Teessen Consulting

2023

TC Desktop Application - Administrator Guide

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Teessen Consulting

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Contents

Introductions

The purpose of this document is to provide a high-level overview of the full administrative functionalities.

Automation, System configurations and drop-down menus are managed and populated by the System Administrator.

This functionality is controlled by user permissions and will therefore not be visible to a non-administrative user.

Security and Login

Teessen Consulting Support team will register and create the users on your company's database according to the roles, relevant permissions and securities as determined by the business during initial setup.

Teessen Consulting uses an online form process for User license requests and the user login details will be provided via email.

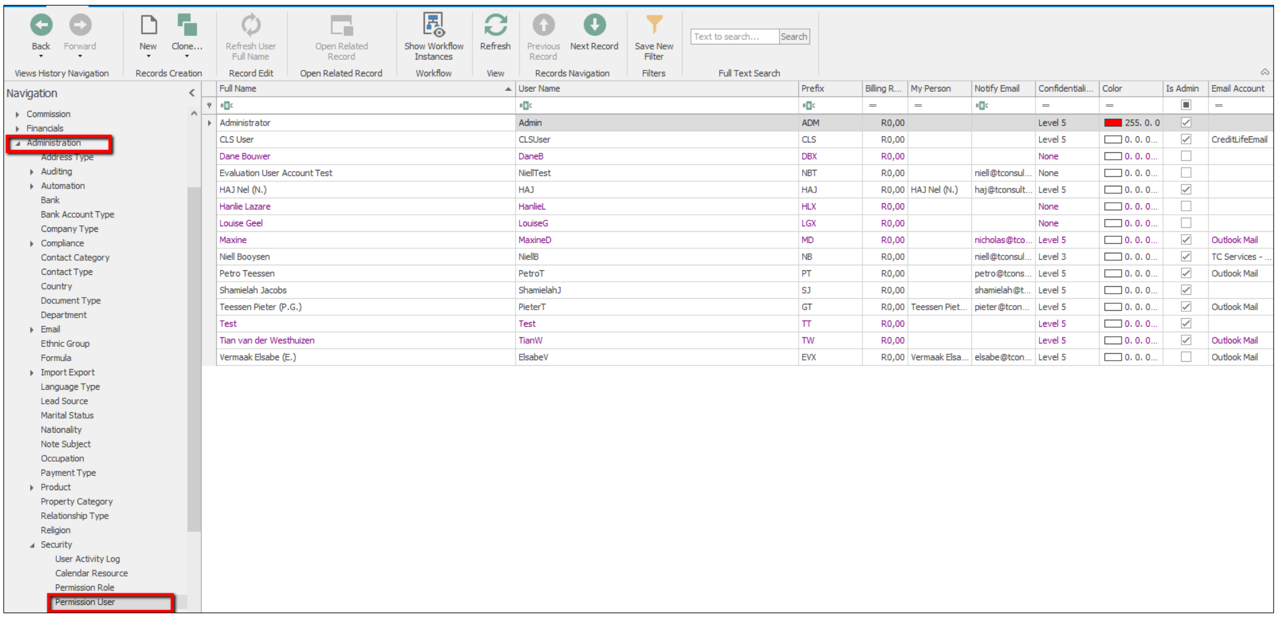
License Renewal

Should the application prompt you to renew your product license, then please email the relevant information to support@tconsult.co.za

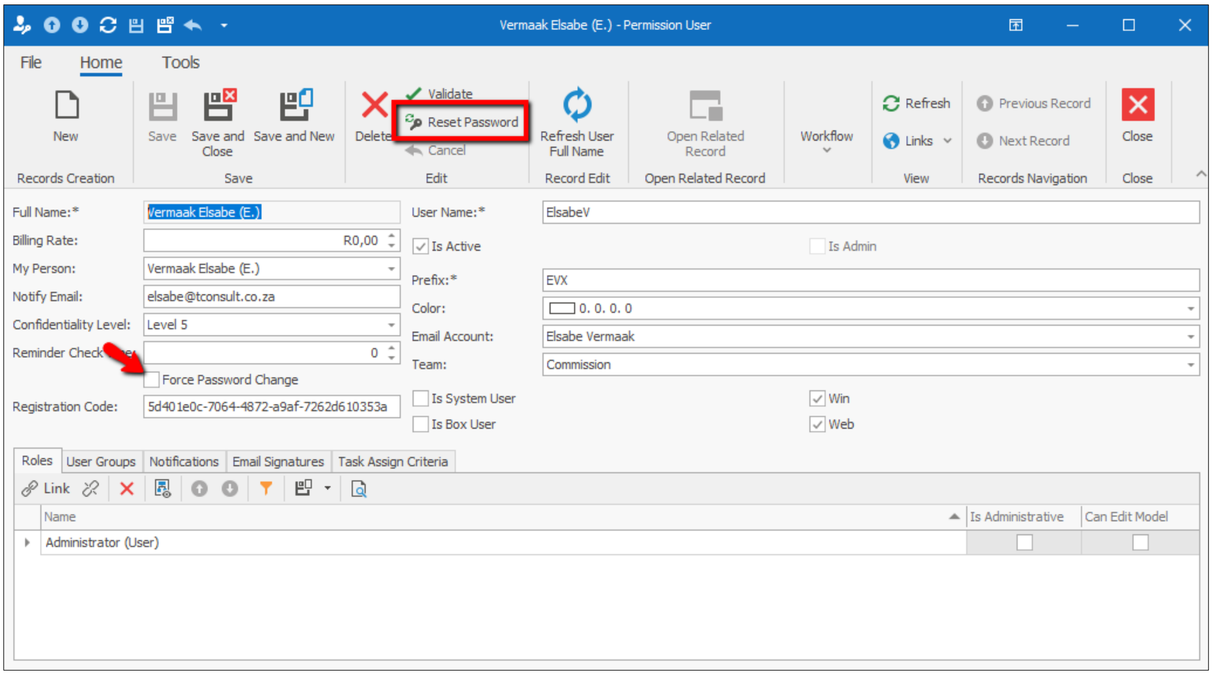
Reset User Passwords

As System Administrator you have access to reset or change user passwords.

Navigate to Permission User on the Navigation Pane



Select the user and choose Reset Password



The application will auto generate a password and select the 'Force Password Change'. The user will be prompted to create a new password on first login.

Users on the application are allocated to a collection of groups and are performing one or more roles within the application.

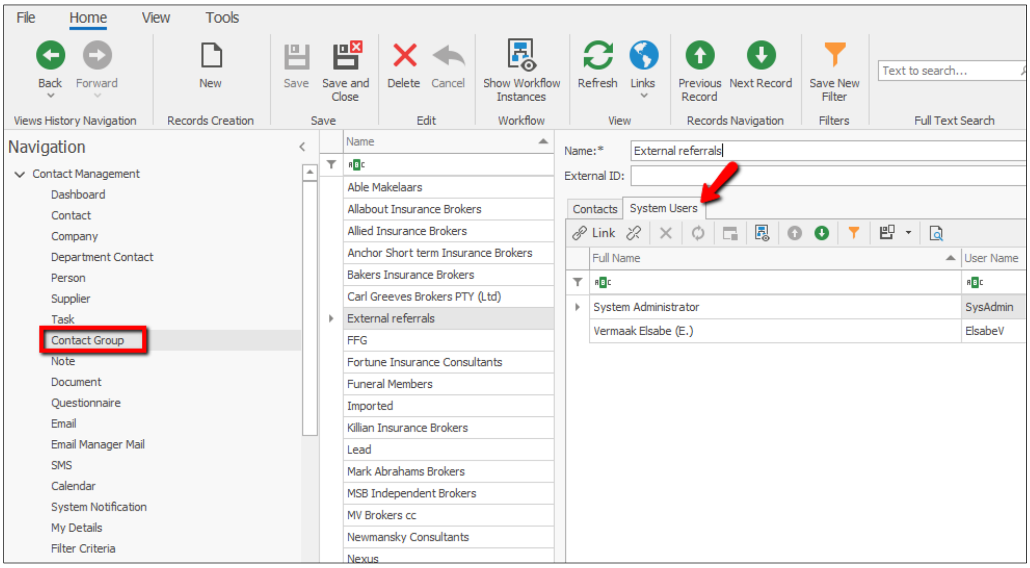
User Roles

Users can perform multiple roles within a company and the application will combine the various rights available within these roles into a single security profile for the user.

User Permission Roles are set up and managed by Teessen Consulting and cannot be changed by neither user nor System Administrator.

User Groups

- A user can be linked to multiple groups, giving the user access to the company- and person records within those groups.
- Groups provide a segmentation mechanism with user-controlled access.
- User Groups is a direct link to Contact Group. Please remember to link users when a new Contact Group has been created.



Confidentiality level

- This could be anything from 'None' to 'Level 5' and provide a further method of restrictions within the application.
- Confidentiality can be applied to documents, notes and tasks within the application.

A user with 'Level 3' access will only be able to access information with a confidentiality setting of 'Level 3' and lower.

Email Account

Email Account should be linked to the user record to enable the user to send emails from the application. Please refer to 'Email' within the 'Administration' section of this guide.

Teams

Users are grouped into Teams and will be restricted to only use Task types, Task log types, Reports and Automated processes which have been allocated to that specific Team.

A user has limited access to his/her own user profile to perform updates, e.g., Notification email, Reminder check time, Email Account and to change their own password.

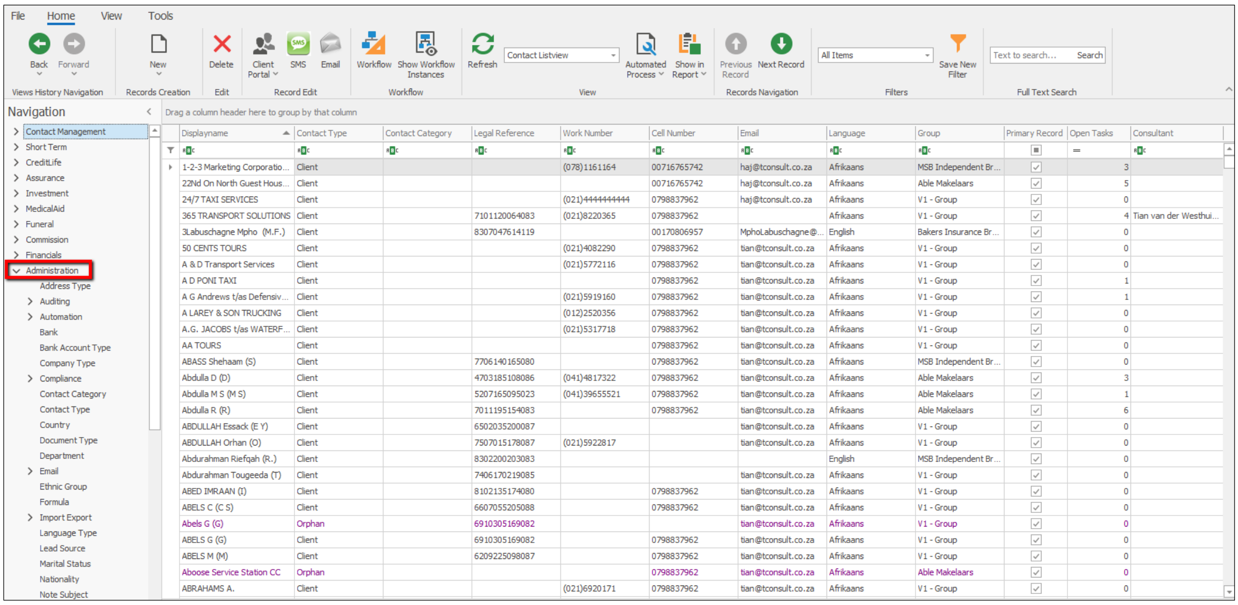
Administration

All drop-down menus in the application are managed by the System Administrator by using the Administration tools.

The completeness of these fields highly determines the accuracy and uniformity of your data.

Some functionalities like Distribution lists, automation, compliance, importers, etc. will improve proficiency and allow timeous communication with less effort.

State machine and workflows enable you to dictate and automate process flows.



Drop-down menus

Set up drop-down menus for each of the below data fields, according to your Company's requirements:

- Address Type
- Bank
- Bank Account Type
- Company Type
- Contact Category
- Contact Type
  - Select Product Provider if this type is used to identify Product Providers. These records will be grouped in the Supplier list view.
- Country
- Department
- Document Category
- Document Type
- Ethnic Group
- Formula
- Language Type
- Lead Source
- Marital Status

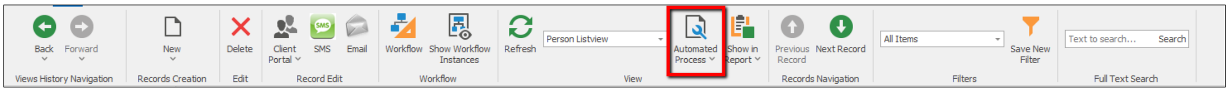
- Nationality
- Note Subject
- Occupation
- Payment Type
- Qualification
- Relationship Type
- Religion
- Task Type
- Task Log Type
- Text Template
- Title

Automation

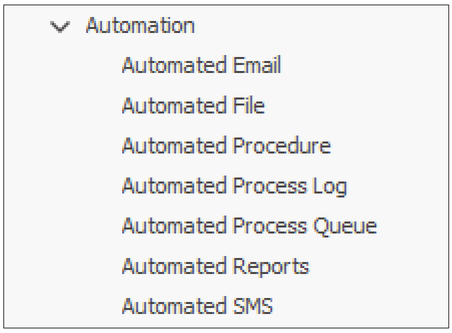
Automated Reports, -Email, -SMS or -Files can be set up to improve proficiency, uniformity and timeous communication with less effort.

These automated processes can be launched manually or via a workflow process.

You will notice the Automated Process icon on the Action bar of a List view if automation was set up for that specific view of data and linked to the specific user Team.



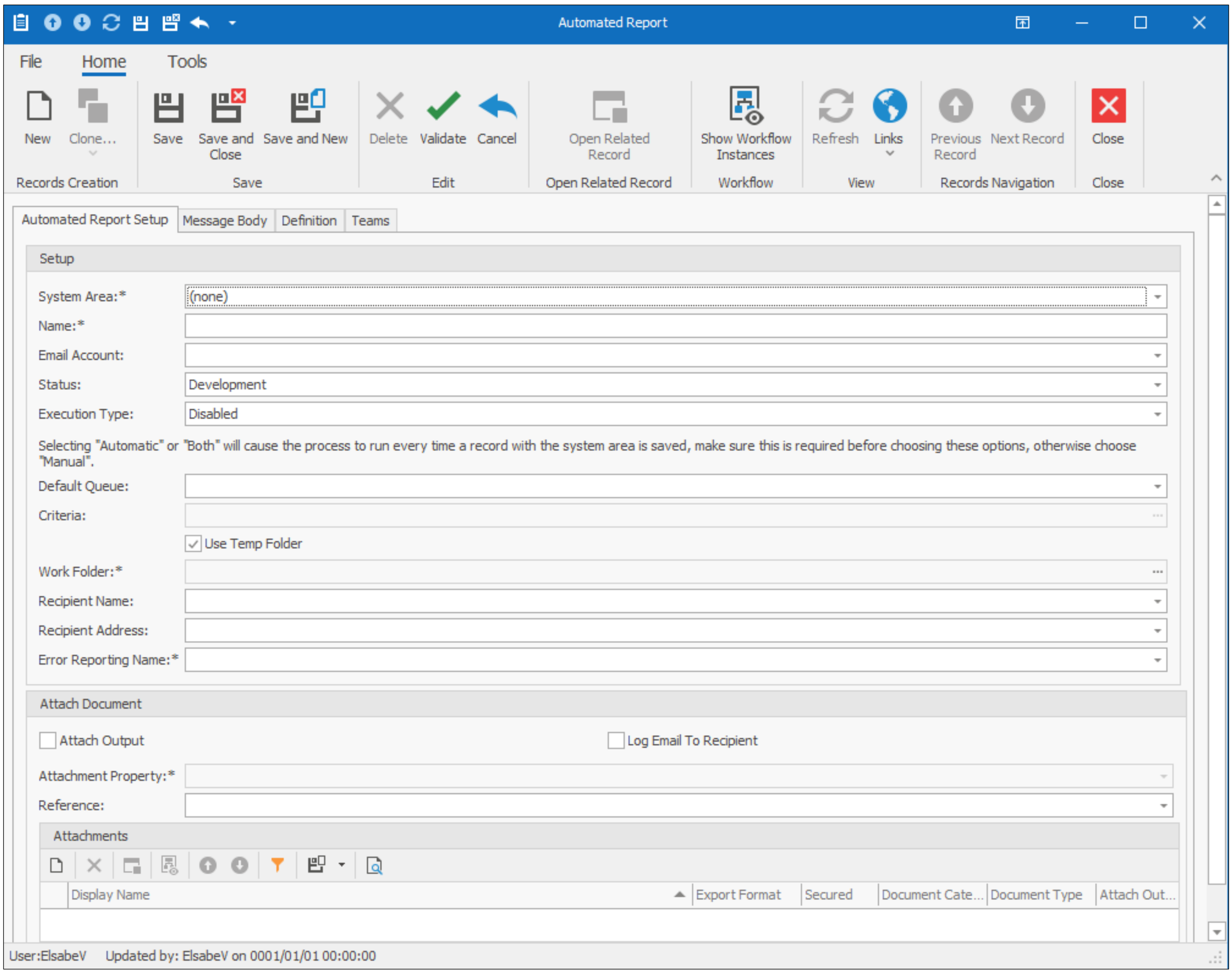
On the Navigation Pane, expand the Automation menu item to view all options:



Automated Report

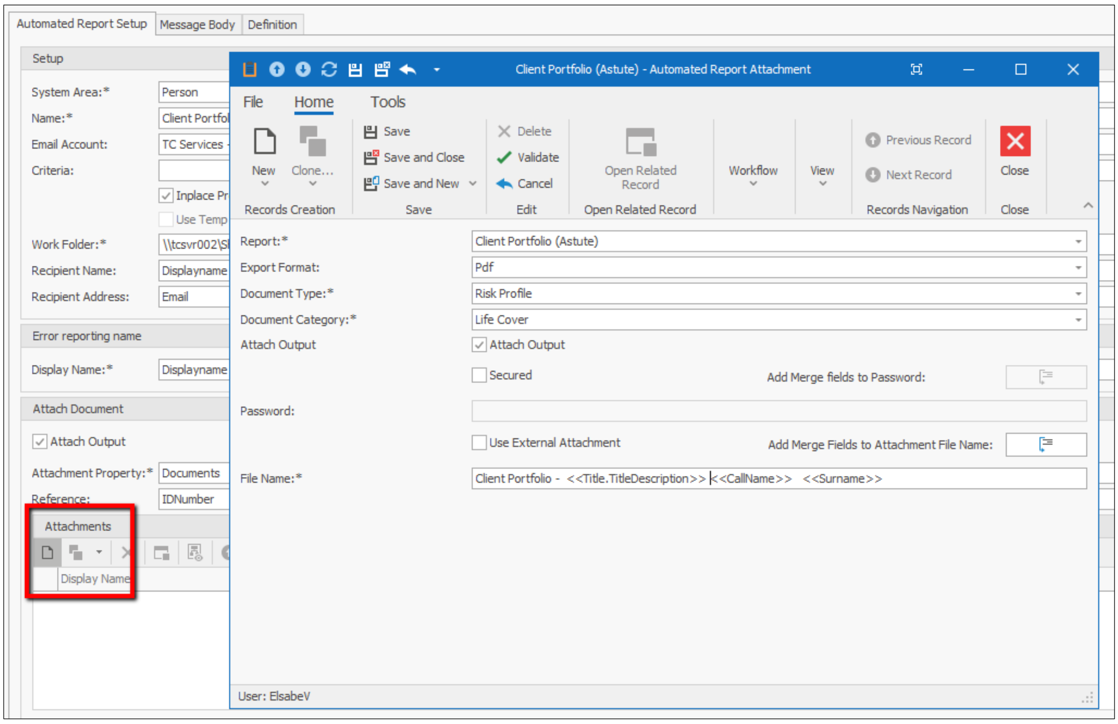
Set up a standardised email body with linked reports.

Automated Report Setup



Fieldname	Description	Required
System Area	Select the system area on which this process should be applicable	✓
Name	Provide a unique name for the automated report process	✓
Email Account	Specify email account to be used for this process.	
Status	Status will default to Development and only be an active field for users once in Production	✓
Execution Type	Selecting “Automatic” or “Both” will cause the process to run every time a record with the system area is saved, make sure this is required before choosing these options, otherwise choose “Manual”	
Default Queue	Select default queue for this process	
Criteria	Apply specific filter criteria to this process if applicable	
Use Temp Folder	You may select to save the attachments of this process in a temp folder instead of saving it in your documents folder.	
Work Folder	If not selected to Use Temp Folder, then select location where a copy of the attachments needs to be saved.	✓
Recipient Name	Select the required field from the drop-down menu.	✓
Recipient Address	Select the email address of the recipient.	✓
Display Name	Typically, the same as Recipient Name	
Attach Output	Select if these documents should be saved to the client record	
Log Email to Recipient	Select if email should be saved on the client record	
Attachment Property	Select from drop down menu. Typical Document Category	
Reference	Specify document type.	

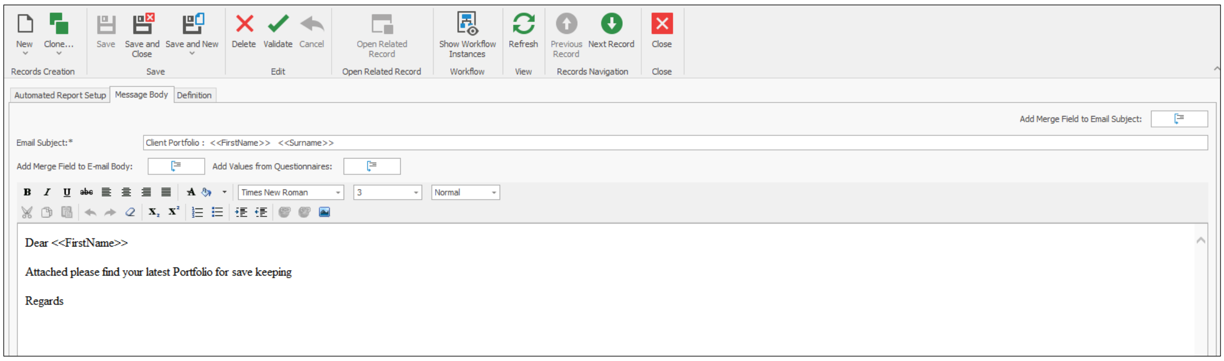
Attachments



Fieldname	Description	Required
Report	Select report from drop down menu	✓
Export format	Select the required format for the attachment from the drop-down menu.	✓
Document Type	Select document type from drop down menu	✓
Document Category	Select document category from drop down menu	✓
Attach output	Select if report must be saved on client record	
Secured	Select to use password security.	
Password	Optionally enter a password for protection.	
Use External Attachment	Select to use external attachment instead of system report	
File Name	Enter the file name. You may also select to use merge fields in the file name, e.g., Statement number	✓

Message Body

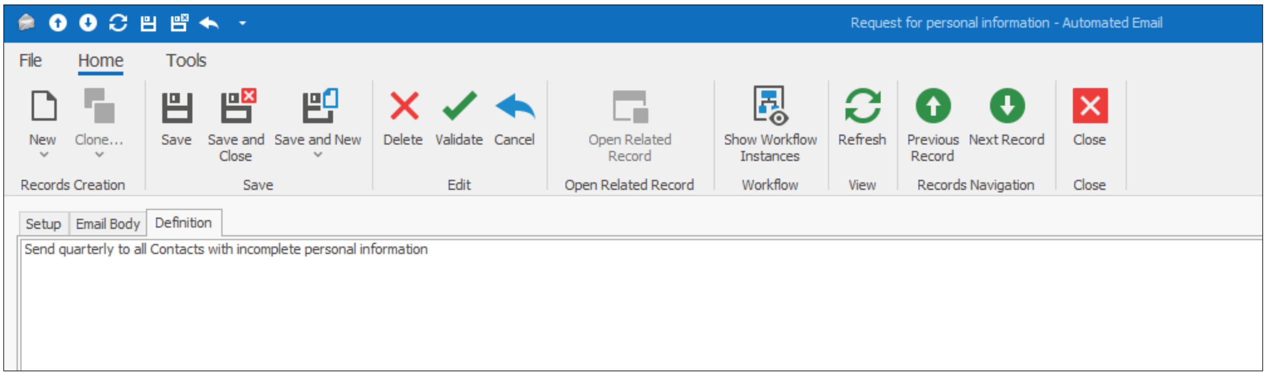
Create the email body. Use merge fields to personalize the message to each Recipient:



Note that the drop-down selection options on the merge fields depend on the system area you have selected for this process.

