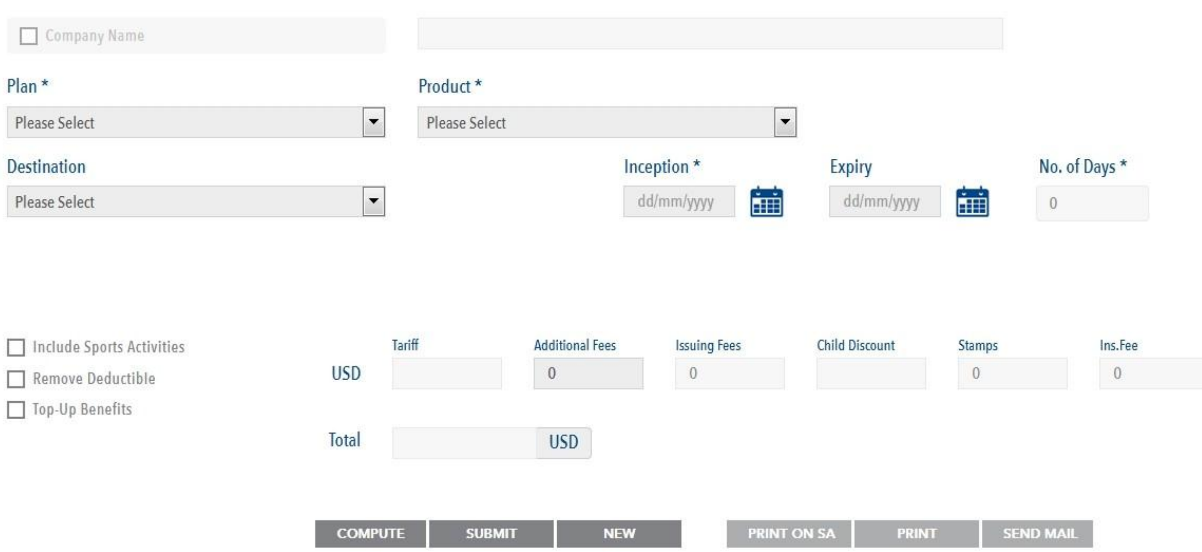
New Client

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

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:

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



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

6- Set the inception date 

, you can put the expiry date

or you can put the number of travel days 

7- Put a check mark to choose 

To cover additional benefits, such as:

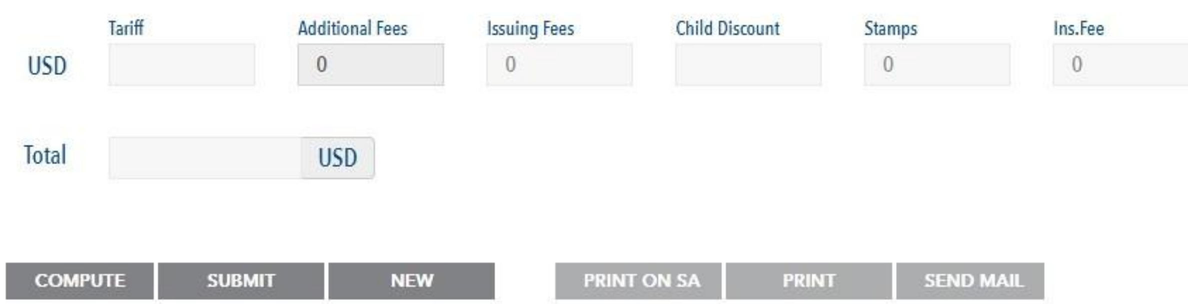
a. Sports activities: to extend coverage to include non-hazardous and dangerous sports (additional 50% on premium)
b. Remove deductible: to remove the deductible applicable on each covered claim (additional 15% on premium)

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" 

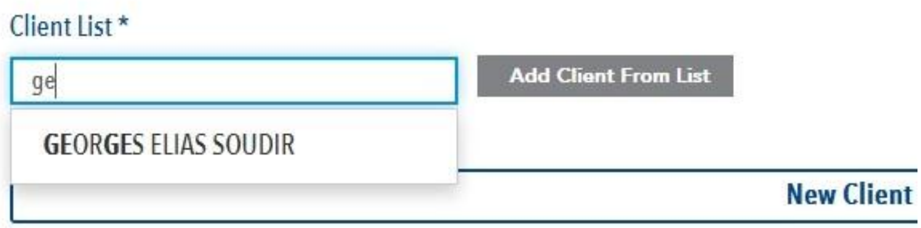
eg. Policy premium =10$ and you want to sell it 15$, you put 5$ in the "additional fees"