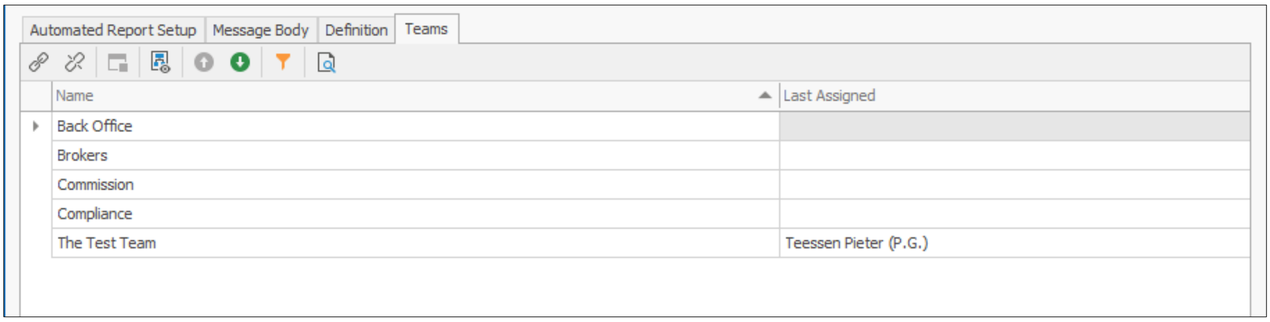
Definition

Use the Definition tab to describe the purpose and/or layout of this process:



Teams

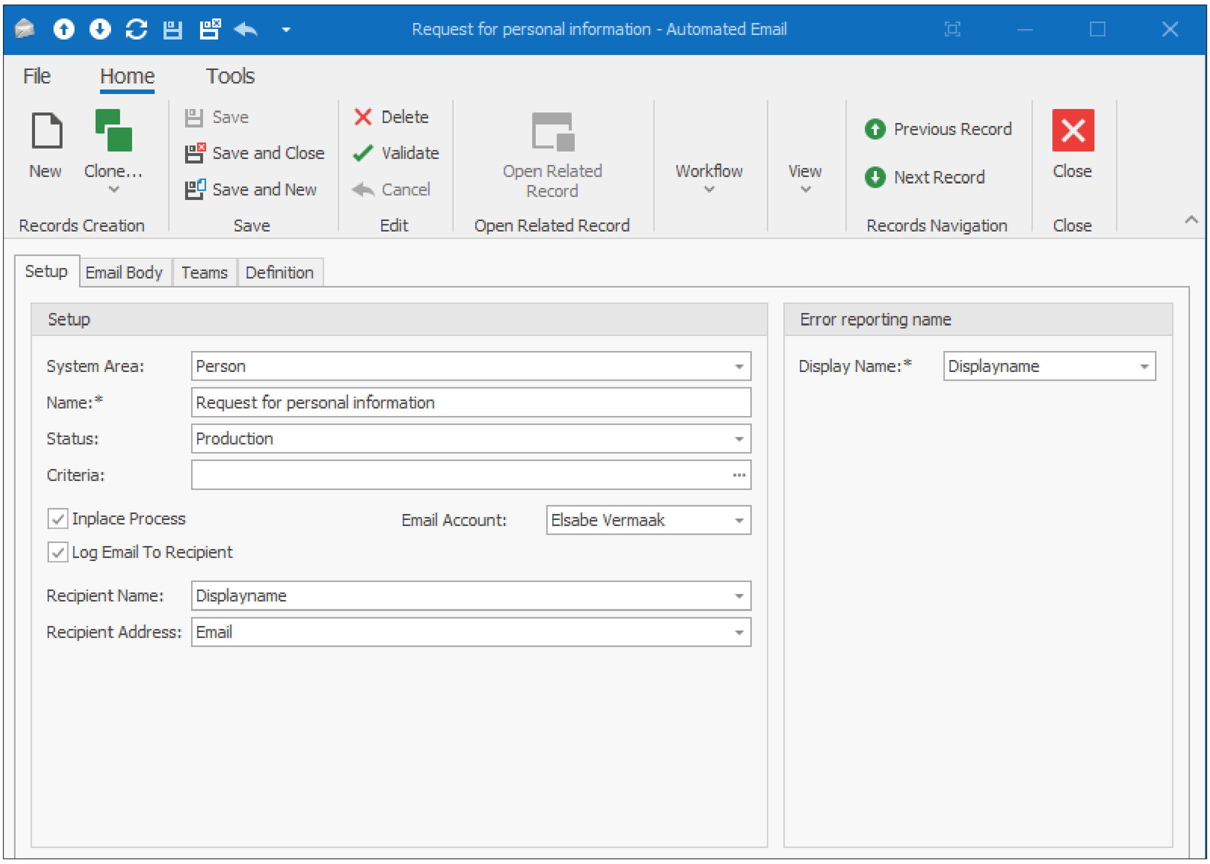
Link the process to the applicable Team(s). Please keep in mind that the process will not be available to users if they are not linked to the Team.



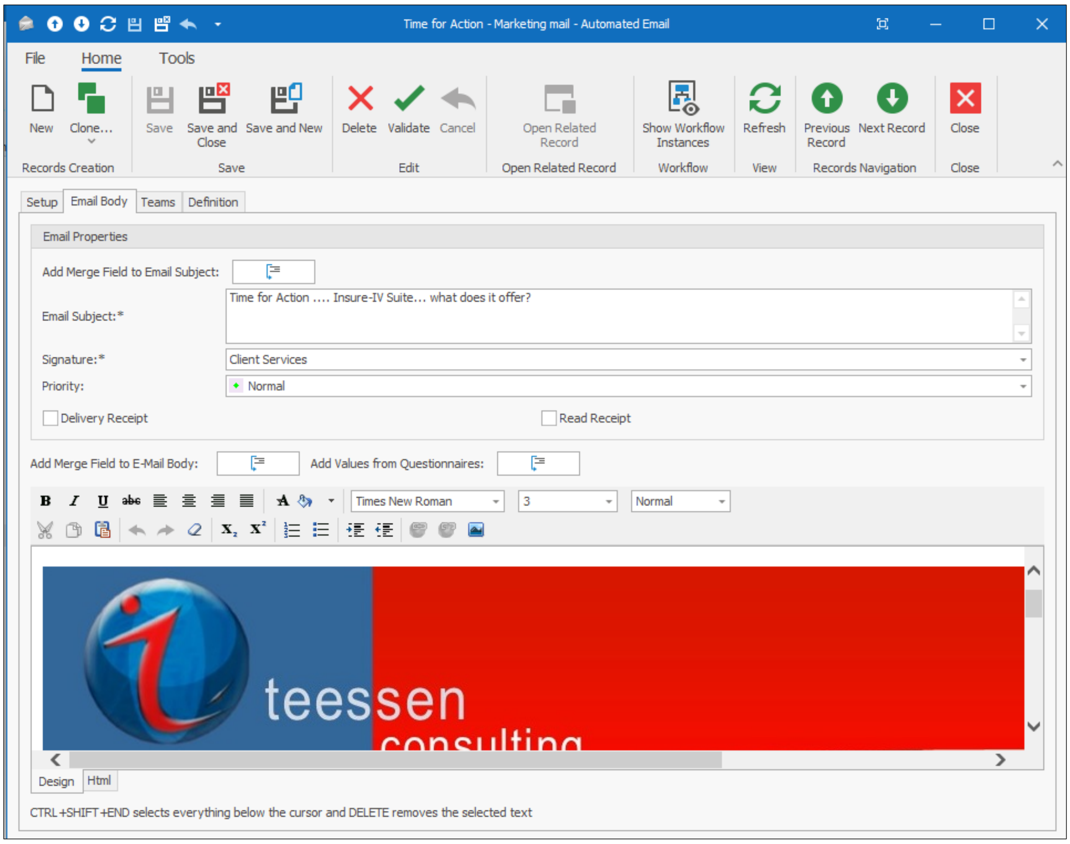
Automated email

Automated emails can be used to automate and standardise regular emails where no document attachment is required.

This feature can also be used to distribute marketing- or other information where an image can be inserted onto the email body with or without a normal text message.

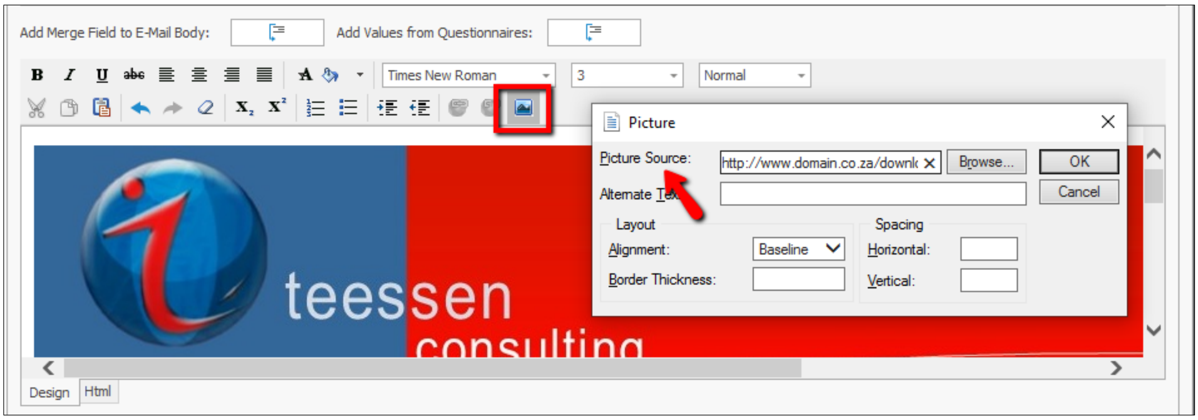


Fieldname	Description	Required
System Area	Select relevant system area. Criteria for Recipient Name and merged fields in email body are dependent on selected system area.	✓
Name	Descriptive name for email.	✓
Status	Status will default to Development and only be an active field for users once in Production	
Criteria	Enter specific filter criteria applicable to this process	
In-place Process	Always select this to make the automated process available on relevant views based on the selected system area.	✓
Email account	Select the email account to be used for this email	✓
Log email to Recipient	The Sent email will be saved within each contact to which it was emailed.	
Recipient Name	Select the required field from the drop-down menu.	✓
Recipient Address	Select the email address of the recipient.	✓
Display Name	Same as Recipient name.	✓



Please make sure that images used in an email body are saved within a public folder i.e., http://www.domain.co.za/downloads/resources/Image.jpg.

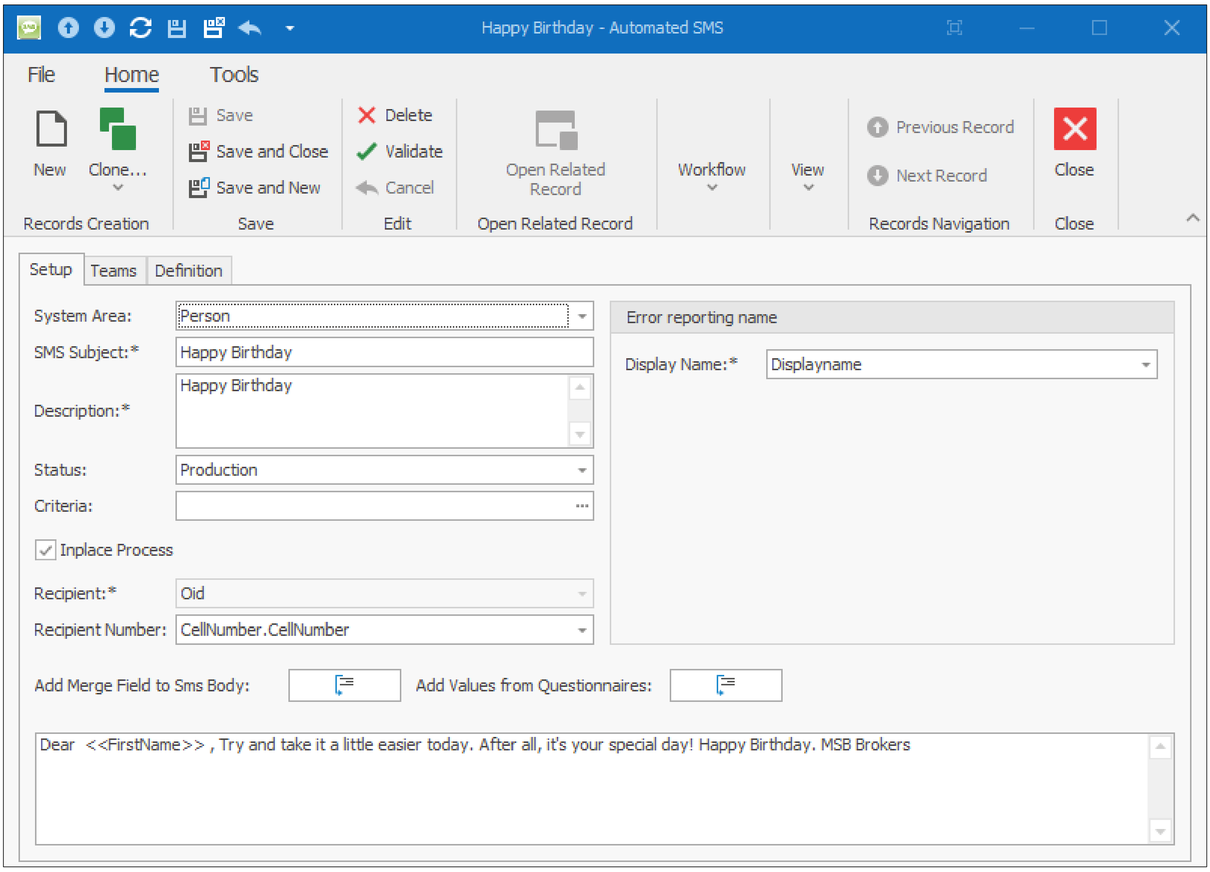
Do not copy and paste image onto email body



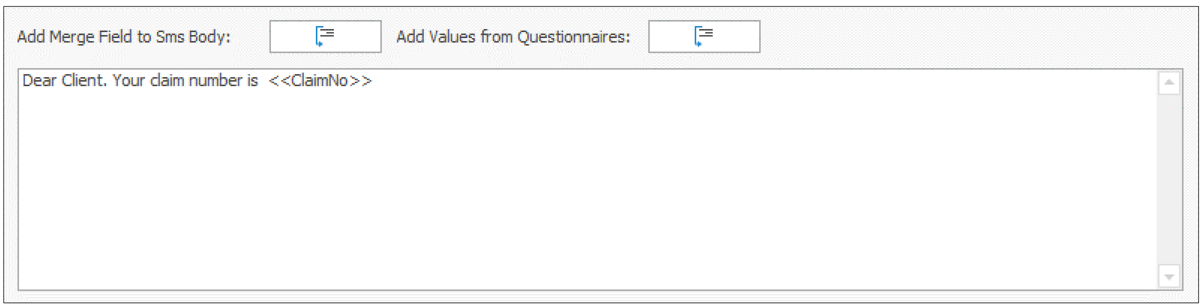
Refer to Automated Report section for details on Email body, Teams and Definition

Automated SMS

Sending standardized bulk SMS with pre-populated script:



Fieldname	Description	Required
System Area	Select criteria needed to set up merged fields.	✓
SMS Subject	Provide a relevant name. This name will display on the drop-down menu of the automated process.	✓
Description	Describe the purpose of the SMS.	✓
Status	Status will default to Development and only be an active field for users once in Production	
Criteria	Apply specific criteria to this process	
In-place Process	Always select this to make the automated process available on relevant views based on the selected system area.	✓
Recipient	Recipient will either be a Person, Contact or Owner depending on the application used.	✓
Recipient number	Select cell number.	✓
Display Name	Same as Recipient name.	✓



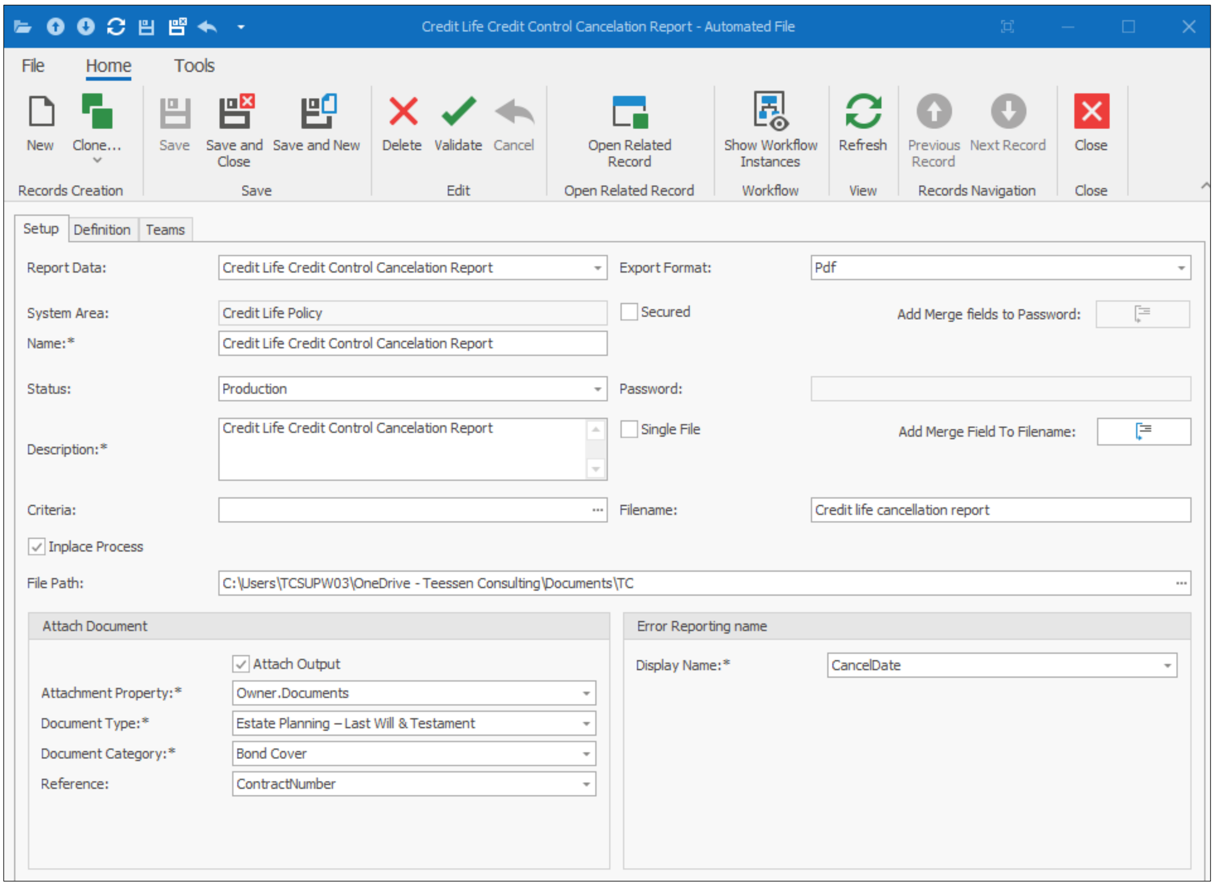
Remember to keep your SMS short. Once the set up has been completed, this Automated SMS process will appear as an 'Automated Process' for the relevant list views.

Refer to Automated Report section for details on Teams and Definition

Automated File

Use automated file to save a standardized file to your computer without having to browse reports or analyses.

This process is like Automated Reports with the difference that the file is saved and not emailed:



Fieldname	Description	Required
Report data	Select from drop-down the required criteria to generate the automated report.	✓
Name	Give your process a unique name.	✓
Status	Status will default to Development and only be an active field for users once in Production	
Description	Describe the outcome of the process.	✓
Criteria	Specify specific criteria applicable to this file	
In-place Process	Always select this to make the automated process available on relevant views based on the selected report data.	✓
File path	Select the folder where this file needs to be saved.	✓
Export format	Select the required format for the attachment from the drop-down menu.	✓
Secured	Select if you want to password protect this document.	
Password	Optionally enter a password.	

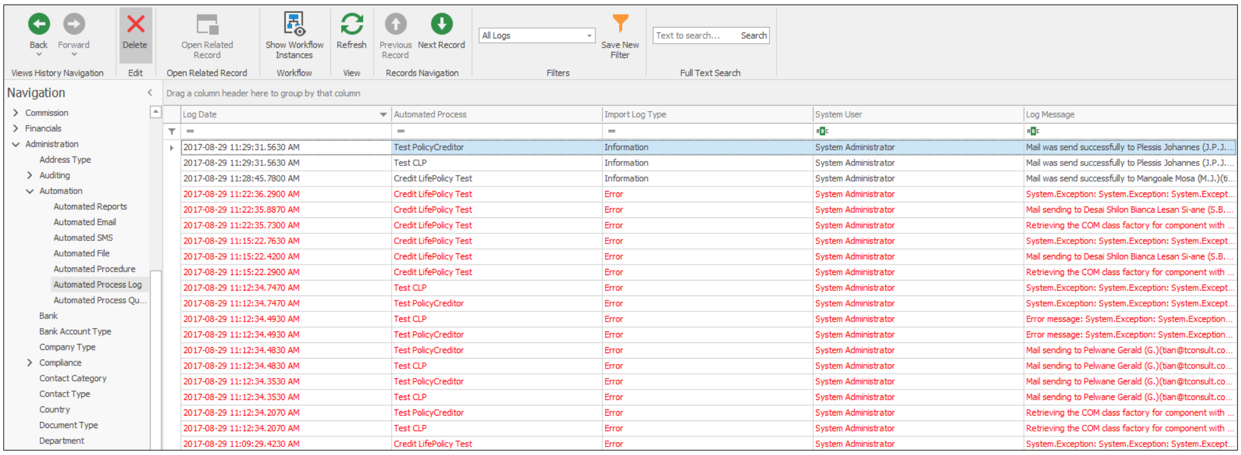
Single File	Enter the file name. You may also select to use merge fields in the file name, e.g., Statement number.	✓
File name	Capture file name	
Attach output	Select if you want to save the document to the application.	
Attachment Property	Select where the document needs to be saved.	
Document Type	Specify document type.	
Document Category	Specify document category.	
Reference	Enter a document reference.	
Display Name	The name you want to display in case of an error.	✓

Refer to Automated Report section for details on Teams and Definition

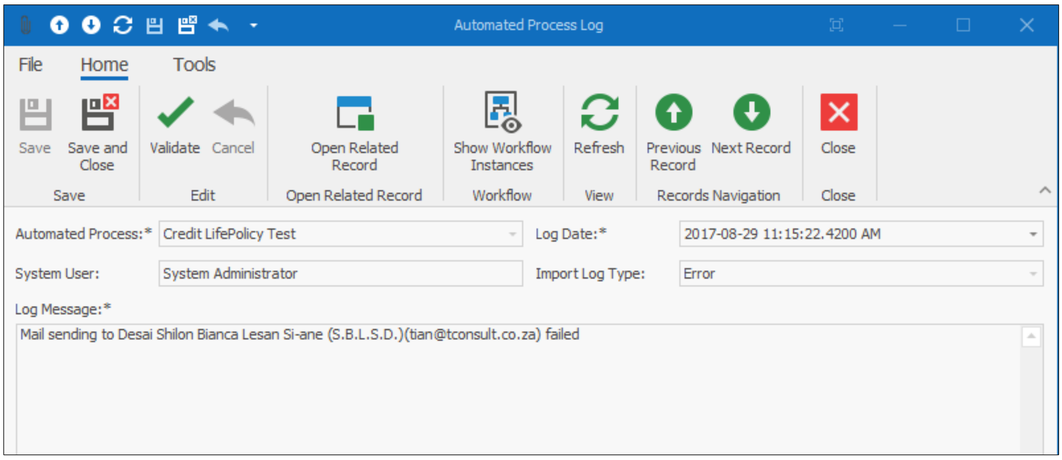
This automated file process will appear as an 'Automated Process' on the relevant list views.

Automated Process Log

The Automated Process Log keeps record of all automated processes performed:

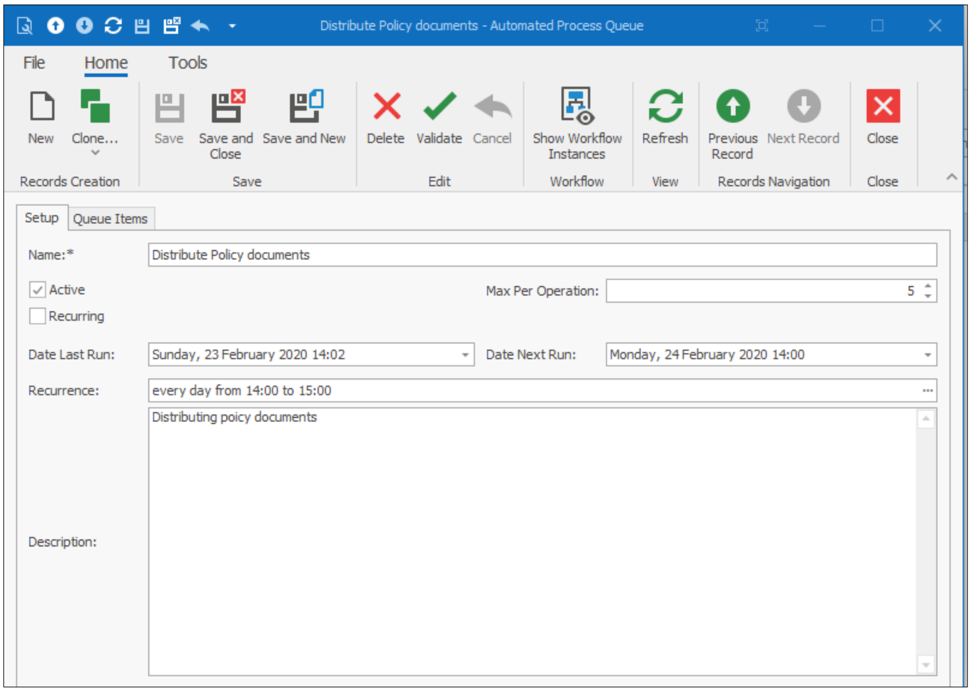


Open a specific log to view error message.



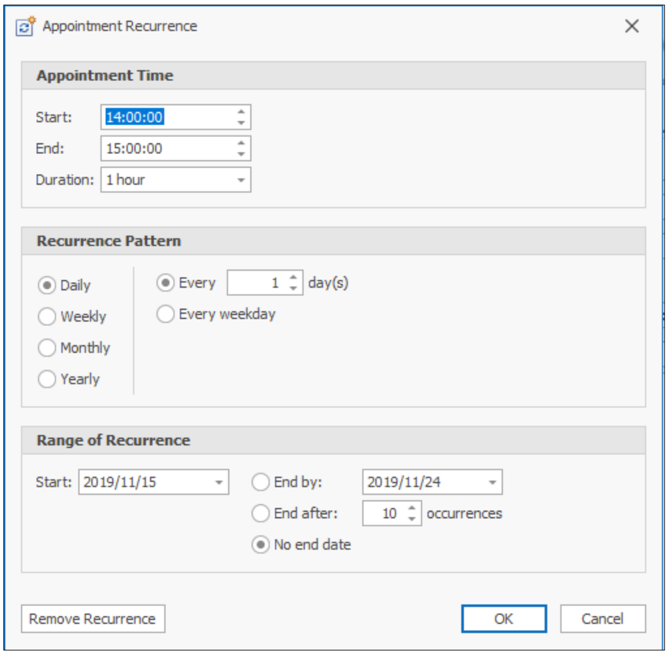
Automated Process Queue

Automated processes can be added to a queue to be distributed at a specified date and time.

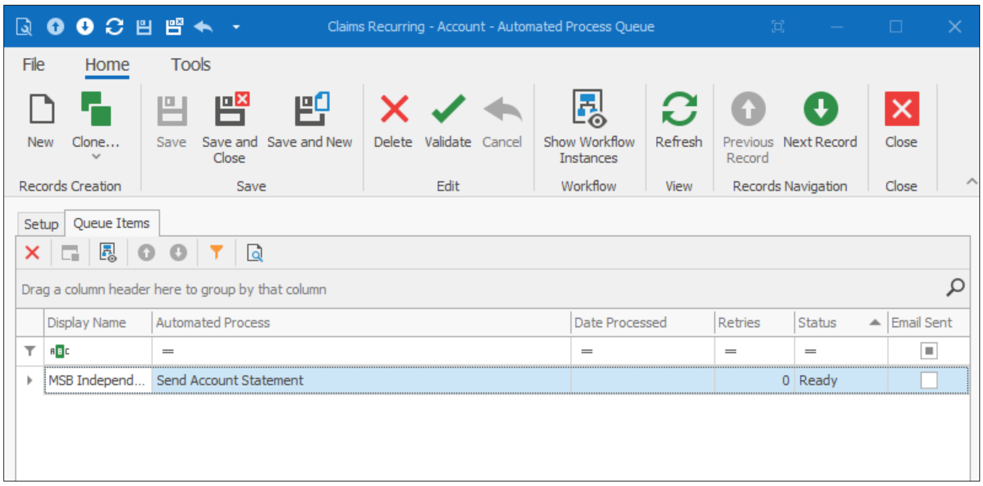


Fieldname	Description	Required
Name	Assign a unique name to the queue	✓
Active	Only active queues will be available to users for selection	
Max per Operation	Select a maximum number of retries per operation should the initial email fail to send	
Recurring	Select when the same item needs to be resent multiple times	
Date Last Run	Displays when last the process was executed	
Date Next Run	Displays when process will be executed next	
Recurrence	Set the recurrence detail	✓
Description	Enter a detailed description for this process	✓

Set Recurrence details



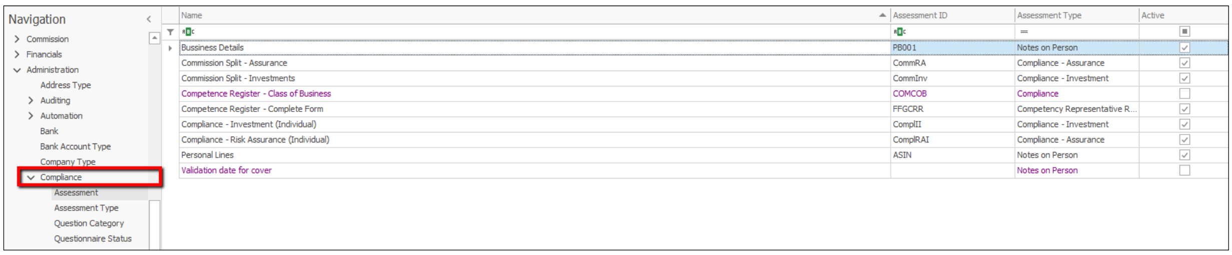
View queue items



Compliance

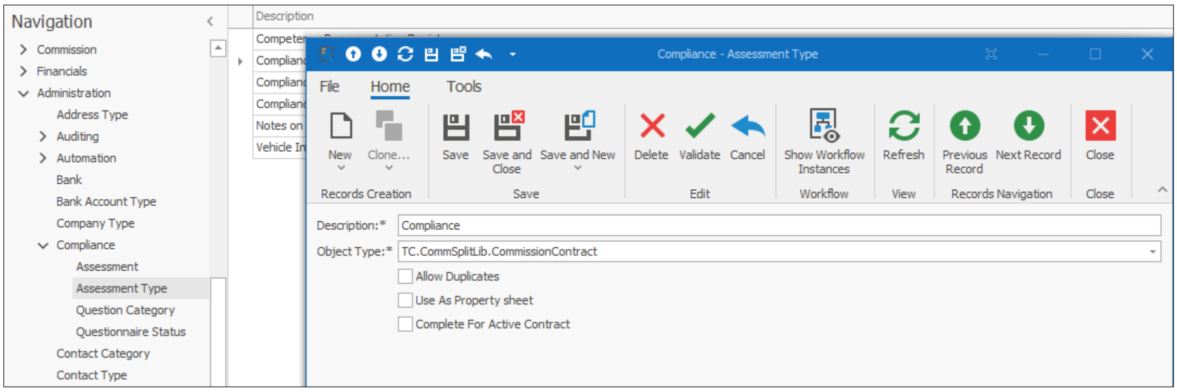
Questionnaires can be used to compile information in standardised data sheets.

This information can be used in standard forms and reporting.



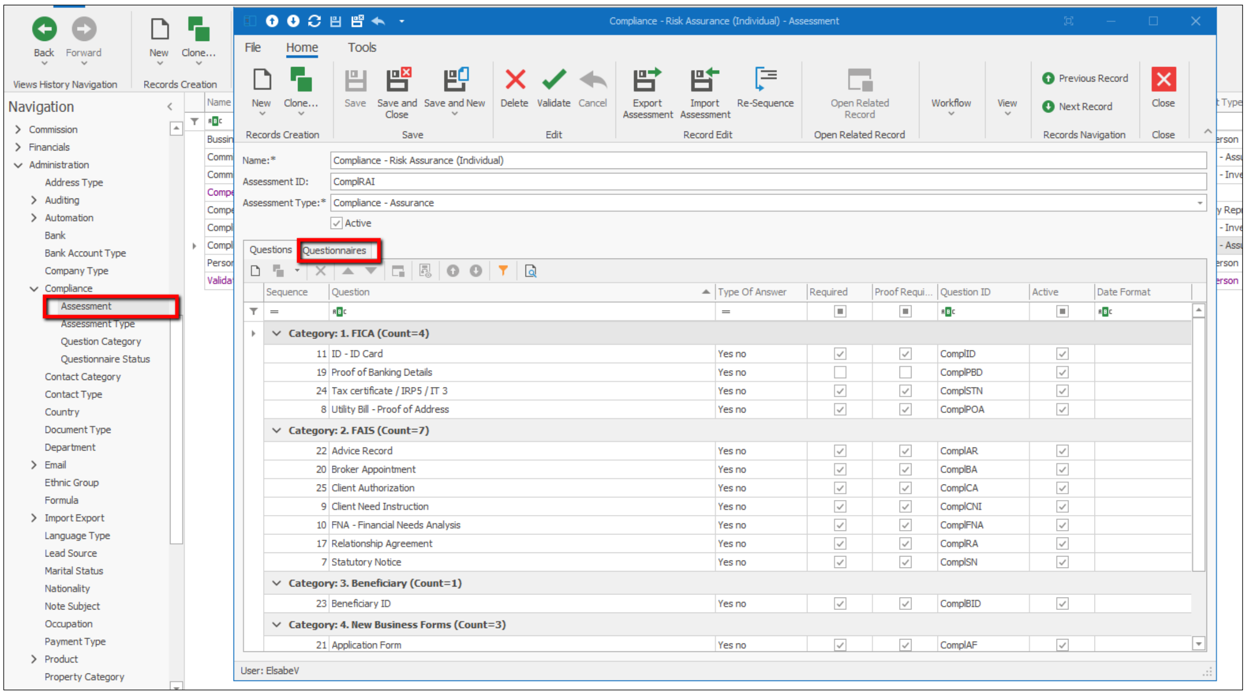
Assessment Type

Assessment type is linked to an object type which will determine where this type of Assessment will be applied in the application, e.g., Compliance linked to a Commission Contract.

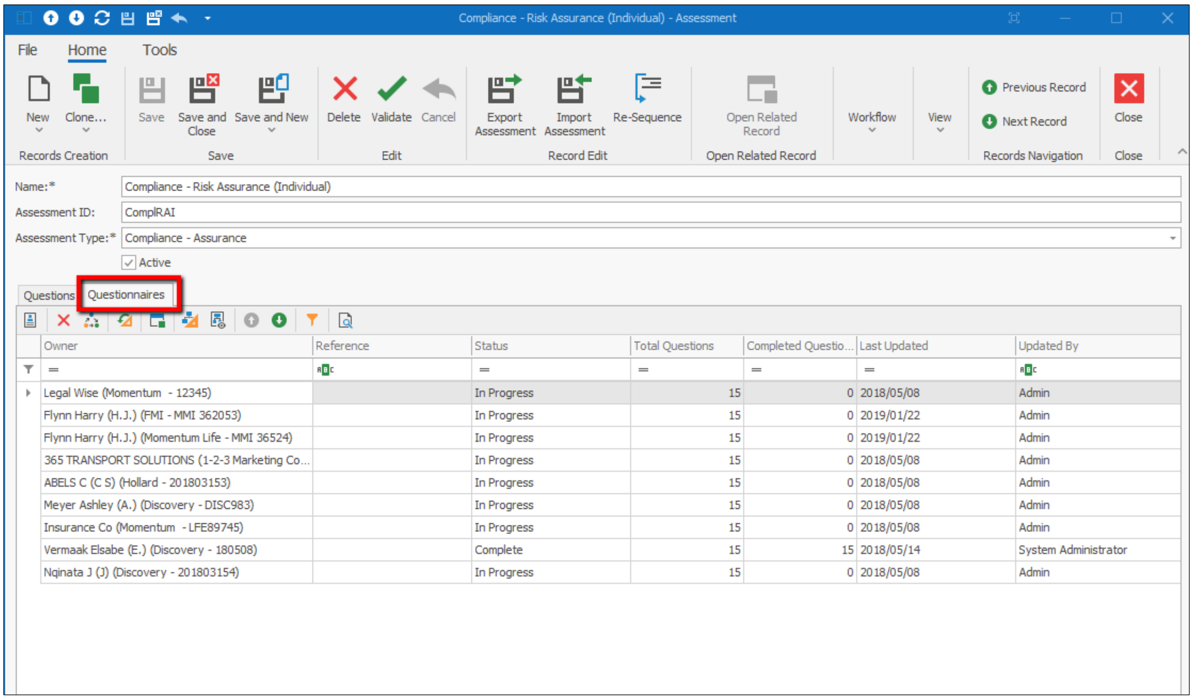


Assessment

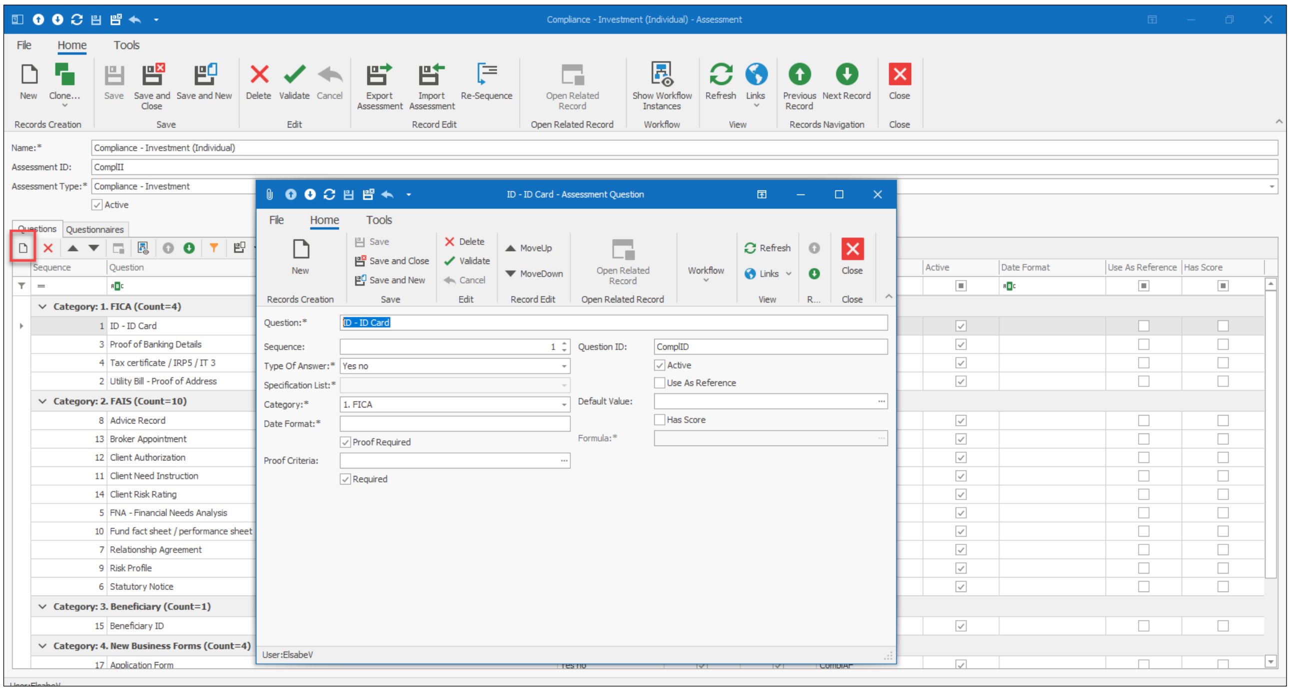
Once assessment types have been set up, you can formulate the actual questions for the questionnaire.



A list of all Items linked to this questionnaire is visible on the Questionnaires tab.



Formulate Questions

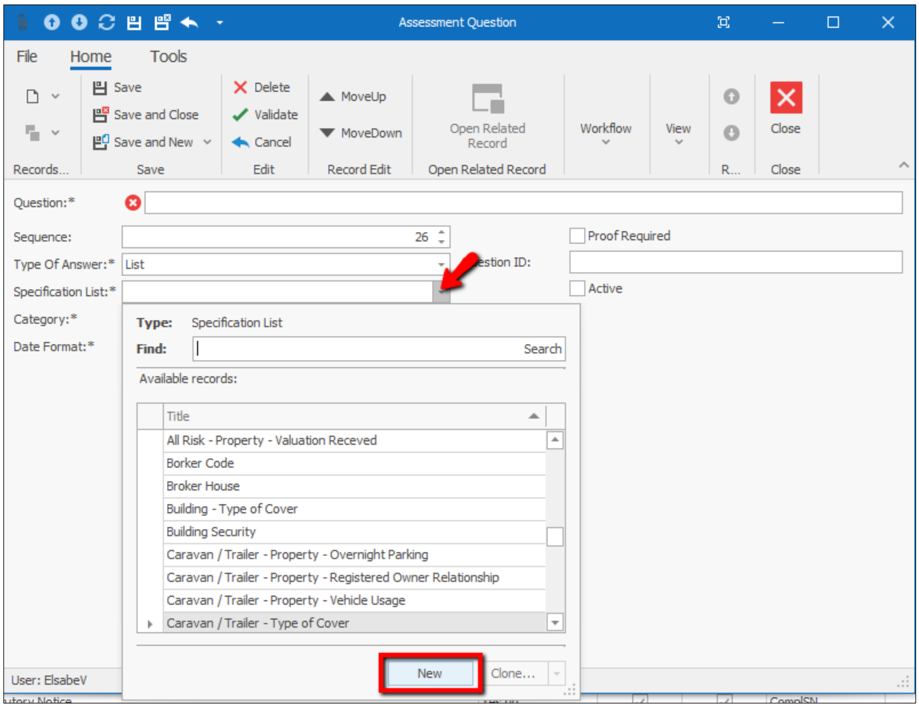


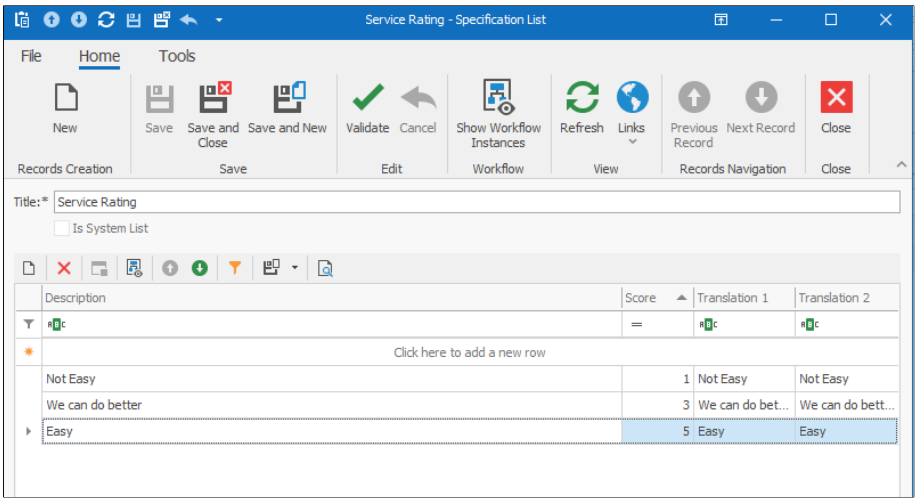
Fieldname	Description	Required
Question	The question that needs to be answered	✔
Sequence	Sequence in which this question must appear on questionnaire	
Type of answer	Determines the data type of the answer, i.e., text, numeric, date etc.	
Specification list	You can set up a list of possible answers to select from	
Category	Categorise questions	✔

Date Format	Enter your preferred date format, e.g., dd/MM/yyyy
Required	Select if an answer is required
Proof Required	Select if relevant documentation for this question needs to be attached
Proof Criteria	Add specific criteria to this document to limit the type of document that can be attached e.g., Document type = Copy of ID
Question ID	Assign a unique Question ID for reporting purposes
Active	Choose to activate question or not
Use as reference	System use only
Default value	System use only
Has Score	Tick box will apply score specified on the Specification list to this question/answer
Formula	System use only

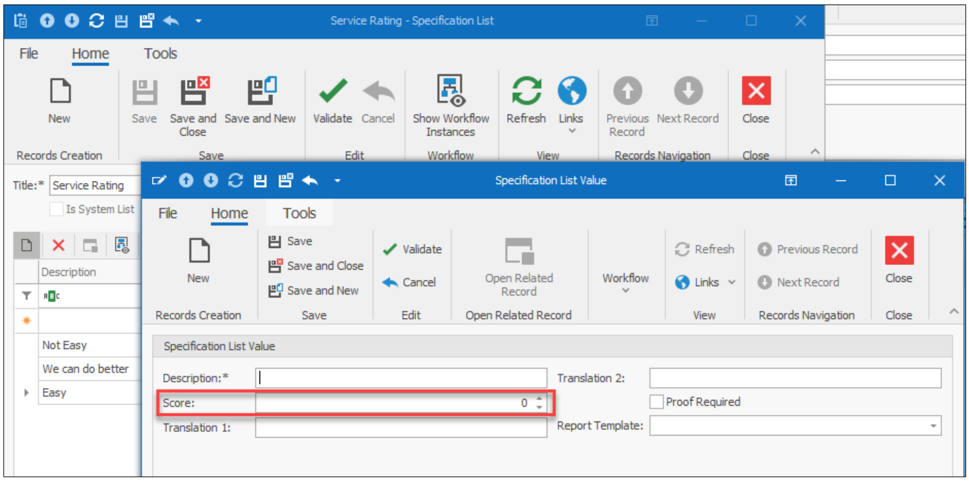
Specification list

Select a pre-setup list from the drop-down menu or set up a new list:

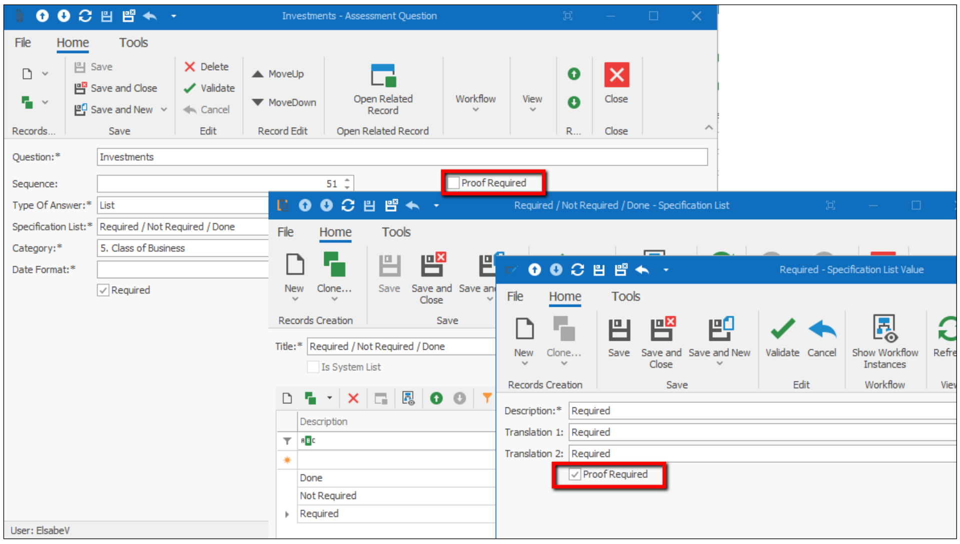




Apply a score per answer to calculate an overall score on questionnaire.



Proof required can be set on question or on answer or on both.



Questionnaire Status

Set up the questionnaire statuses which will be available for the user to select.

When ‘Use as default’ is selected, this status will display by default once the questionnaire is opened.

When ‘Can Edit’ is selected, the user will be able to change the status of this questionnaire when needed.

Questionnaire status can be controlled by use of State Machine i.e., status cannot be changed to ‘Completed’ if all required questions have not been answered.

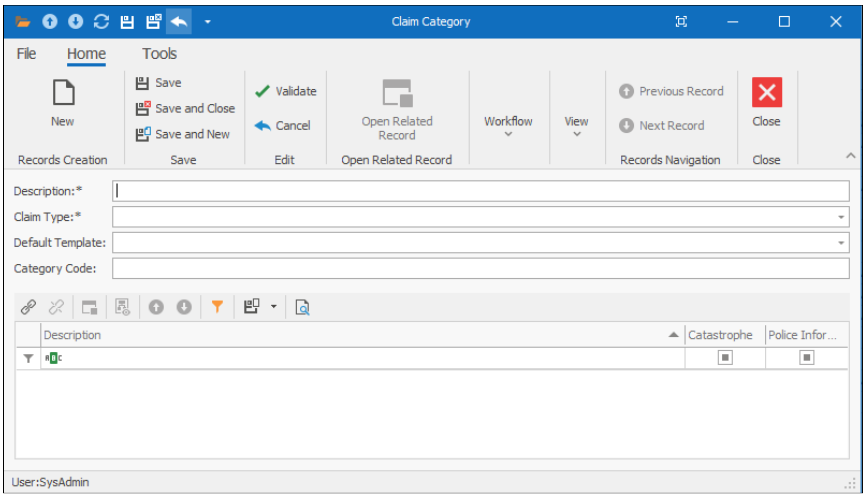
Please refer to State Machine section in this document.

Claim

All Claims must have a Category, Cause for Claim as well as Claim Status.

Claim Category

Create claim categories relevant to the specific area on which this category is applicable



Fieldname	Description	Required
Description	Category unique description	✓
Claim Type	Select system area on which this category is applicable i.e., short term, credit life, assurance or funeral	✓
Default Template	Apply default text template if applicable	
Category Code	Enter a category specific code which can be used to auto populate claim number.	
Cause of claim	Link cause of claim applicable to this claim category	

Please note: you may have more than one Category Description, but linked to different Claim types i.e., Category name = Death + Claim type = TC.Contact.ExtendedServices.AssuranceClaim and Category name = Death + Claim type = TC.Funeral.FuneralClaim

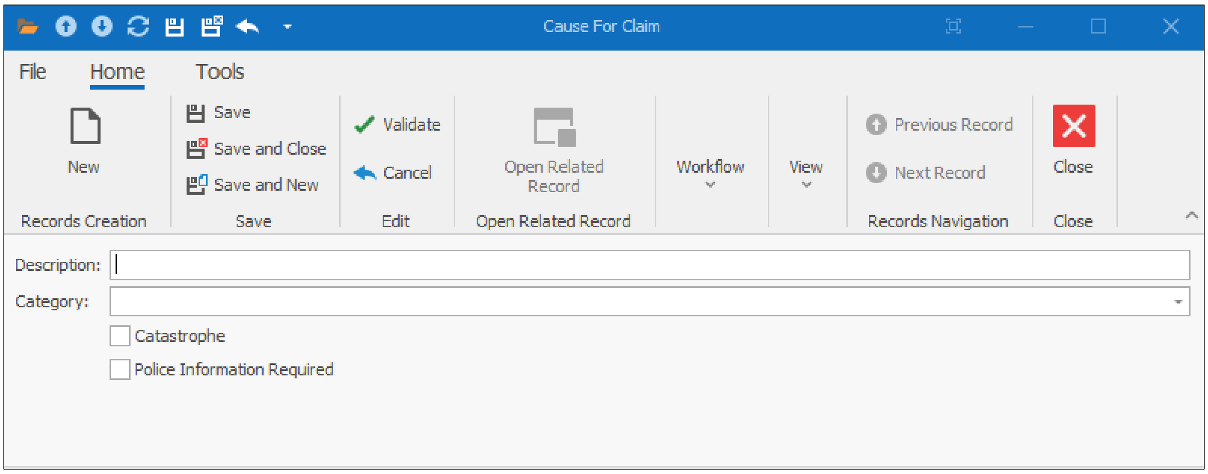
Claim Category must be linked to at least 1 cause of claim and thus it is important to capture cause of claim first.