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

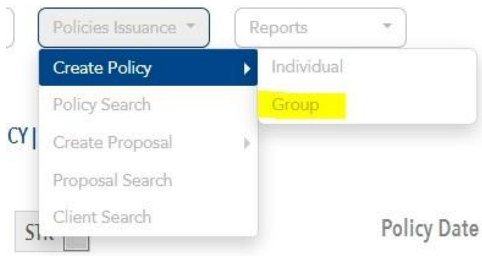


2- Select the name and click on "Add client from list"
3- The name will be shown in the table
4- Proceed as per point 4 above.
5- Should you need to update any of the client info (before policy printing/email), click on "edit" next to the client info in the table, the data will be displayed in the "new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

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

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

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

Client info amendment

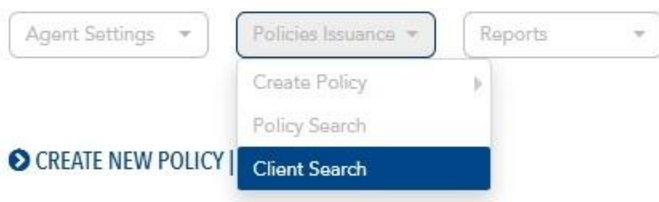
In case you have mistakenly mistyped any of the below client info and already printed/emailed the policy:

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

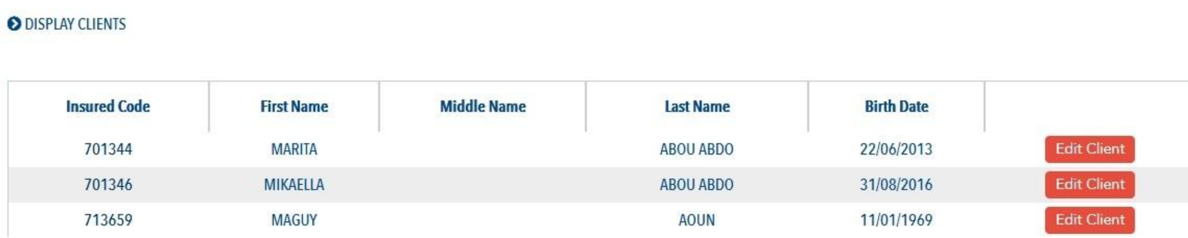
Follow these steps to amend client info

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)

3- Click on edit client near the relative name

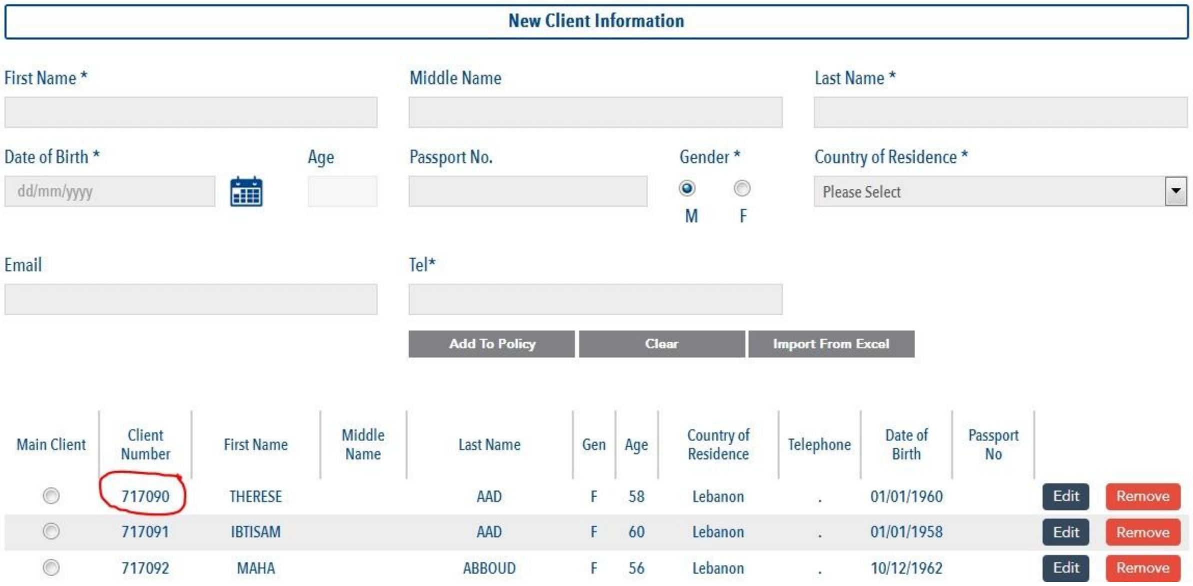


DISPLAY CLIENTS

Insured Code	First Name	Middle Name	Last Name	Birth Date	
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



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 1st 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