Cause of Claim

Create a list of claim causes linked to a specific claim's category.

Select Catastrophe and/or Police Information required where applicable.

These fields will not be available when registering a new claim if not specifically applied on the cause of claim.



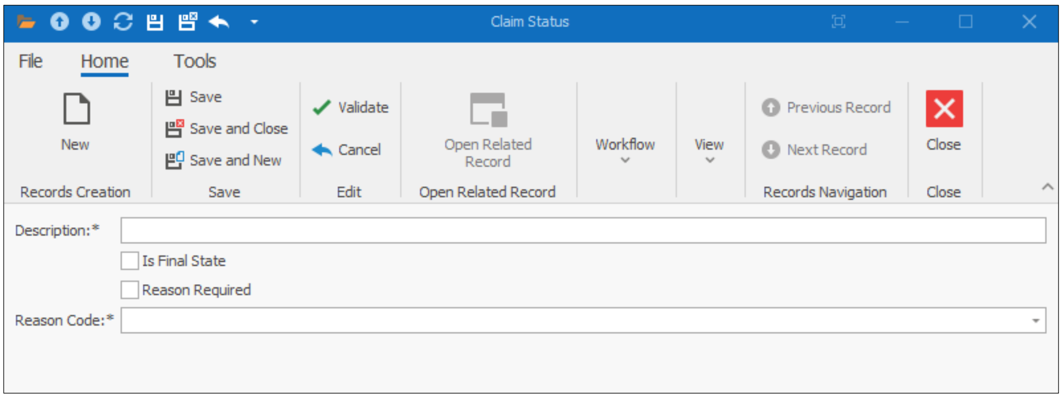
Claim Status

Each claim has a start and end status with specific rules and reasons attached to it.

Create a list of claim statuses to be selected when administering a claim.

'Is Final State' means that the claim is finalised and should not be altered thereafter i.e., Cancelled, withdrawn, rejected, suspended etc.

A specific reason per claim status can be applied i.e., Rejection reason = no cover



Document

Each document saved onto the application must be linked to a category and document type.

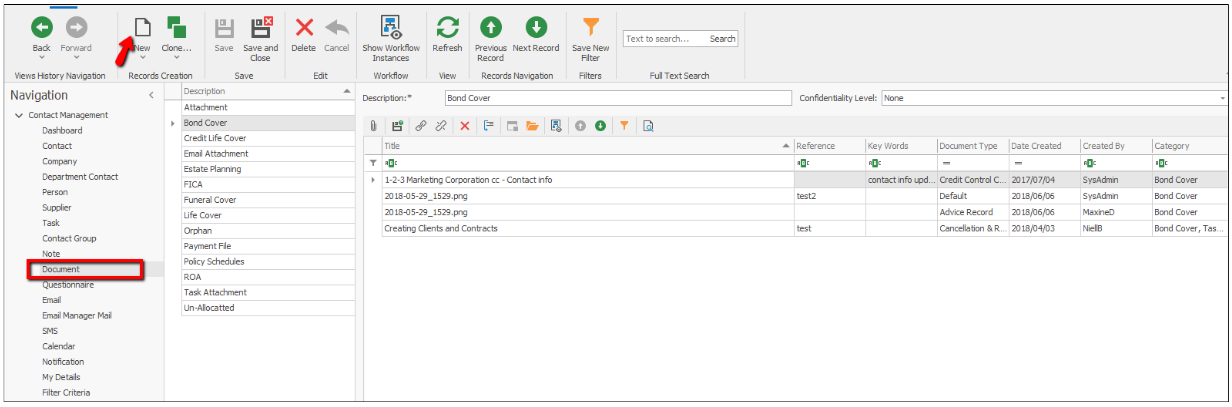
Users can only select document categories and document types that have already been set up.

Take care in creating your document hierarchy as this will determine how efficient a document can be searched.

Document types and categories are also linked to automated processes.

Document Category

To create Document Categories, navigate to Contact Management > Documents:

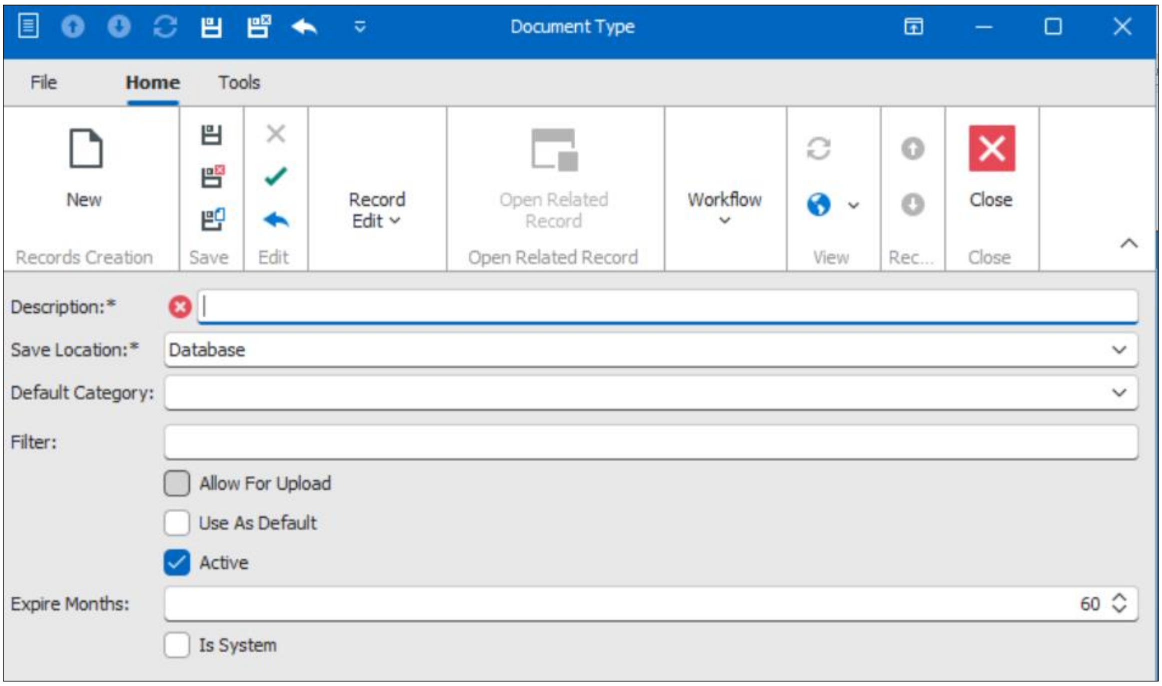


A document should always be linked to a contact or contract or both, a task or claim.

Confidentiality levels can be set per category or document.

Document type

Document type further defines a document.



Fieldname	Description	Required
Description	Describe the document type	✓
Save Location	Select location as either Database, Network, SharePoint or Azure	
Default Category	Assign a default category per document type	
Filter	Filter specifies the format in which a document must be saved to select this document type i.e., xlsl can only be used for Excel documents.	
Allow for Upload	To make document available for upload to Client Portal	
Use as default	Set as default document type	
Active	Not visible to users when Active is disabled	

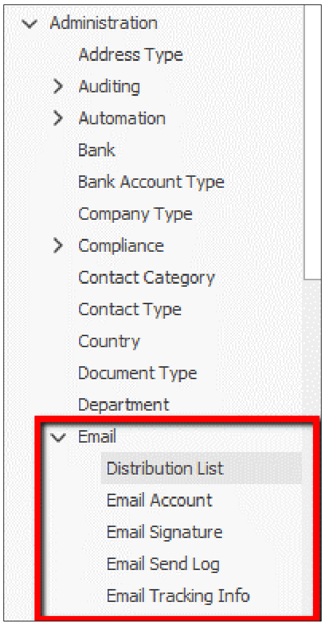
Expire Months	Add expire months to this document to indicate age analysis on list views. Expiry date is calculated from the date the document was created
Is System	Cannot be selected by user. Used for workflow purposes.

Email

Set up standardised distribution lists.

Manage Email accounts to be used throughout the application in various processes.

Set up email signatures.

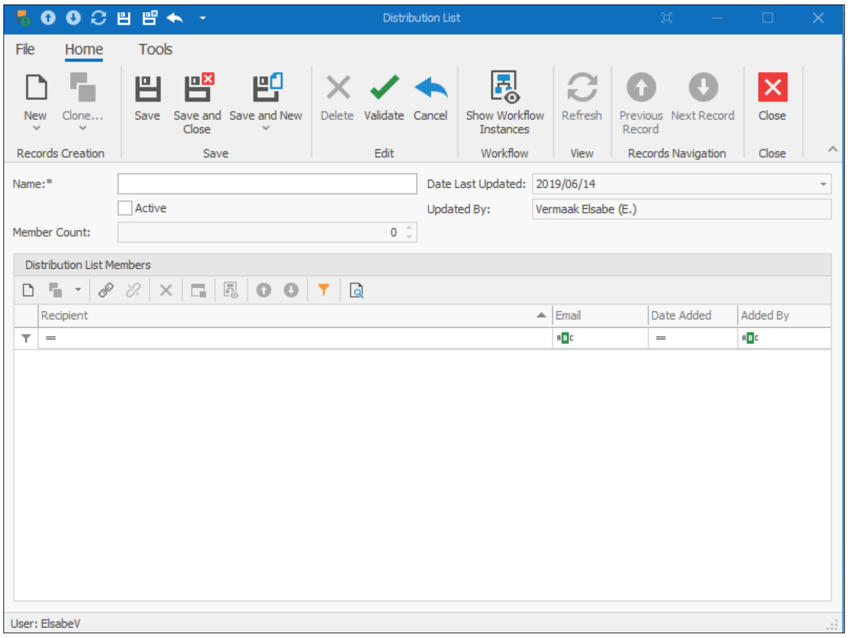


Distribution List

A distribution list provides the option to create a custom group of recipients with the purpose to distribute/send the same information, e.g., Newsletters, to each recipient.

This functionality does not replace the automated process of sending bulk emails or reports but work in conjunction with it.

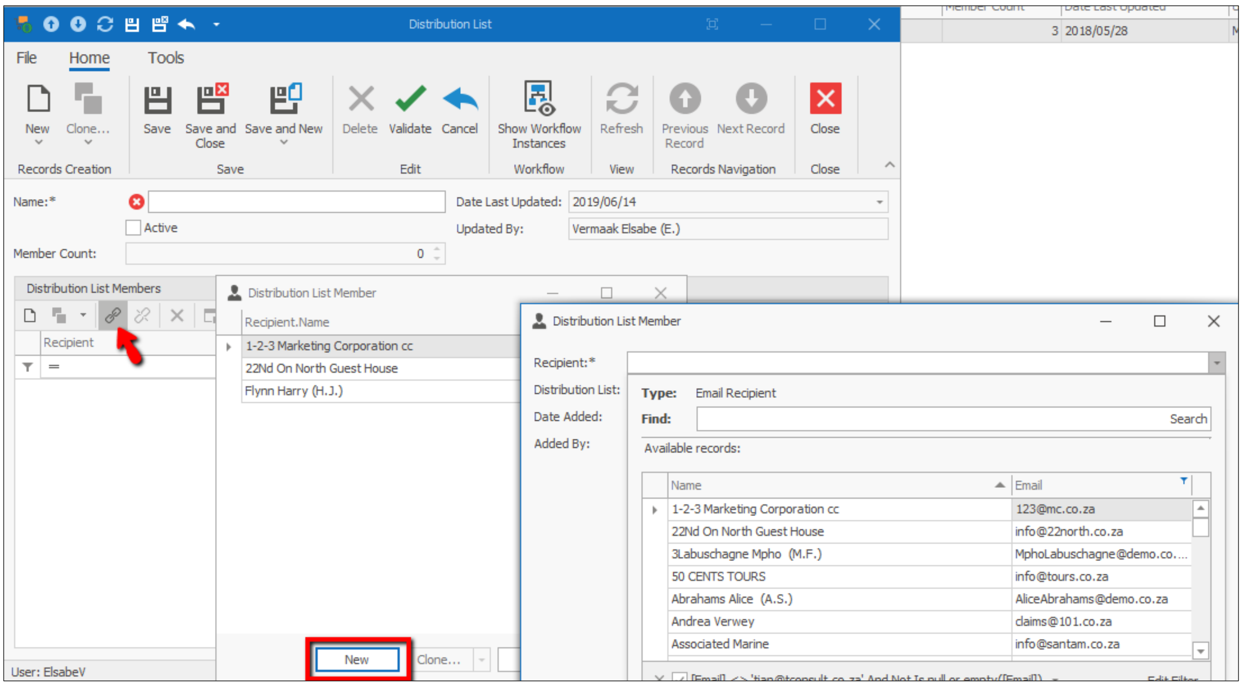
Click on ‘Distribution List’ and on ‘New’ from the menu bar to create a new distribution list.



Give the list a unique and proper name for users to easily identify. Add members from the database to a Distribution List or select to link members from an existing Distribution list. Note that when you link a member from one Distribution list to another, the member will be removed from the list where it currently exists. Mark the Distribution List as ‘Active’ if it should be available to use.

New Member

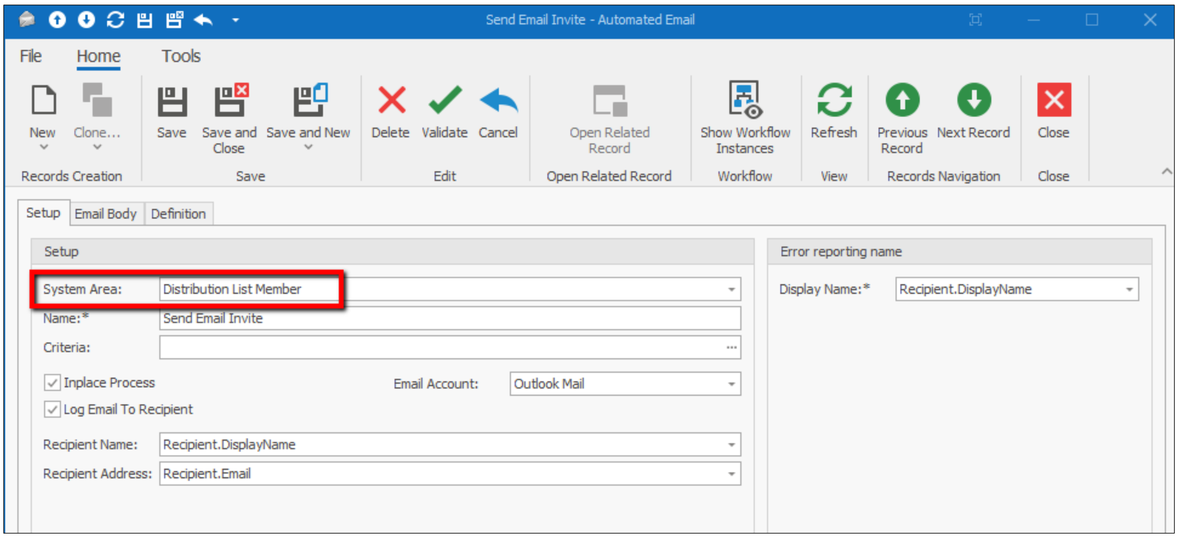
Select a new member from the database.



Users can also directly add a record from Contact, Company, Person or Department Contact to a Distribution list.

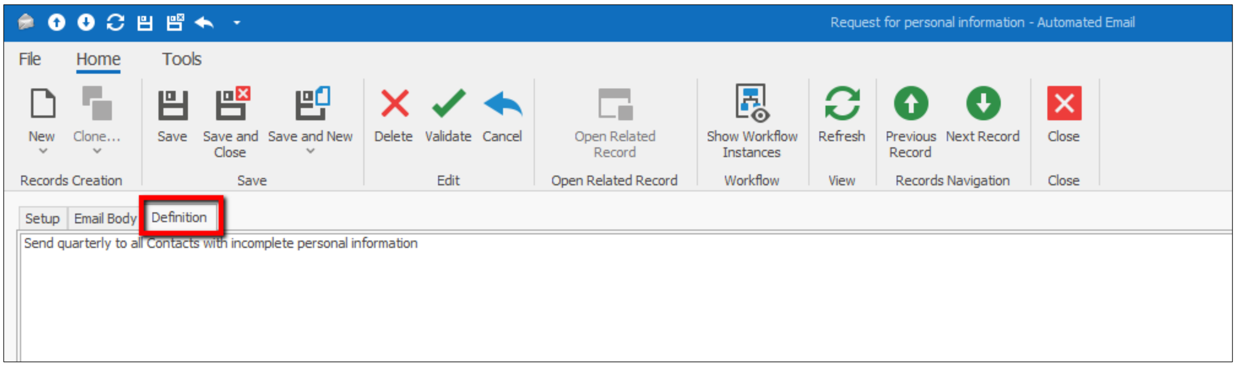
Create / Add information

To use an 'Automated Email' to be send to members of a Distribution list, the system area for the automated email needs to be 'Distribution list member'.



Please note that you are not limited to only use Merge Fields and values from Questionnaires in the email body.

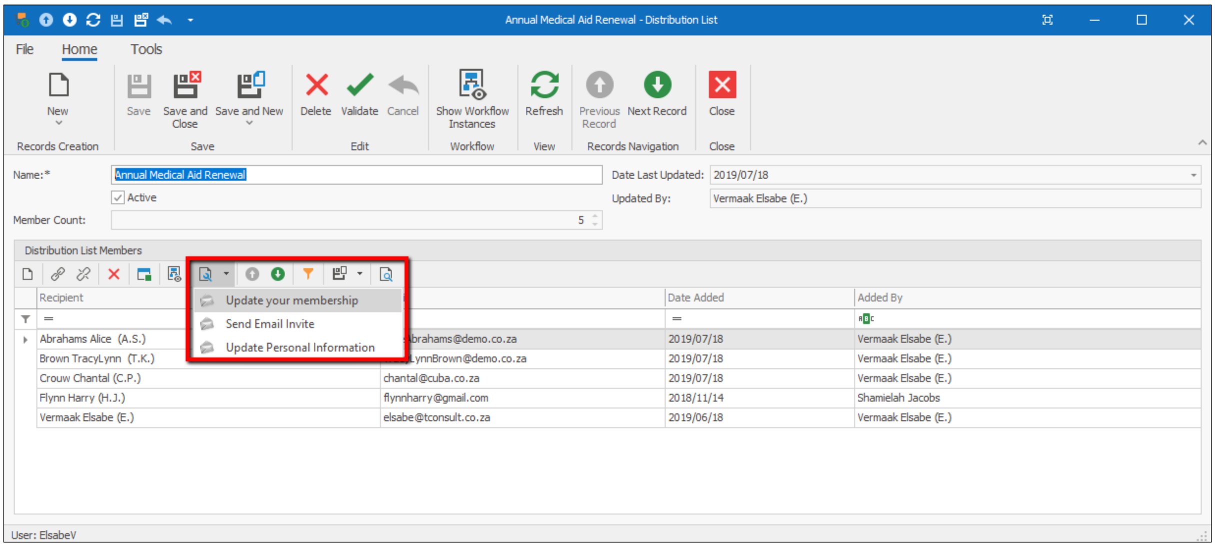
Images saved in a shared public folder i.e., https://url/Folder/file can also be used as an email body, e.g., Newsletter.jpg



Send information via a distribution list

Open the relevant distribution list and select all the recipients to be included in the auto-email process.

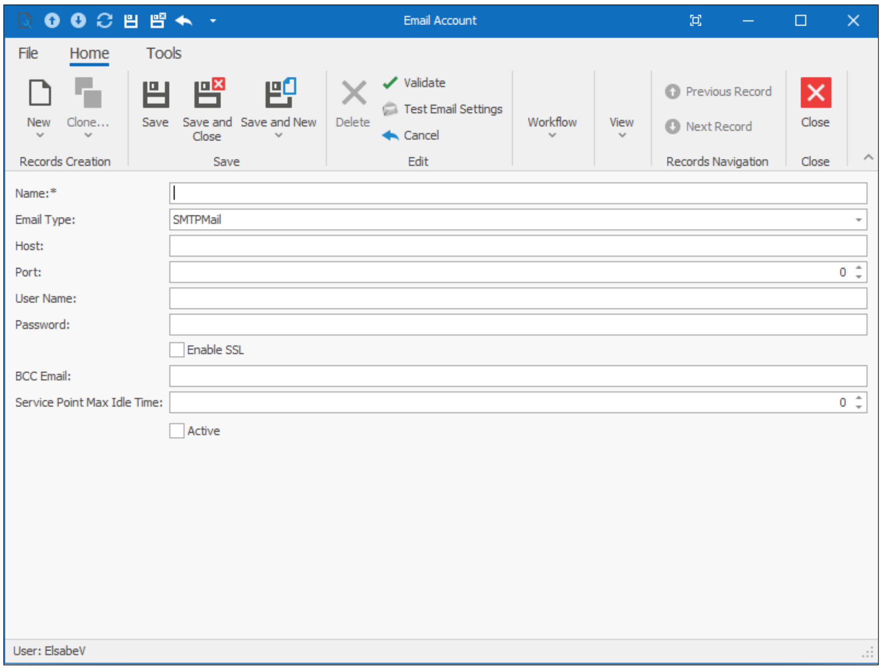
Click the 'Automated Process icon' and select the specific Automated email process from the drop-down list and follow the wizard:



Email account

Each user should have an email account linked to his/her user profile. This account will be used to send emails from the application.

Various email types can be configured. It is advisable to Test the email settings for authenticity.



SMTP and/or Web Mail

Simple Mail Transfer Protocol (SMTP) is a protocol used for sending email messages between servers.

Both SMTP and Web Mail use this protocol which should be obtained from your IT department or Service Provider.

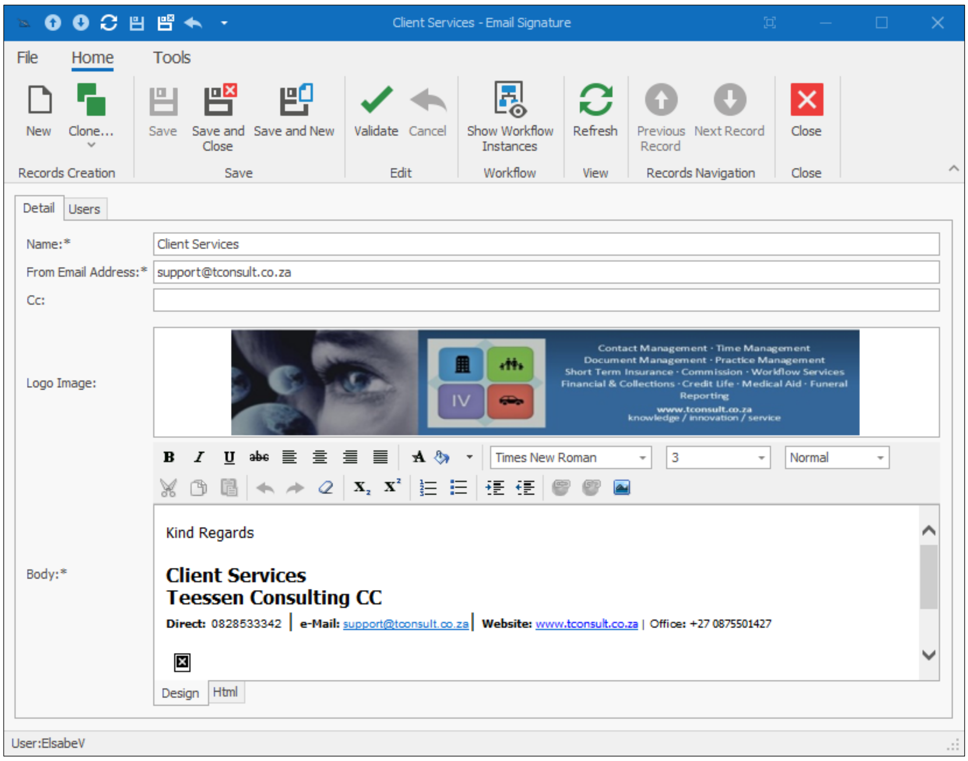
Typically used outside of your Company's network.

Outlook Mail
When selected the application will use the settings from your outlook account provided you are on your Company's network.

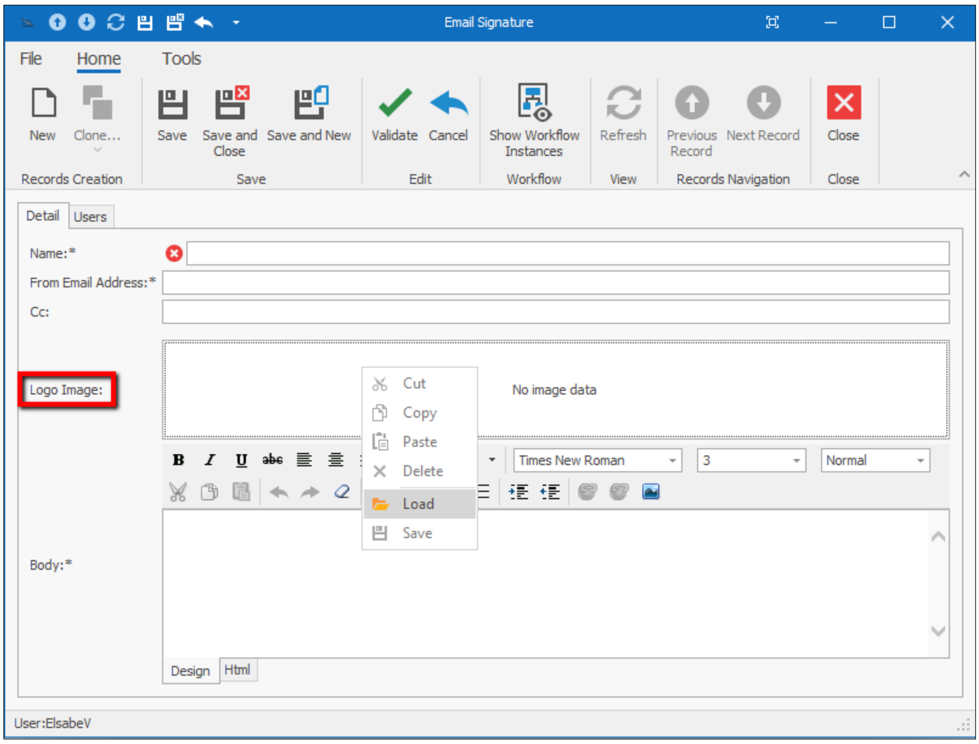
Database mail
Database mail is used to send bulk emails, i.e., Marketing material or Newsletters and is being set up in conjunction with Teessen Consulting.

Email signature
An email signature is mandatory for sending emails from the application. A user can be linked to multiple email signatures.

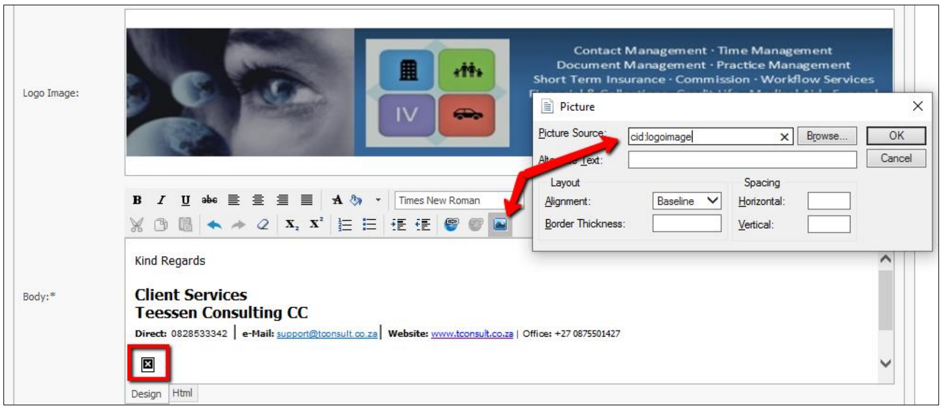
Add a default cc email address to which an email will be sent automatically when this signature is used.



Right click to load your company banner as the logo image:



Then use the image icon on Body section to insert this image in the required space:



Import / Export

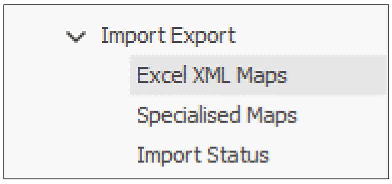
This functionality enables you to import bulk records from a spreadsheet or 3rd party applications by mapping the data fields to a system import map.

Importing plays a vital role in commission processing.

Excel XMLMap

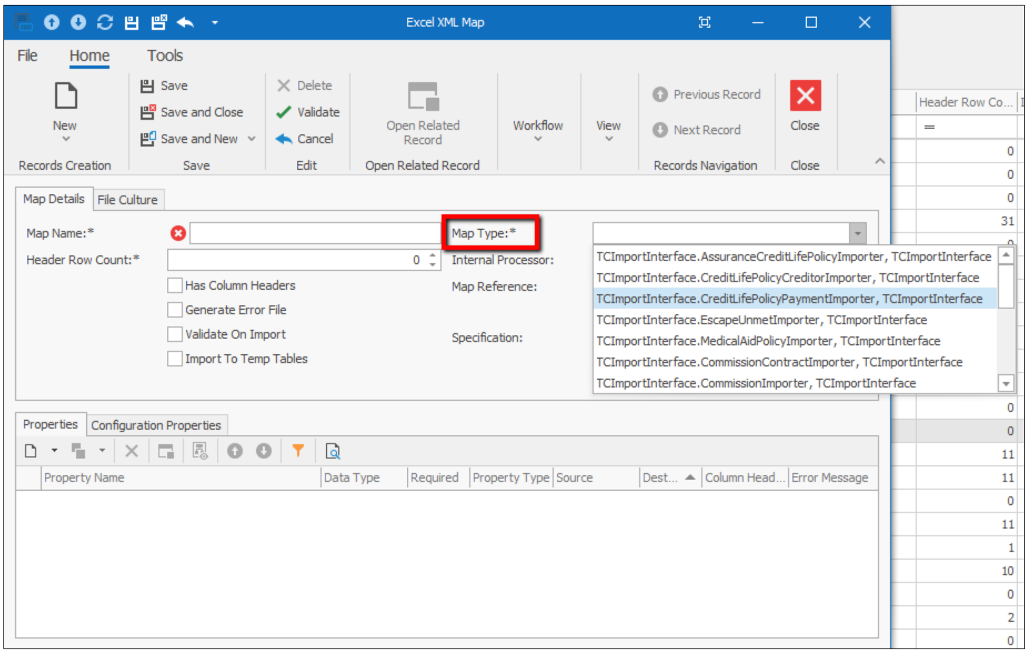
Excel XMLMap is a standard mapping tool which allows users to set up their own importing maps according to a simple spreadsheet of information.

Specialised Import Maps are pre-setup system maps based on a set of rules which applies to the format of a commission statement.



Various map types, specifying the area in which you want to import, are available to choose to import selected data.

Specifications on all import types are available on request.



Map Details

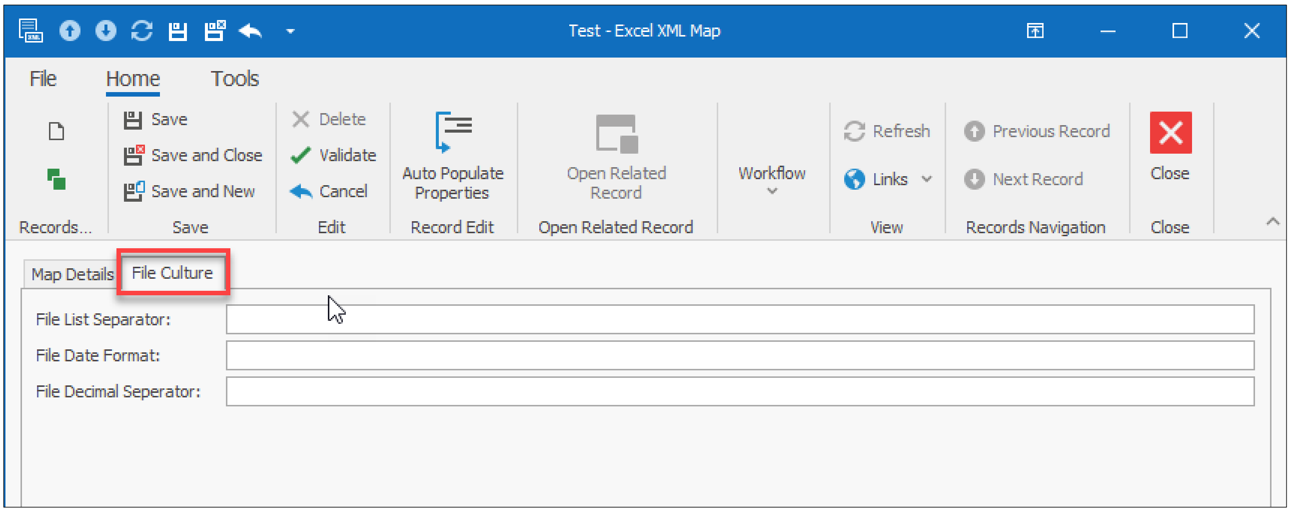
Fieldname	Description	Required
Map Name	Provide a unique name to identify the import map	✓
Header Row Count	Some data spreadsheets may have headers with various information and logos. These rows are not considered when importing.	
Has Column Headers	Should be selected when statement has column headers.	
Generate Error file	Recommended to always select this option to enable the application to create an error file should the import fail.	

Validate on Import	Recommended to always select this option as the layout of the file may change without notice.
Import to temp tables	Imports data into temp tables to be assessed before final import into database. Refer to Tools in this guide.
Map Type	Select relevant map type
Internal Processor	Option to select between Excel or Document server as internal processor. The application is not dependent on Microsoft Office application to process data.
Map Reference	Free text field
Specification	Link the file used to set up this map for future reference as the layout might change from time to time

File Culture

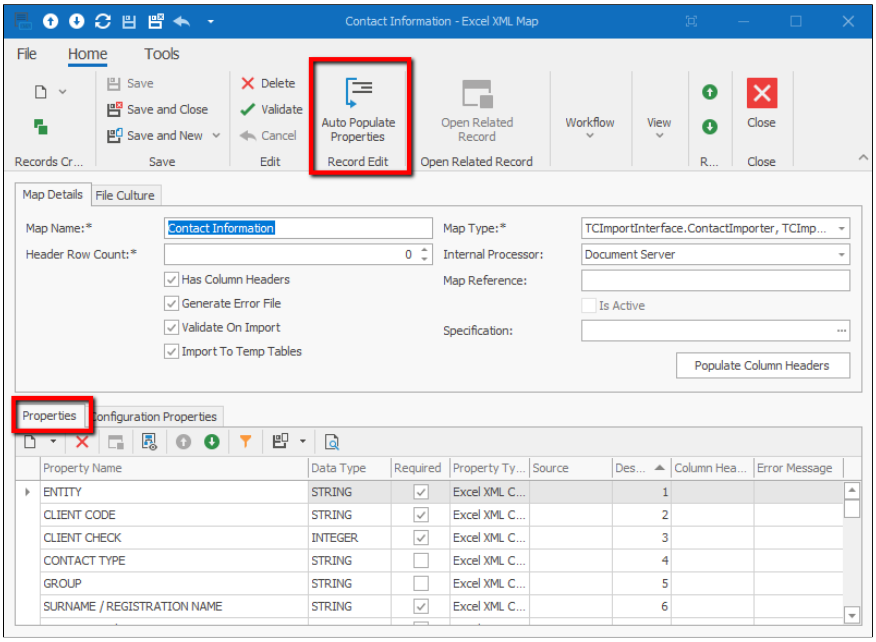
Txt files can also be imported with this feature, but the file culture is different from that of an excel or csv.

You can indicate the specific file culture on this tab.



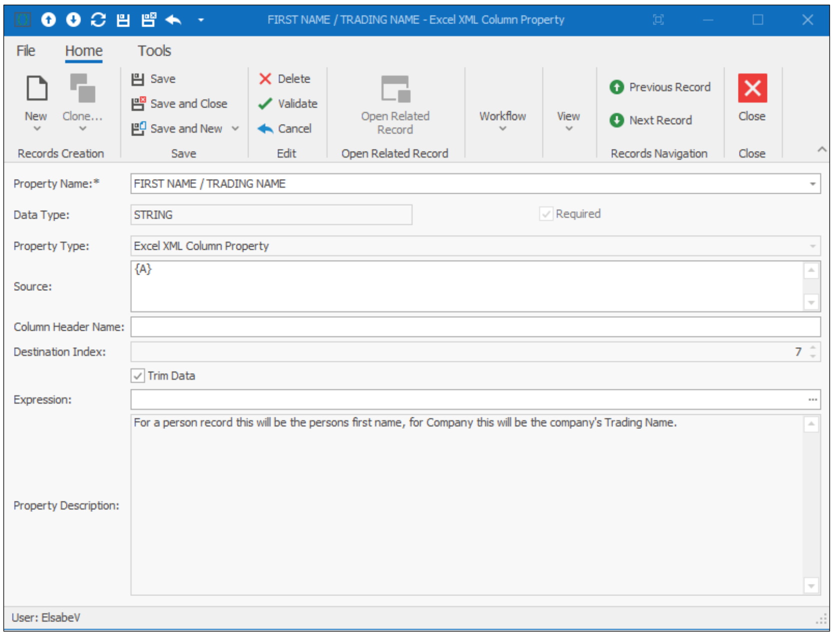
Properties

Auto Populate Properties to populate all required properties when only Column Properties are being used:



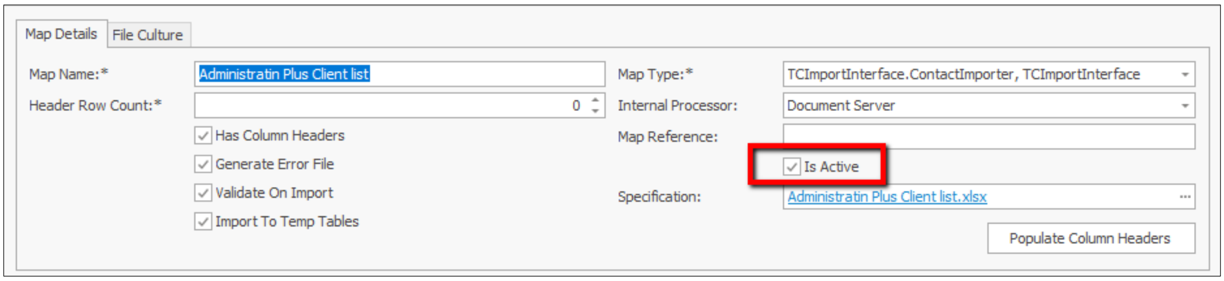
Alternatively select the New Property button to select each property field individually to indicate the Property Type required.

Each property Source must be linked to the data spreadsheet.



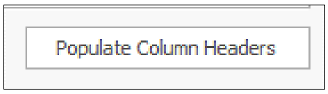
Please use the property description as guidance.

Only after all properties have been selected, will you be able activate this map

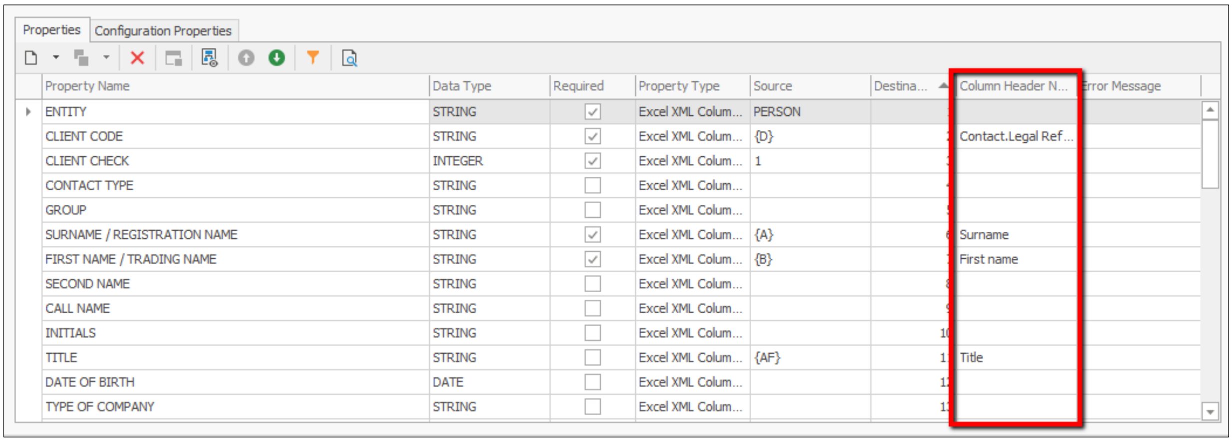


Click the elipsis button to link the file used to create this map:

Once the file has been linked, you can populate the column headers from the file to match the Properties where you have entered the details:

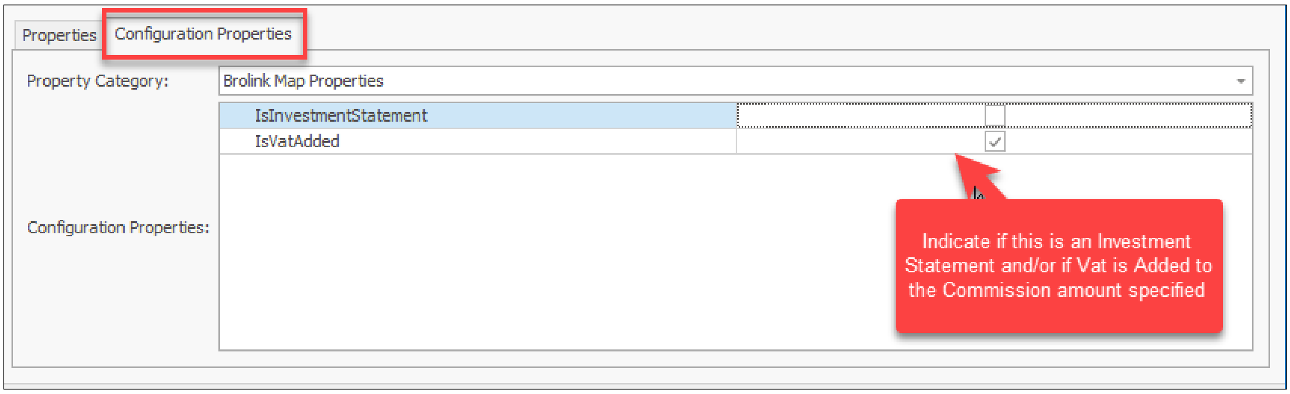


You are provided with an overview of your selections. These can be edited if necessary:



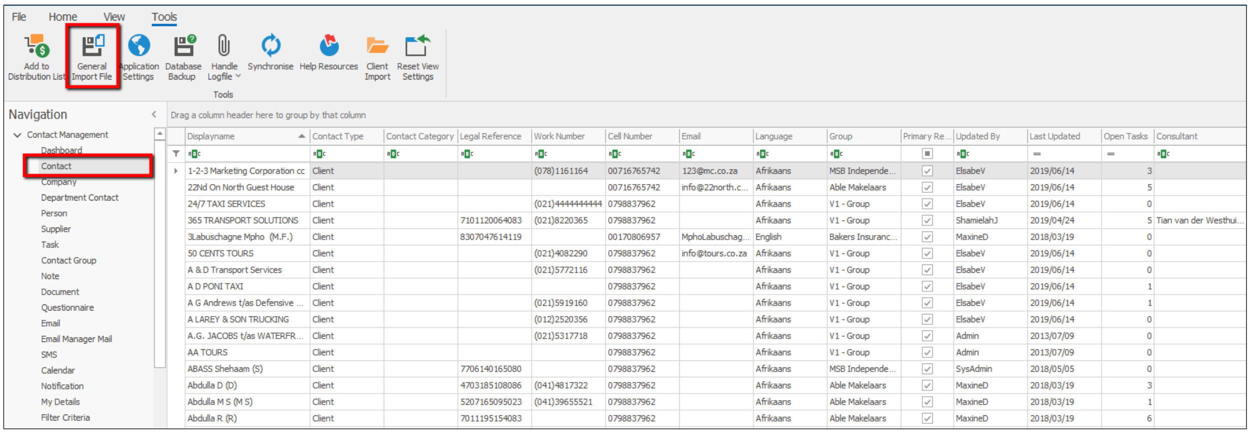
Property Name	Data Type	Required	Property Type	Source	Destina...	Column Header N...	Error Message
ENTITY	STRING	✓	Excel XML Colum...	PERSON			
CLIENT CODE	STRING	✓	Excel XML Colum...	{D}		Contact.Legal Ref...	
CLIENT CHECK	INTEGER	✓	Excel XML Colum...	1			
CONTACT TYPE	STRING		Excel XML Colum...				
GROUP	STRING		Excel XML Colum...				
SURNAME / REGISTRATION NAME	STRING	✓	Excel XML Colum...	{A}		Surname	
FIRST NAME / TRADING NAME	STRING	✓	Excel XML Colum...	{B}		First name	
SECOND NAME	STRING		Excel XML Colum...				
CALL NAME	STRING		Excel XML Colum...				
INITIALS	STRING		Excel XML Colum...				
TITLE	STRING		Excel XML Colum...	{AF}		Title	
DATE OF BIRTH	DATE		Excel XML Colum...				
TYPE OF COMPANY	STRING		Excel XML Colum...				

Configuration Properties

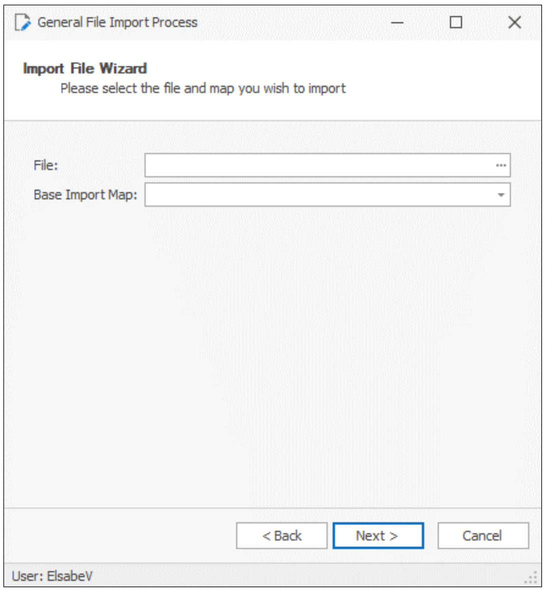


Importing data

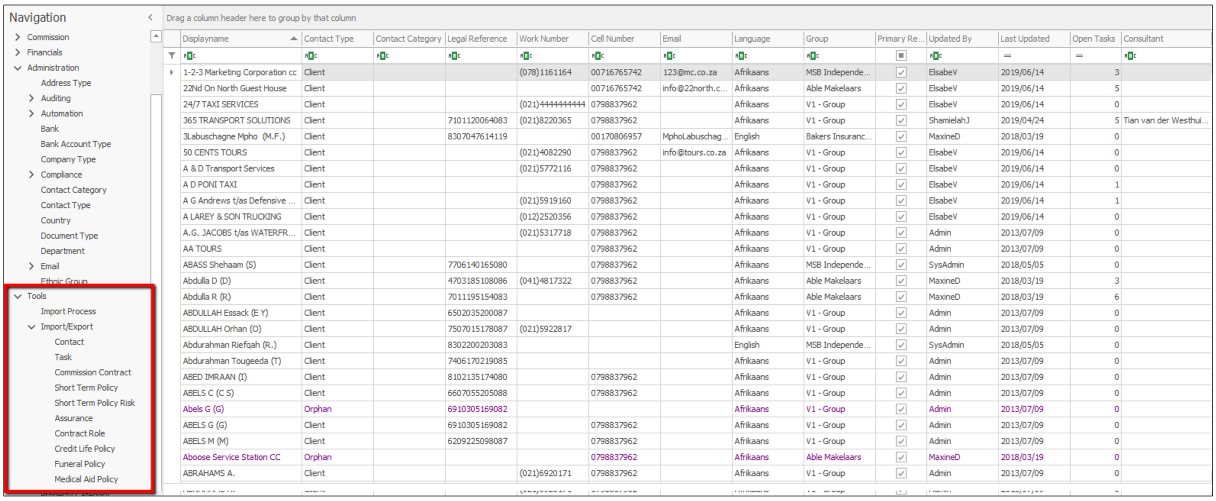
The ‘General import file’ option is available on almost all the system areas to which you can import. The data will be imported directly into the database.



The wizard will guide you through the process:



Alternatively, especially when temp tables are selected, you will find the specific importers on [Tools](#).



Specialised Import Maps

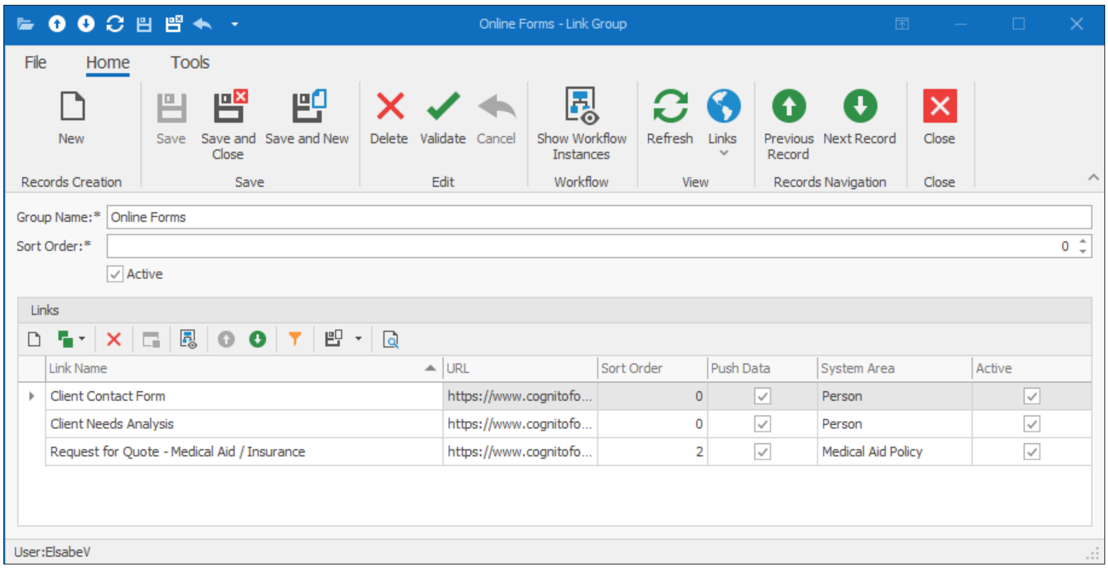
These import maps are system maps which have been pre-setup based on a set of rules which applies to the format of a commission statement.