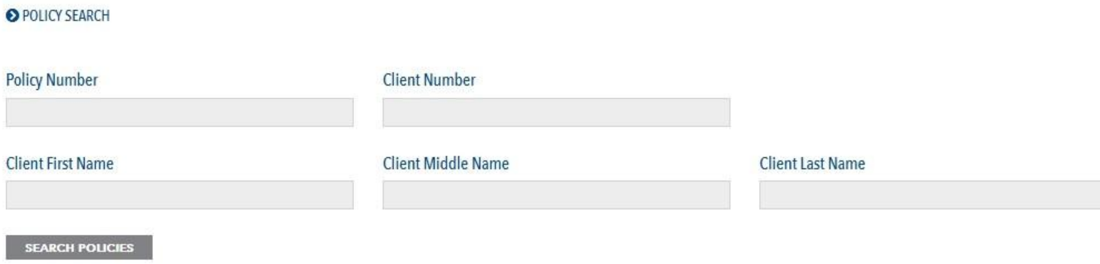
N.B. Should you have issued a proposal and you want to make it effective, in the pending proposal, click on "Make Policy" at the end of the proposal

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,-,Europe (excluding Swiss & UK) / Arab	SSH 25 OCT 18	25/10/2018	31/10/2018	7	46	414.00	Make Policy

Using the 2nd method "Policy search"

1- Go to policy issuance
2- Policy search

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

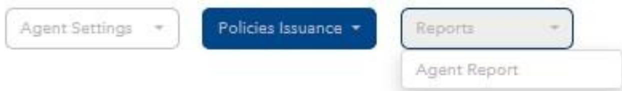


Reports

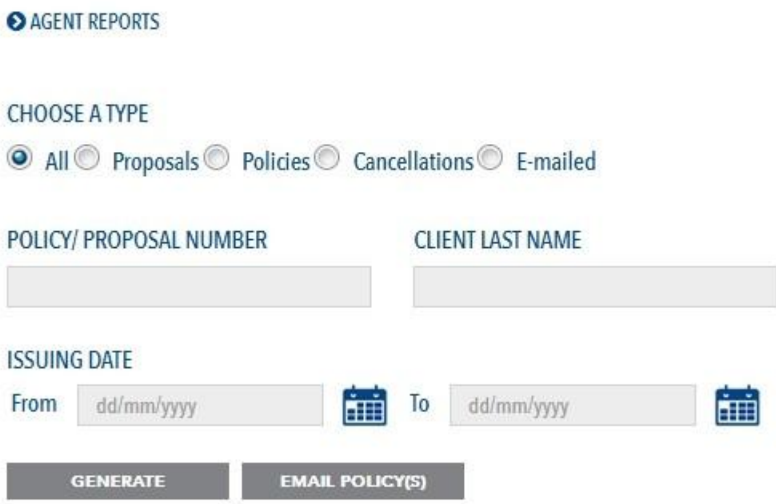
- **Agent Report**

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



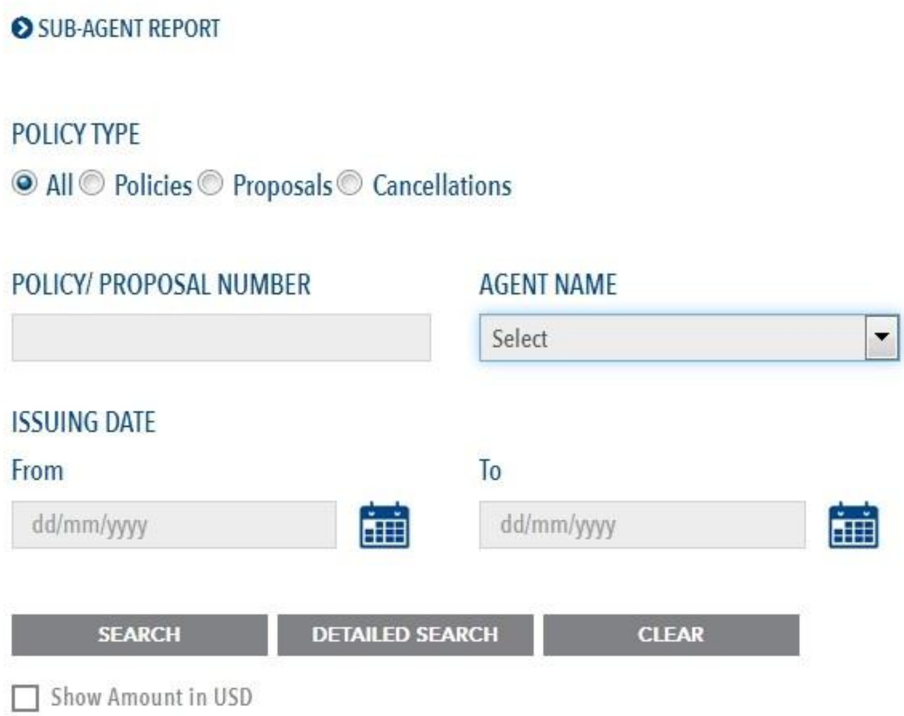
4- Choose the date interval (the shorter the date interval is the quickest the report will show)
5- Click on generate to get the requested report.

- **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"



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…