Please contact us should you require a specialised map.

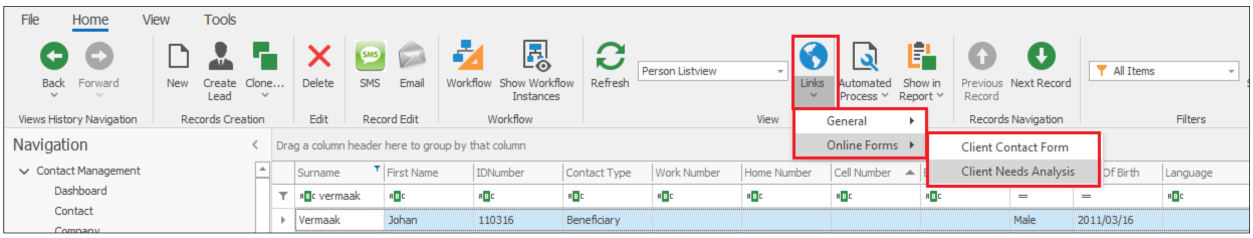
Link Group

Set up web links directly in applications which give users the ability to branch directly out to the web using a URL.

Create a new Link Group



Assign a unique Group Name to the link which will group all the links below when navigating to the Links action in the Action bar.



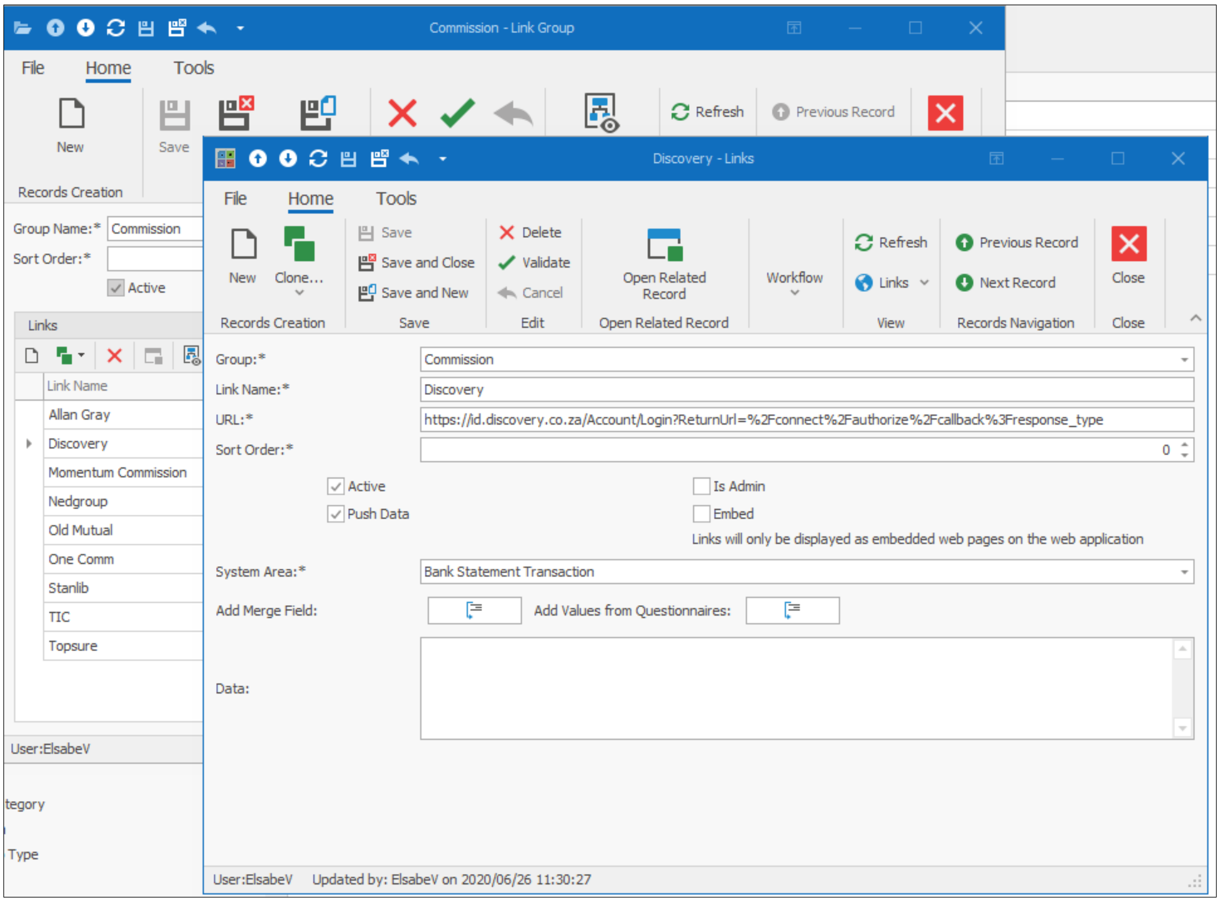
Create a new Link

Link or change Group to which this Link will be applicable

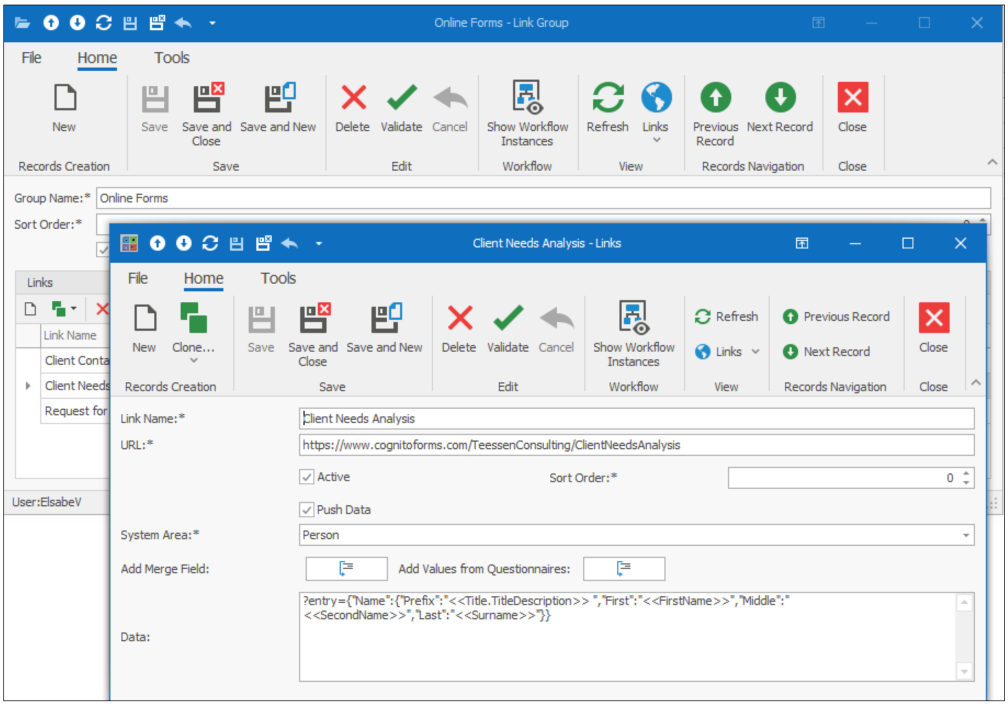
Capture a unique Link Name to easily identify what this link is for, e.g., browse to Discovery Website.

Enter the relevant URL.

Use Push data to specify the system area in which this link must be available and to add Data criteria to be used, e.g., in Online forms.



Embedded links will only display as embedded web pages on the web application:



Please contact us to set up Data criteria.

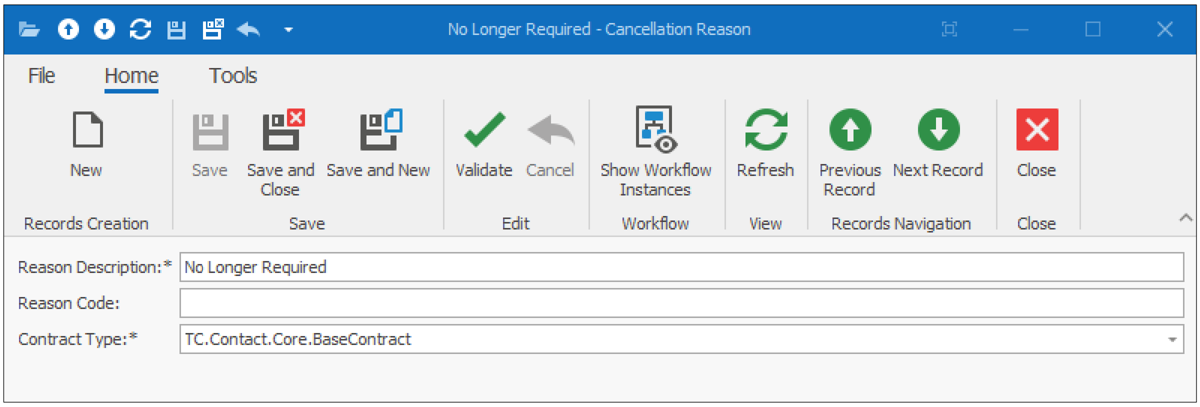
The link will be available on all system areas if push data is not selected.

Product

Set up Cancellation Reasons, Contract Roles and Product Statuses that can be selected throughout the application.

Cancellation Reason

Set up various cancellation reasons per Contract Type which can be selected when Contract status is in Final state i.e., Cancelled.



Add a Reason Code to differentiate between same descriptions for different system areas as well as for reporting purposes.

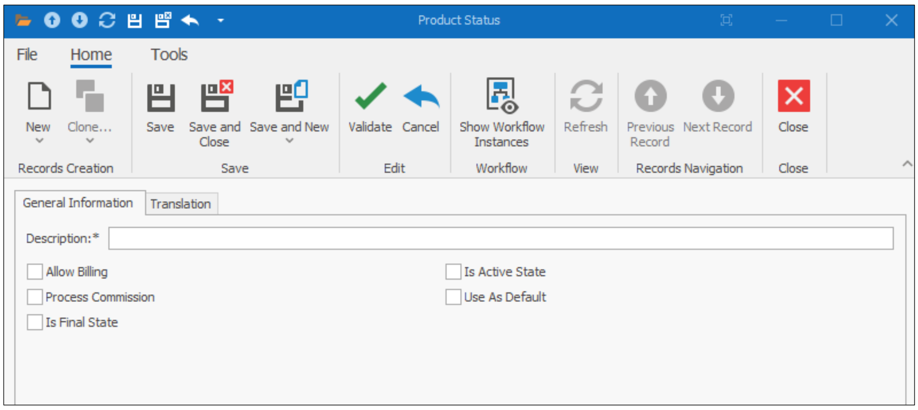
Contract Roles

Specific Contract roles needs to be set up on each Product within the application. Users can then select the appropriate role when capturing a new Contract.

This is especially applicable to Funeral and Medical Aid where Dependents and/or Beneficiaries are linked.

Product Status

Set up various product statuses with specific control specifications. Statuses can be used in conjunction with one another



Fieldname	Description
Allow Billing	Required if this status is used for collection premium through month-end process
Process Commission	Commission can only be processed if selected in conjunction with Is Active State
Is Final State	Select for statuses like Cancelled, Lapse etc. The application will prompt the user for cancel date and cancel reason when selected
Is Active State	This should not be confused with the “Active” status. Is Active state means that a certain process can be done, e.g., process commission. Use in conjunction with Process Commission.
Use as default	At least 1 status should be selected as default

Product statuses can be controlled by using State Machine criteria or a specific workflow setup.

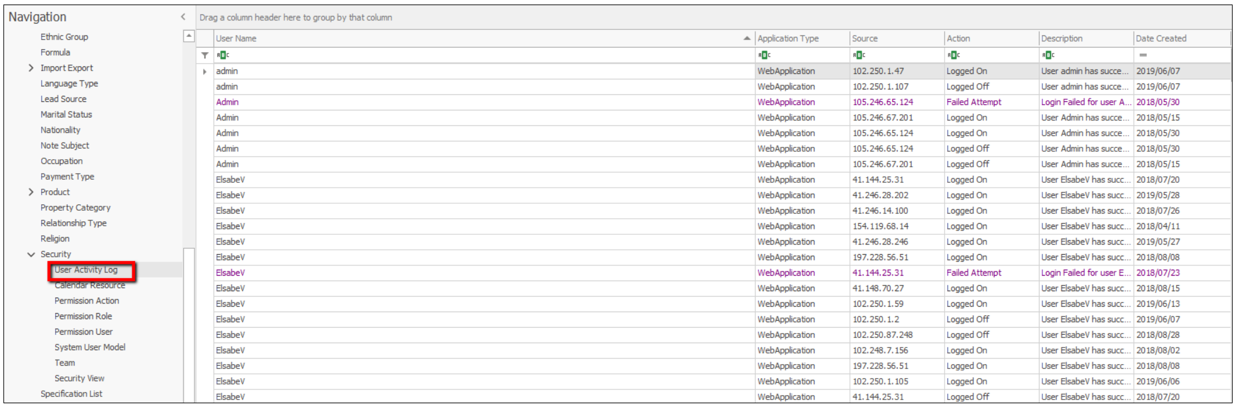
Please refer to State Machine section.

Security

As Systems Administrator you have limited access to certain Security functionalities.

User Activity log

Displays user login activity:

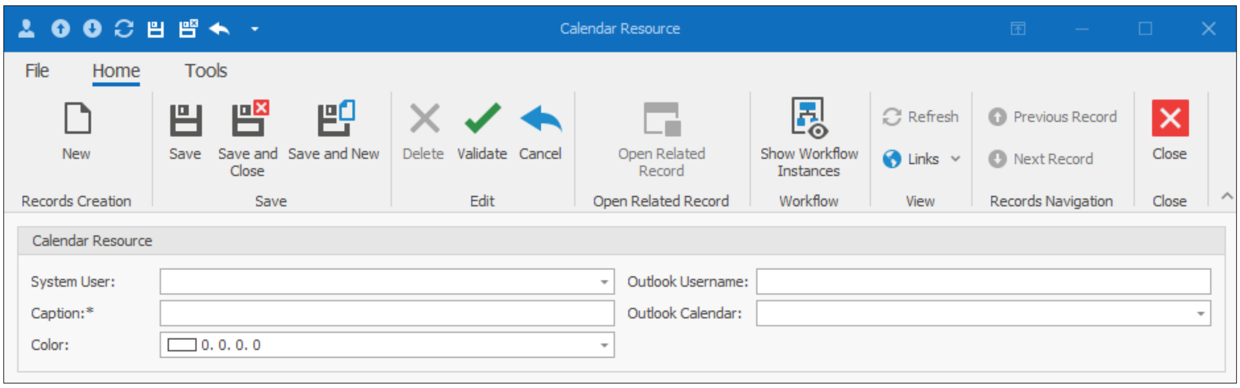


This functionality is not active by default and must be requested.

Calendar Resource

Calendar Resources must be specified in order to use Calendar in the application.

Outlook Username and Outlook Calendar are not applicable fields as the application is not integrated with Outlook.



Permission User

Limited access to Permission user

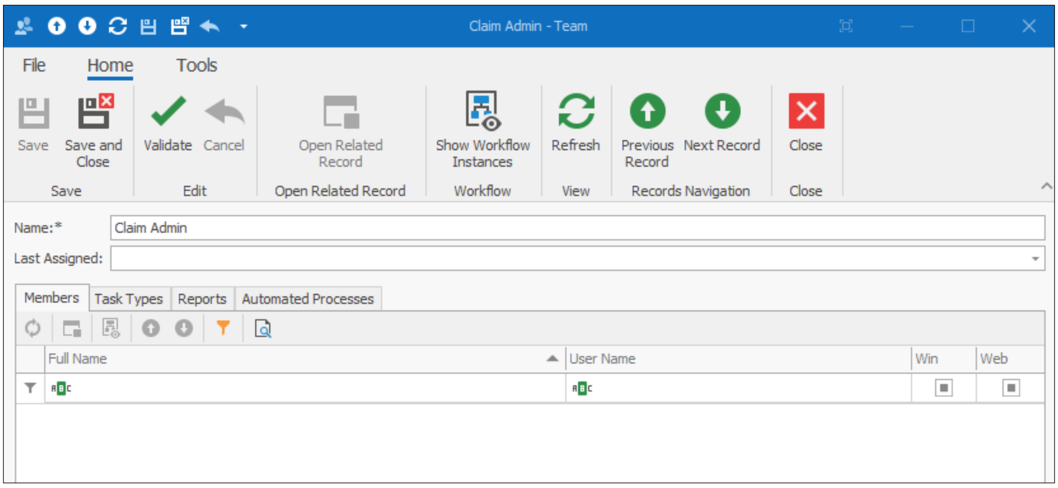
Please refer to Reset User Password section.

Team

Each user must be linked to a Team.

For each Team you can define which task types, task log types, reports and automated processes can be used by that specific Team.

Teams can also be used in workflows and importers to set up a round-robin to automatically assign tasks to a specific Team.

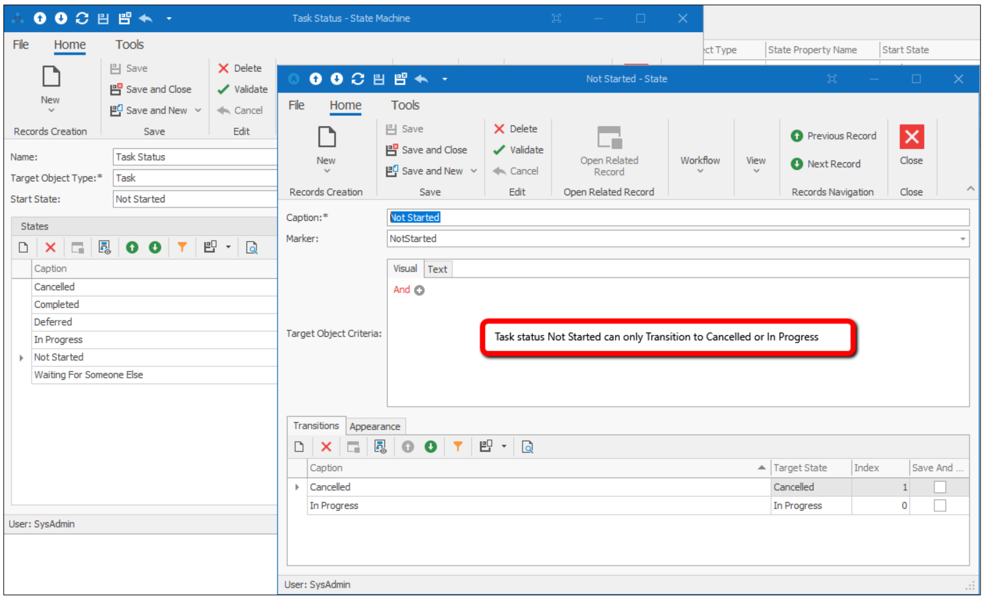


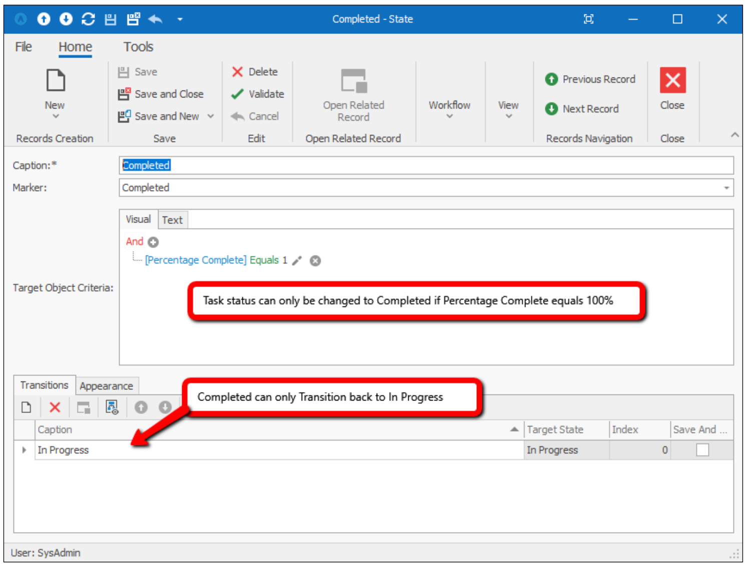
Members (users), task types and reports can be linked individually.

State Machine

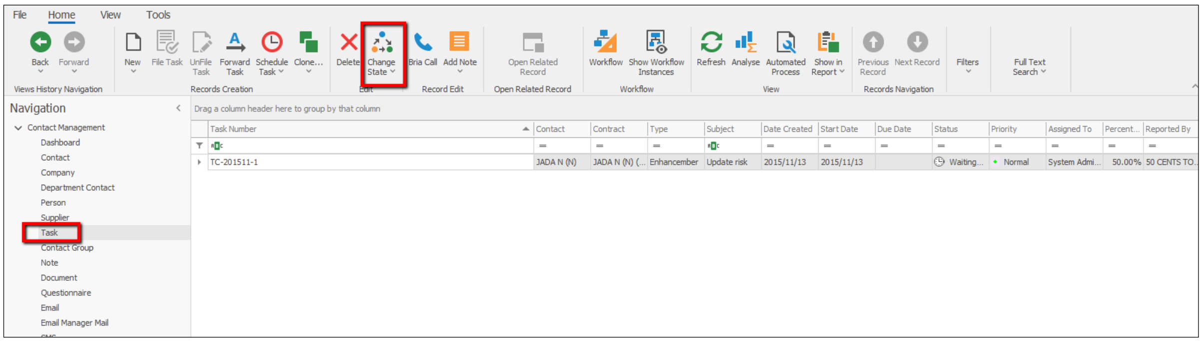
State Machine is used to apply specific control to system areas according to Business rules, i.e., Control the transition of Contract Statuses with build-in security controls.

This functionality also allows you to apply your own Appearance rules:





You will notice a new Action Icon on the System area on which the state machine was applied.



Task Type, Task log type & Text Template

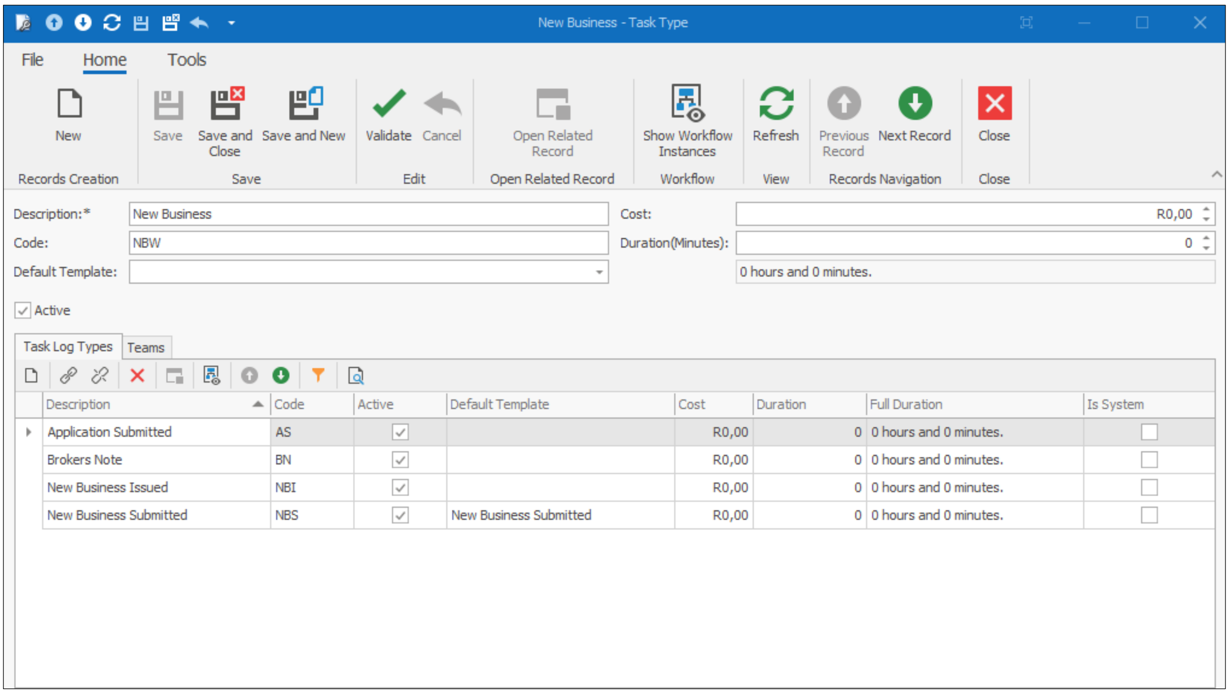
Task Management is a very prominent feature within the application and therefor the setup of task types, task log types and text templates are very important.

Task log types can be linked to a Task type ensuring that only the relevant task log types can be selected for that specific Task Type.

Assigning these Task Types to specific Teams creates a structure and uniformity within that Team.

Note: Various processes, workflows and Management reports are dependent on this setup.

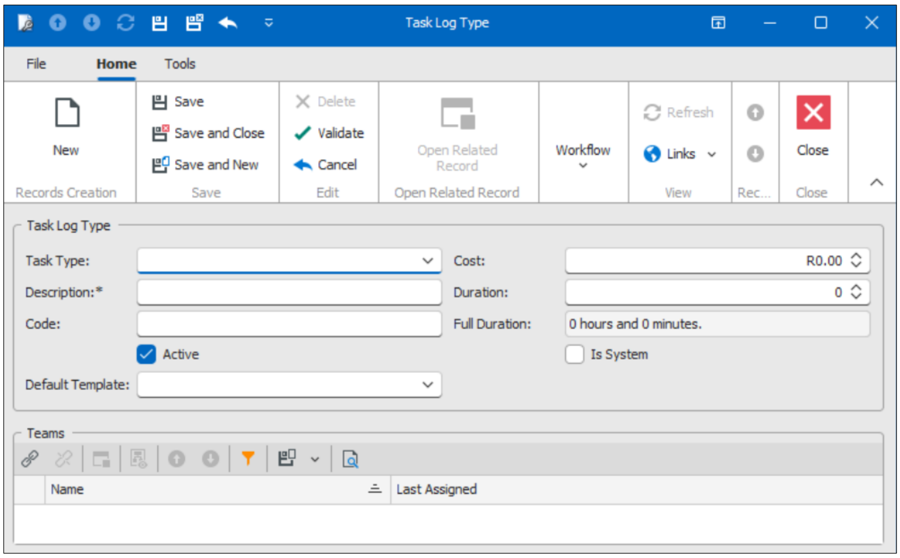
Task Type



Fieldname	Description	Required
Description	Create a unique short description to identify the type of task	✓
Code	Provide a code for the task type. This is optional	
Default template	A default template can be applied. Please refer to text template	
Cost	Allocate a unit cost for reporting purposes	
Duration	Duration is applied to determine time spent on a certain task. Also used in conjunction with Cost for reporting purposes	
Active	Select to make Task Type available	
Task Log Types	Link applicable task log types	
Teams	Assign task type to relevant teams	

Task Log Type

Task logs are used for all communication with regards to the task and are date and time stamped. It also shows the flow of actions on a Task.



1. Task log types can be independent from a task type. These task log types are then “universal” and available on any task type.
2. Task log types linked to a specific task type will only be available on that specific task type.
3. Task log type descriptions can be duplicated e.g., Confirmation of Cover but is then differentiated by a Task log code.

   Example:

   Task type: New Business: Assurance

   Task log type: Confirmation of cover

   Task log type code: ConfCovAss

   And

   Task type: New Business: Short term

   Task log type: Confirmation of cover

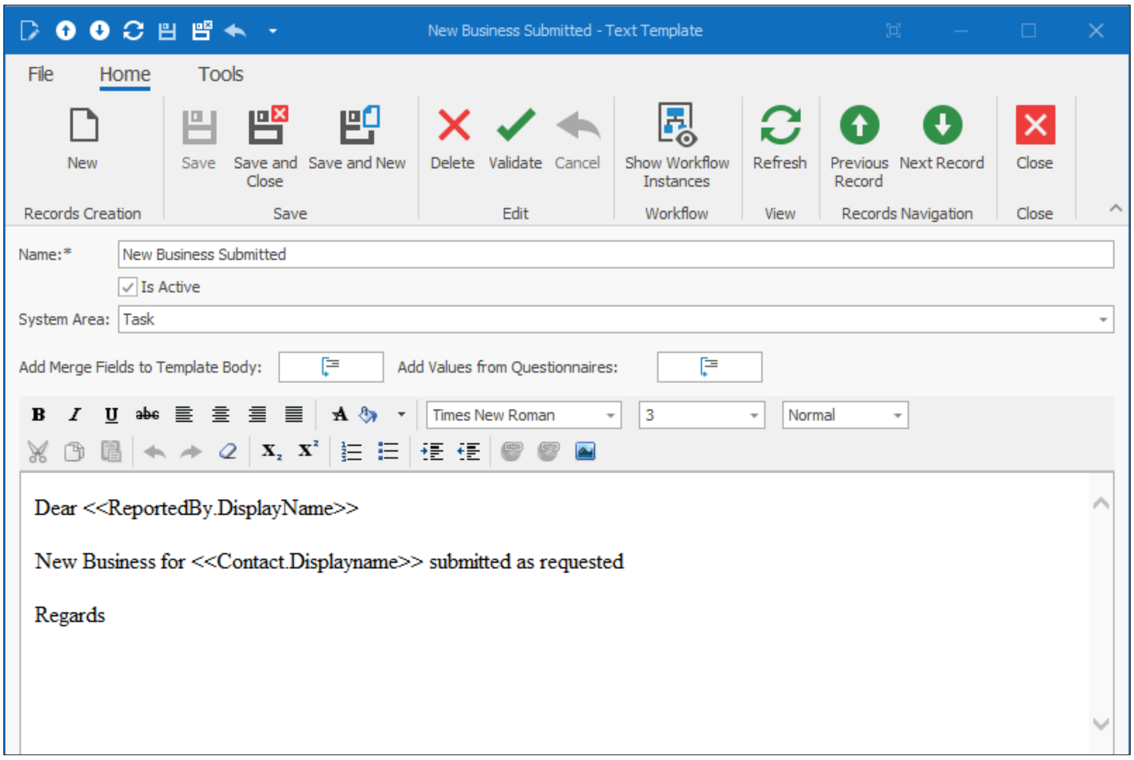
   Task log type code: ConfCovST

4. Task log types can be assigned to a specific Team and will then be available only to that Team.

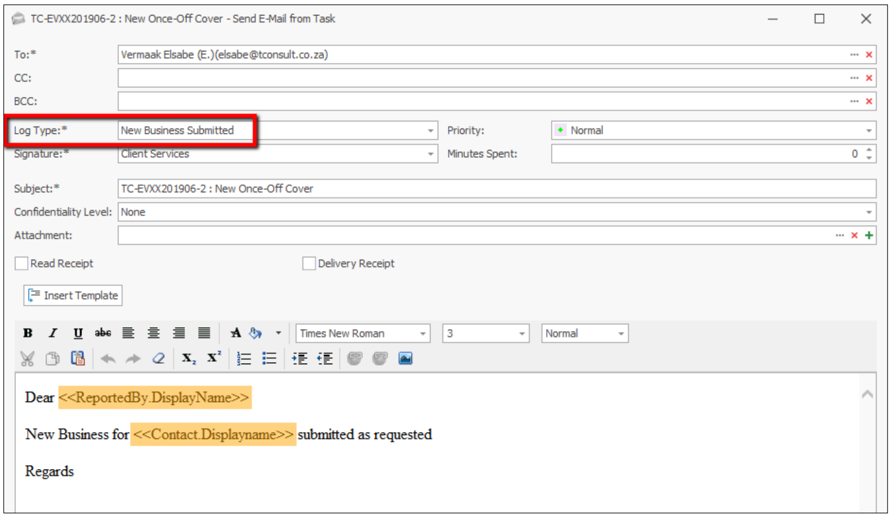
Text Templates

Text Templates assist in alleviating the admin burden of communication and/or to specify certain workflow steps that needs to be followed or even a form with fields that needs to be filled in.

Create a text template in the system area from which the template will be used. Make use of the Merge fields from that specific system area to auto fill the required information.

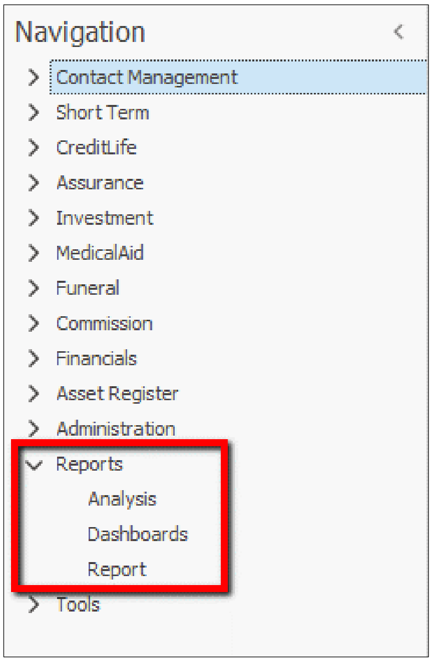


By assigning a default text template to a task or task log type, the body of that task or task log will be auto populated with the appropriate merged fields as set up.



Text Templates can be applied to both task and task log types.

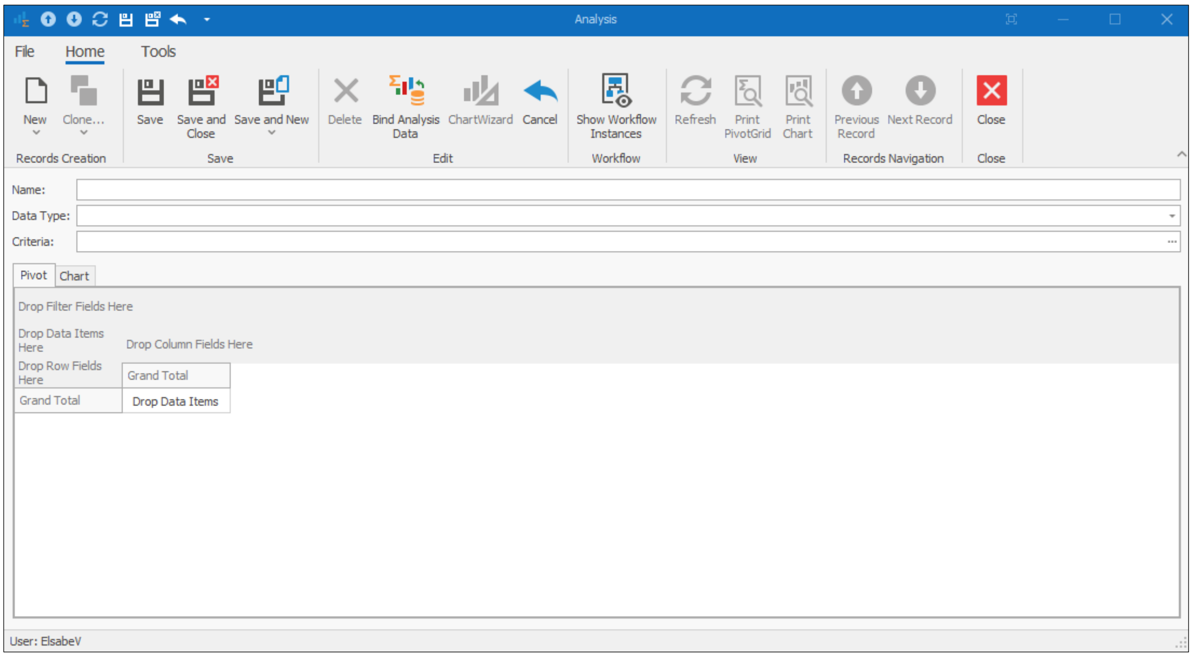
Reporting



Analysis

An analysis report can be created on any data captured in the application to effectively analyse your data. It also provides many charting options.

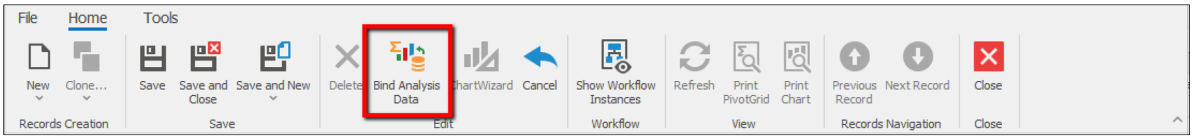
To create a new Analysis report, select New from the task bar:

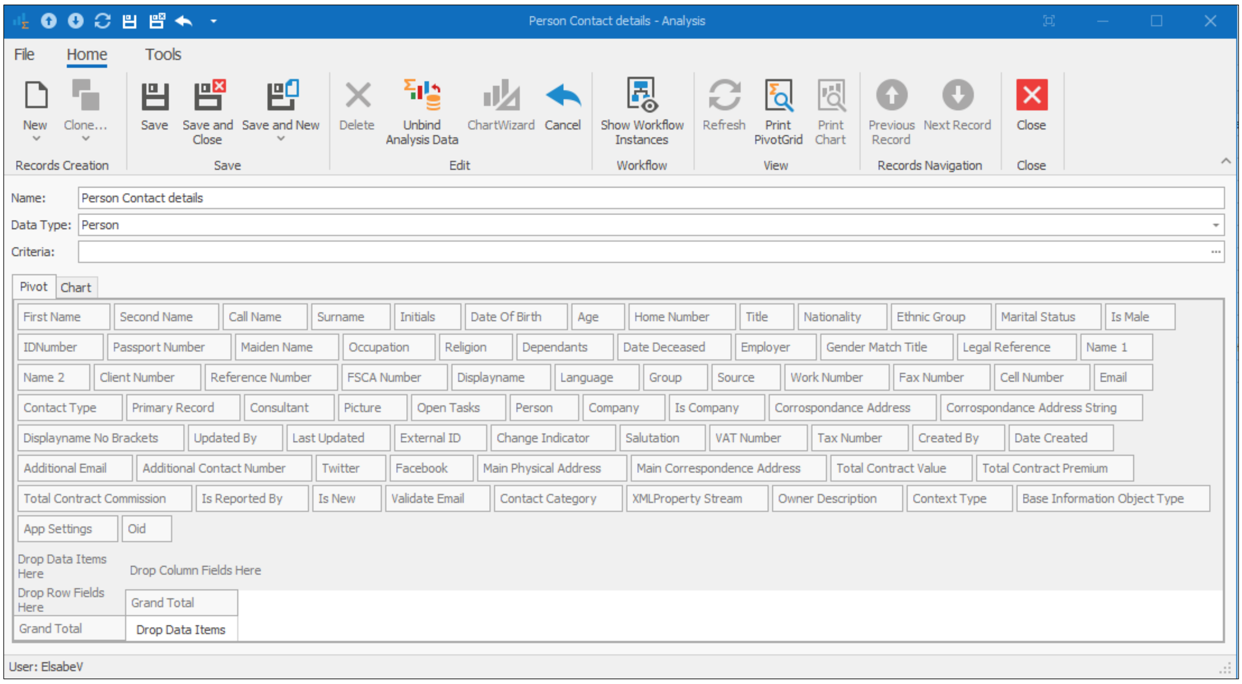


Provide a unique Name for the report.

Select a data type from the drop-down menu for your Analysis report. For this example, we are going to use 'Person' data type.

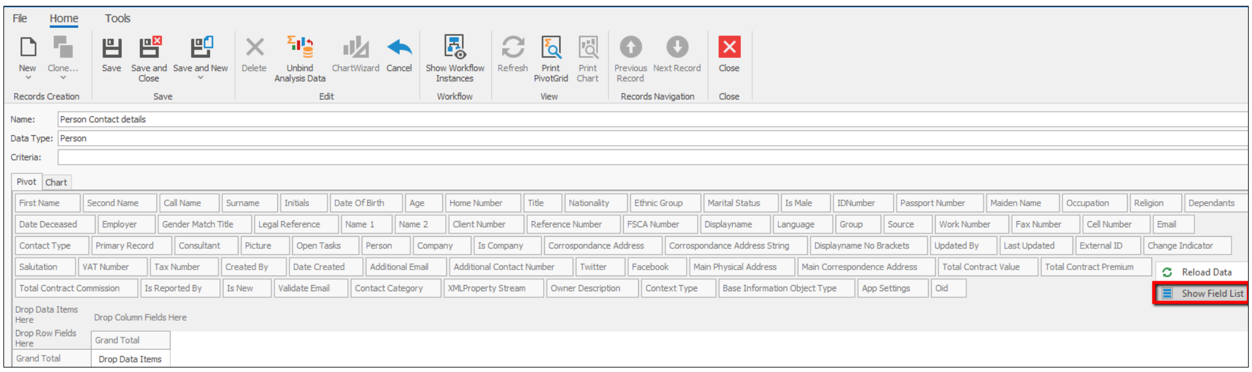
After selecting the data type, you need to 'Bind Analysis data' to display all fields in the application related to this data type.

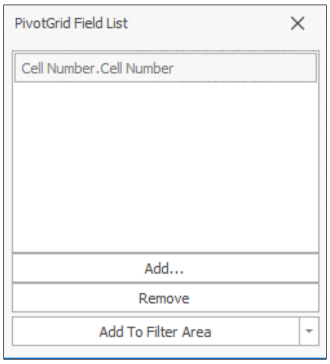


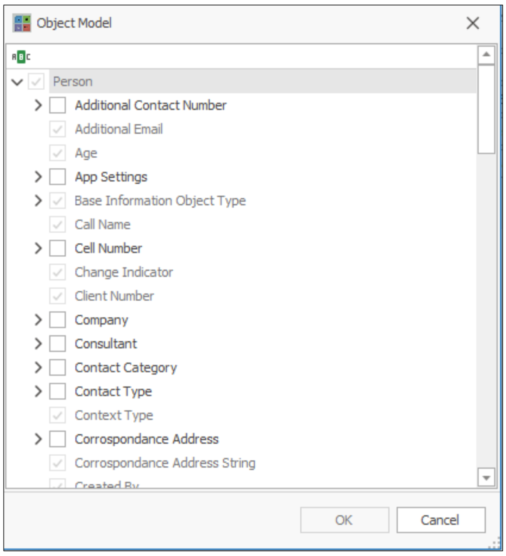


If there are specific data fields you want to report on which are not displayed, then you can add these extra fields using the Field list feature.

Right click anywhere in the field area and select 'Show Field list'. An additional screen will pop-up. Click 'Add' and then you can select the required fields to be added from the Object Model:

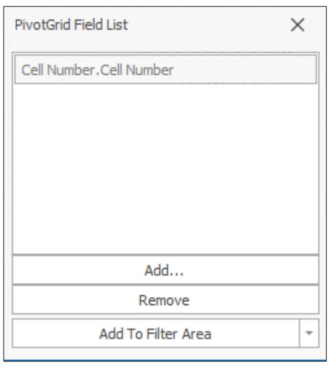


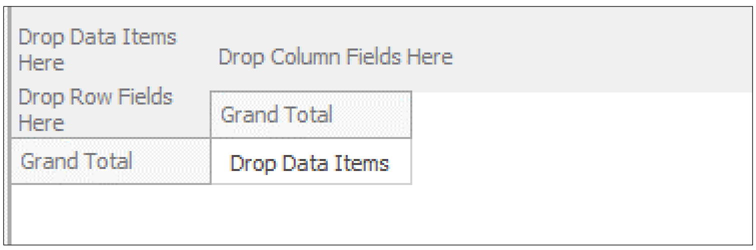


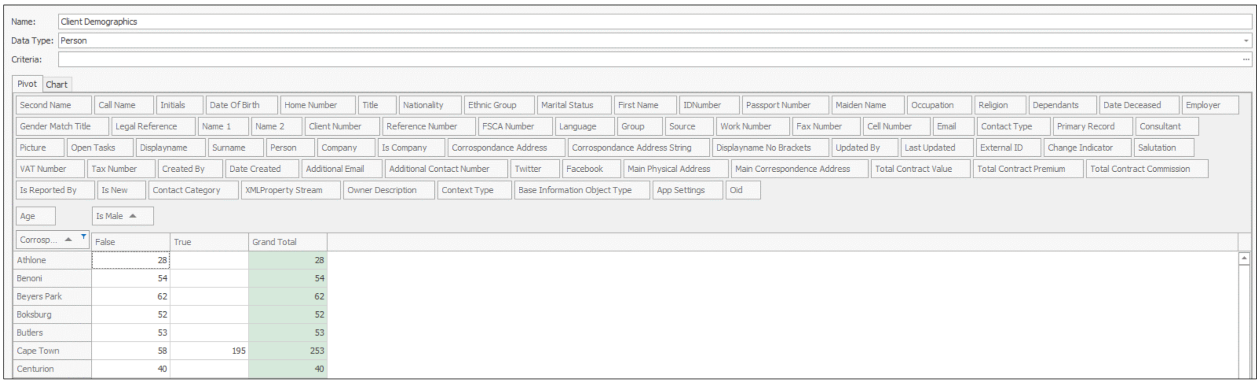


Note that some of the data fields are greyed out. These data fields are already displayed in the field area of the analysis.

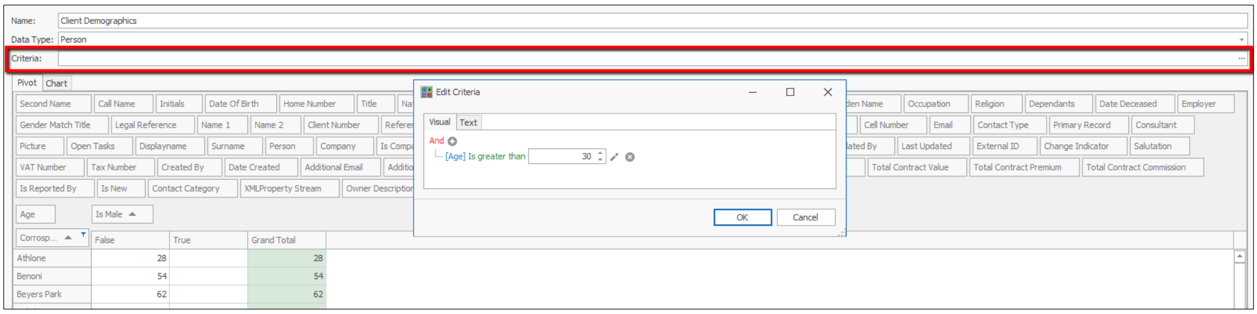
After you have selected all the required data fields to add, they will be displayed in the pop-up screen from where you can drag-and-drop each field onto your analysis report to the column-, row- or data areas of the report.



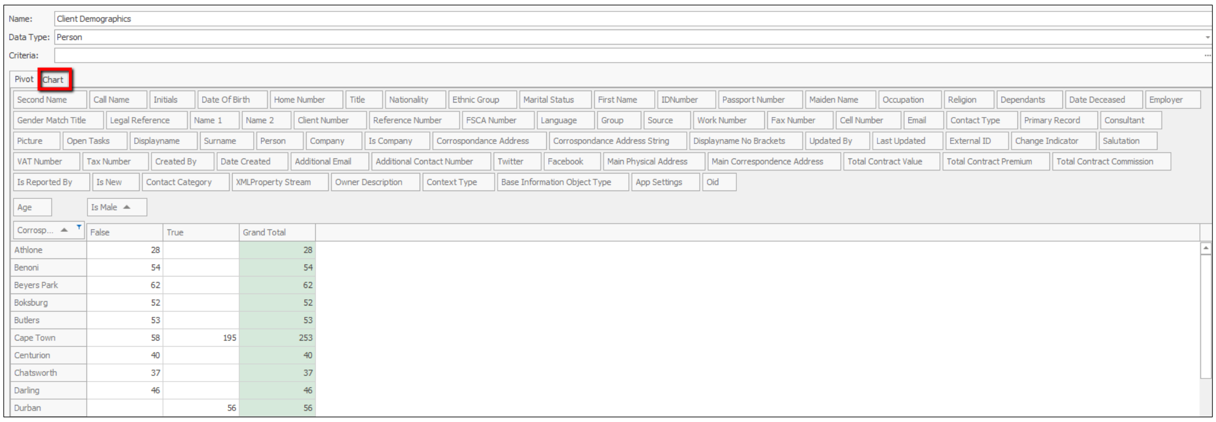


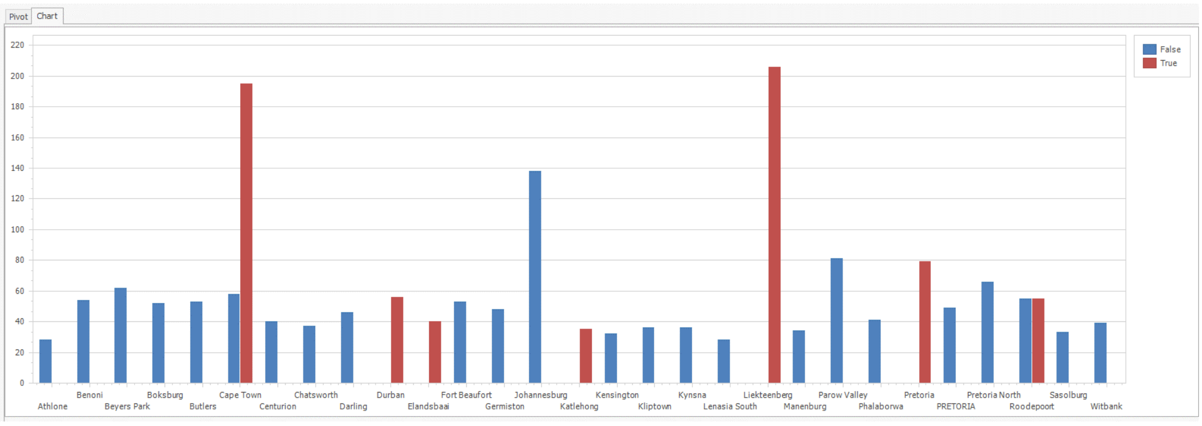


The above analysis report shows client demographics per city. You can use the criteria field to narrow the focus of your analysis and apply filters to your report data:

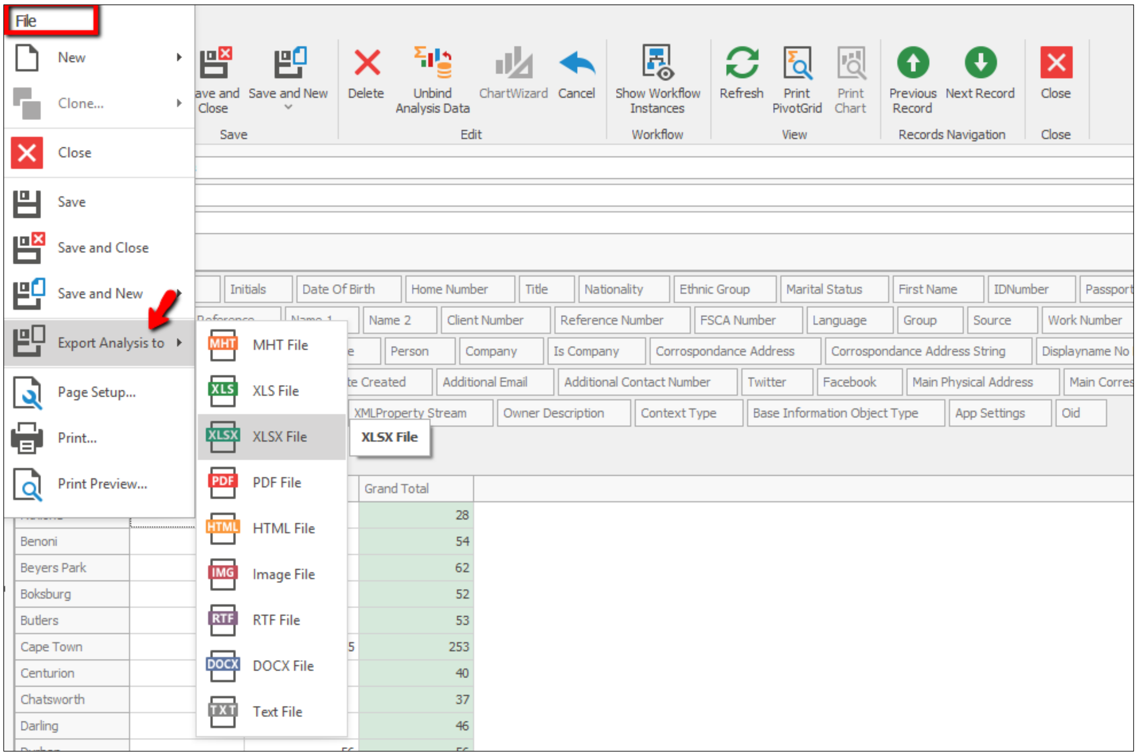


Every analysis report provides the option to create effective charts based on the data in the analysis:

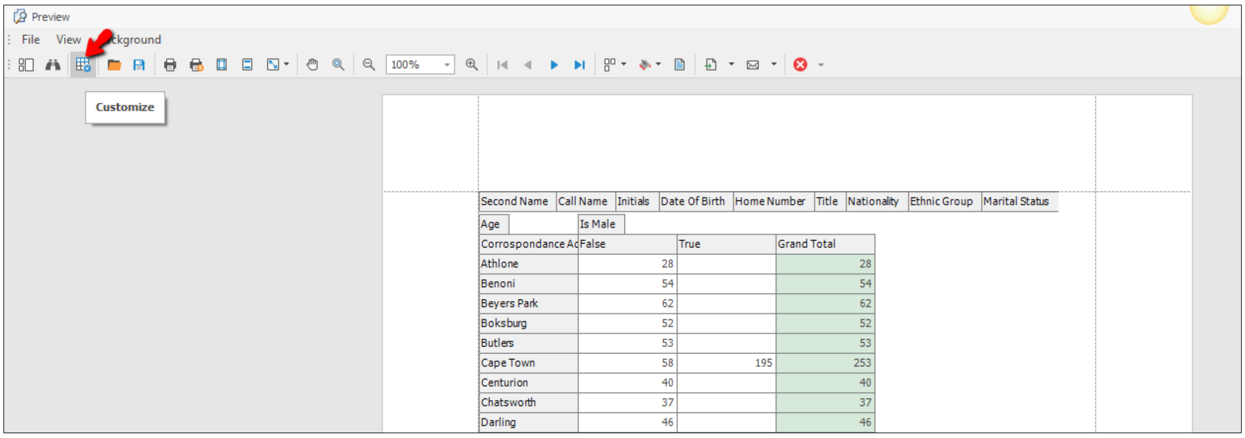




Your analysis report can be exported in various formats:



Customise the print layout of an analysis report by changing the options for Headers, Lines and merged fields:



Notice the difference after applying customisation to the analysis report layout:

Corrospondance Ad	False	True	Grand Total
Athlone	28		28
Benoni	54		54
Beyers Park	62		62
Boksburg	52		52
Butlers	53		53
Cape Town	58	195	253
Centurion	40		40
Chatsworth	37		37
Darling	46		46
Durban		56	56
Elandsbaai		40	40
Fort Beaufort	53		53
Germiston	48		48
Johannesburg	138		138
Katlehong		35	35
Kensington	32		32
Kliptown	36		36
Kynsna	36		36
Lenasia South	28		28
Liekteenberg		206	206

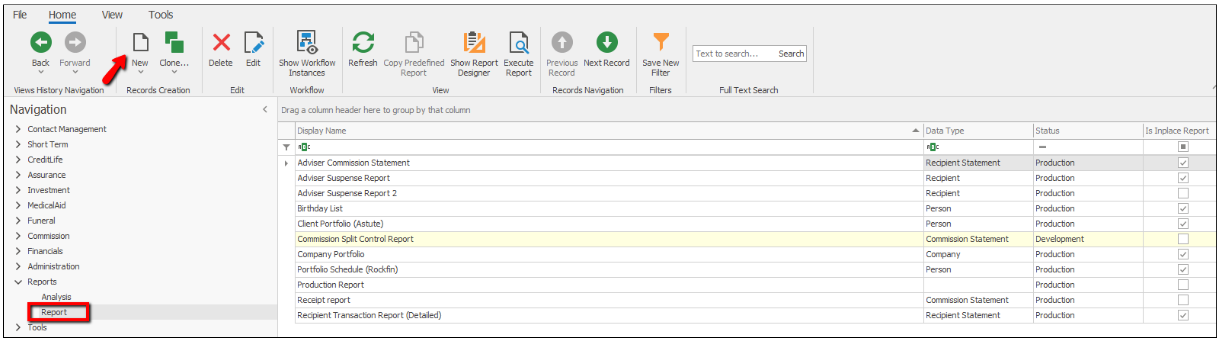
Dashboards

Dashboards provide you with a single view of your business data and overall performance.

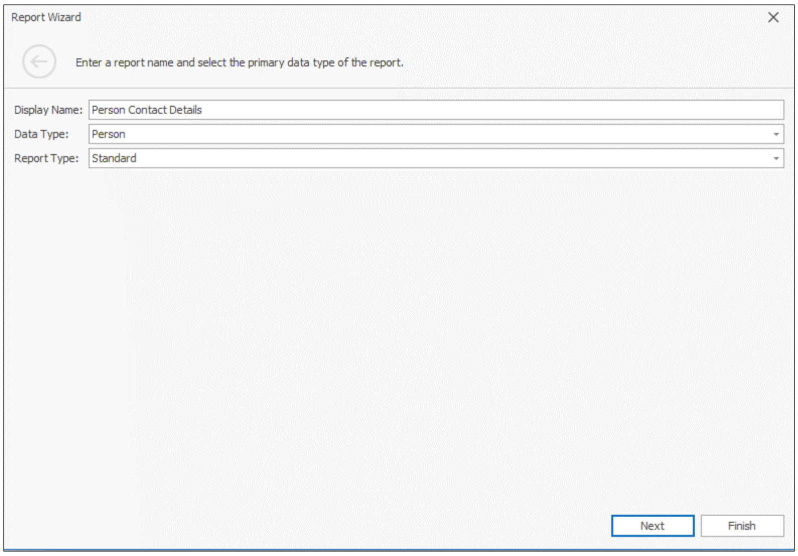
Please contact us with your Dashboard requirements.

Standard Report

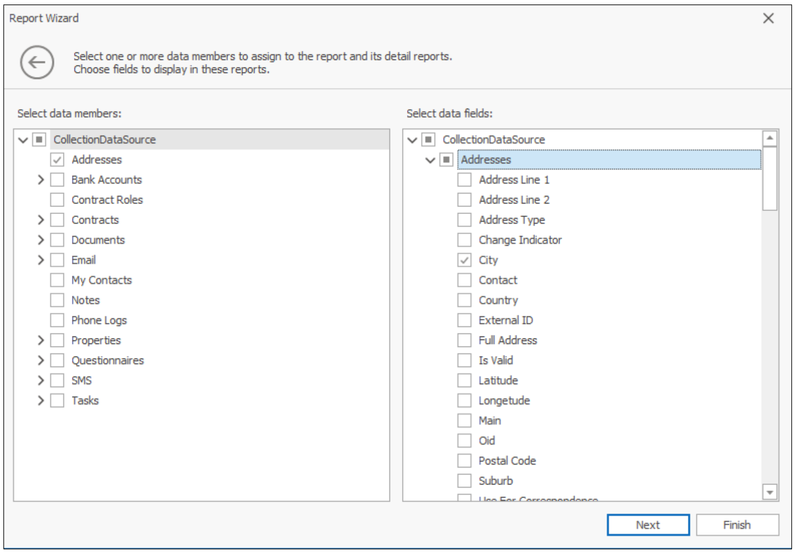
A standard report can be created and then be generated as an 'In place report' at any given time. Standard reports can also be used in Automated processes.



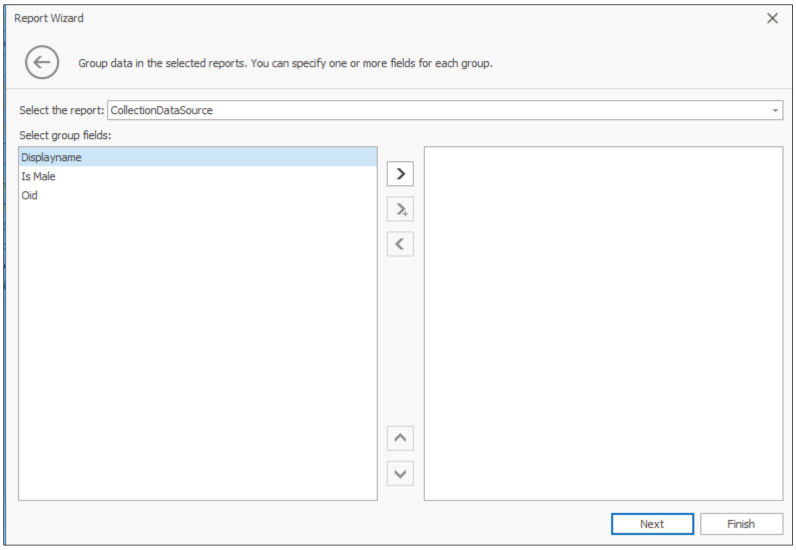
Create a New report. The Report Wizard will take you through a process similar to the Analysis tool:



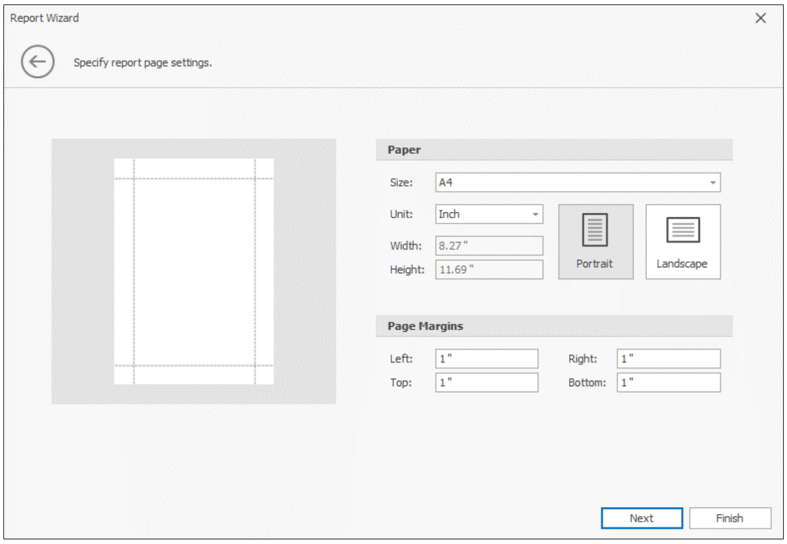
Select the fields you want to display in the report:



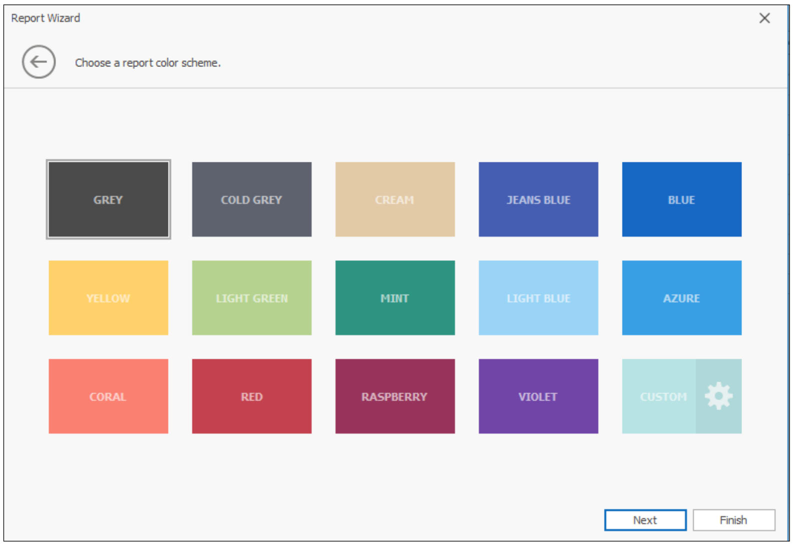
You have the option to add grouping to your report:



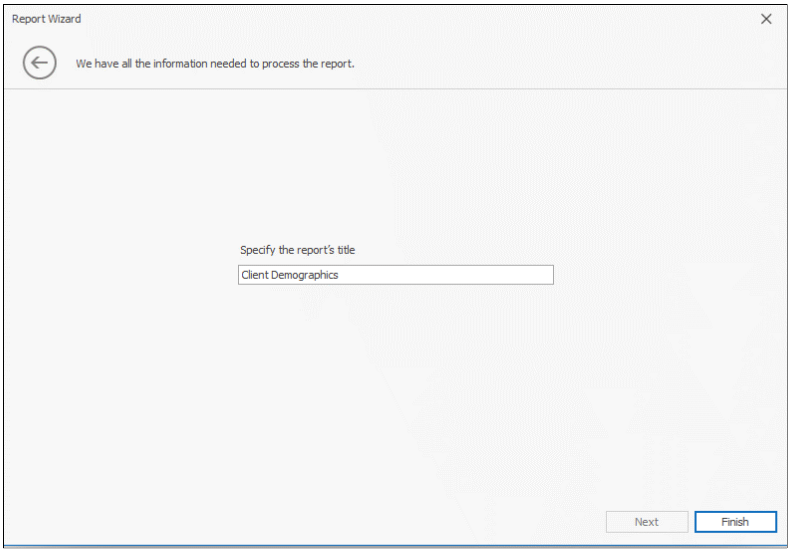
Select the layout of your report:



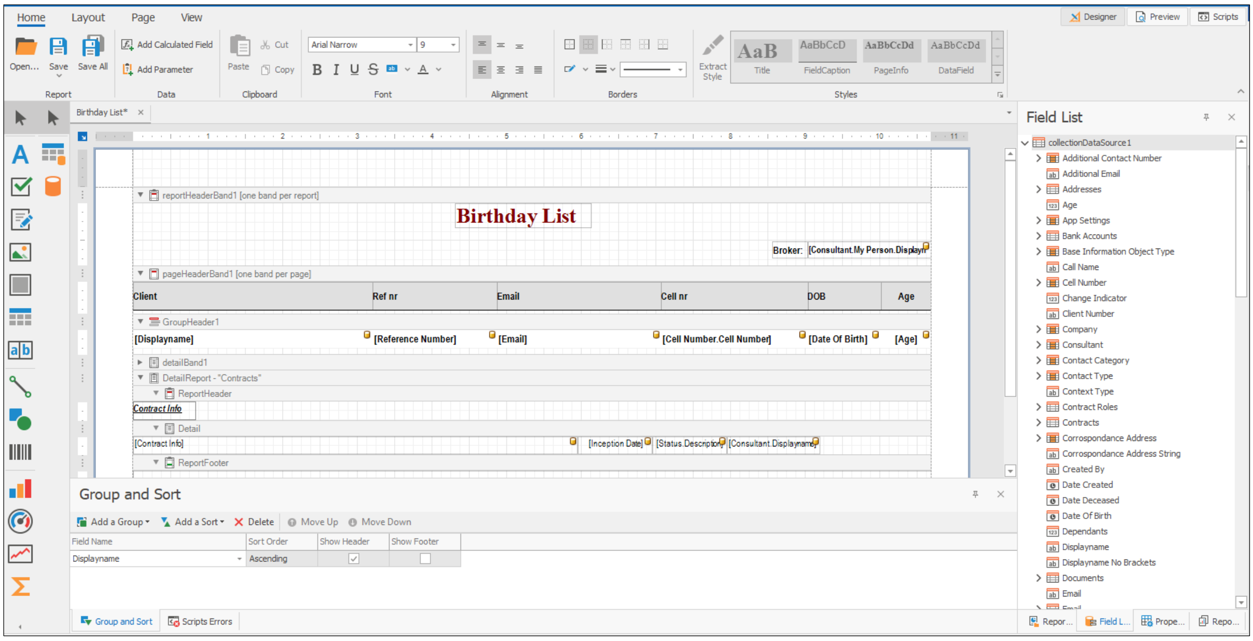
Select the colour scheme you prefer for your report:



Create a heading for your report:

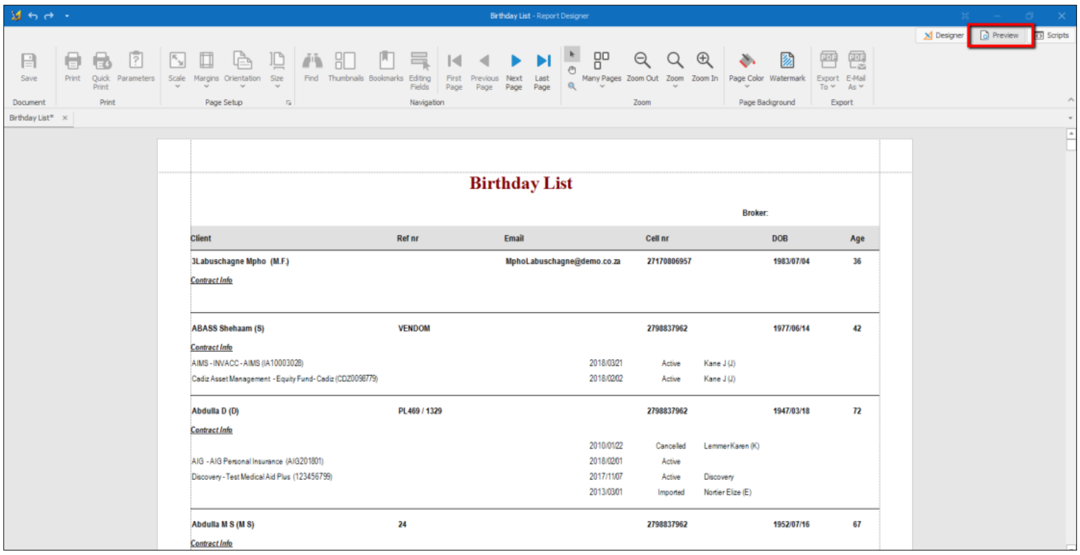


The report is now generated with the criteria selected in the wizard.



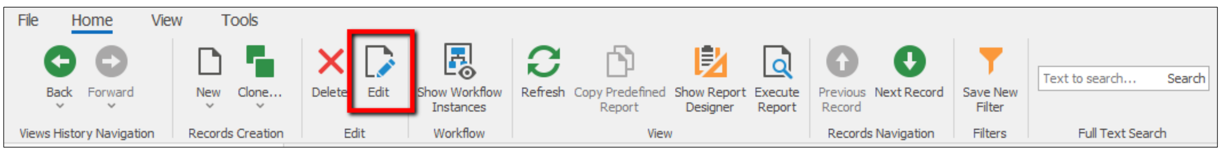
You can add more detail to your report or improve the 'look' of your report, e.g., Logo, colour coding etc.

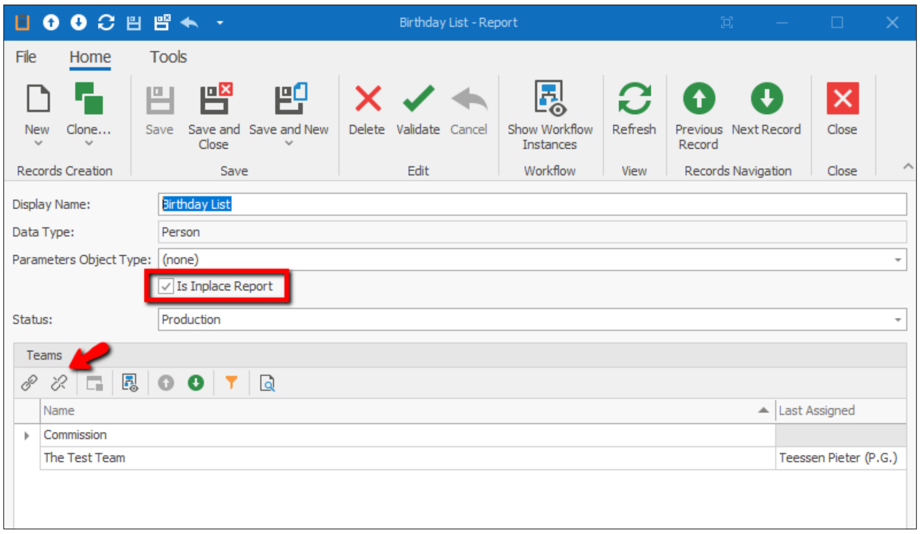
To view your final report, click on Print Preview.



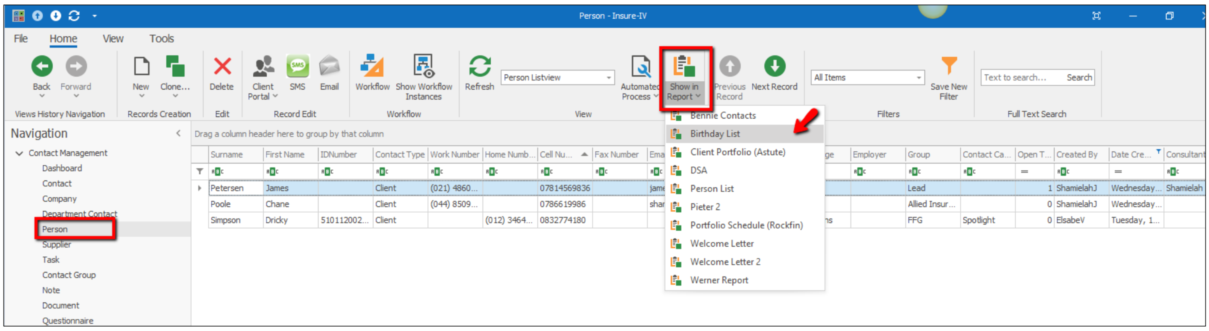
To make this report available as an 'In Place report', click the 'Edit' icon on the toolbar and select 'Is Inplace Report'. The report will be available on specific data views based on the selected data type.

Link the relevant Group/s to which this report applies.





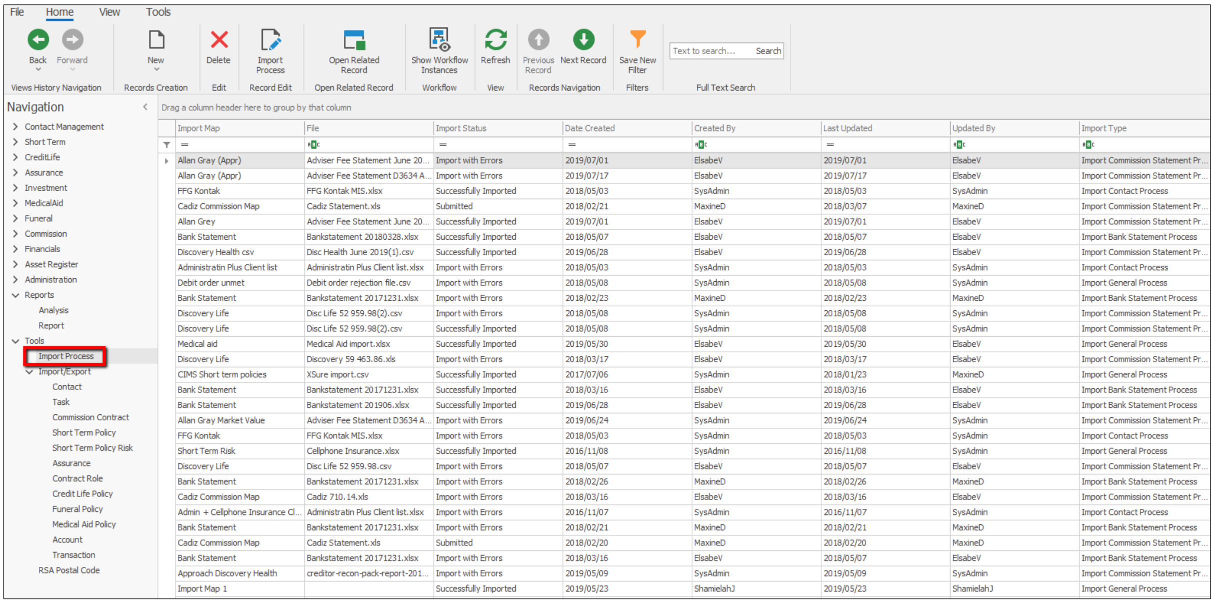
You will now be able to generate this report directly from the Person screen on Contact Management.

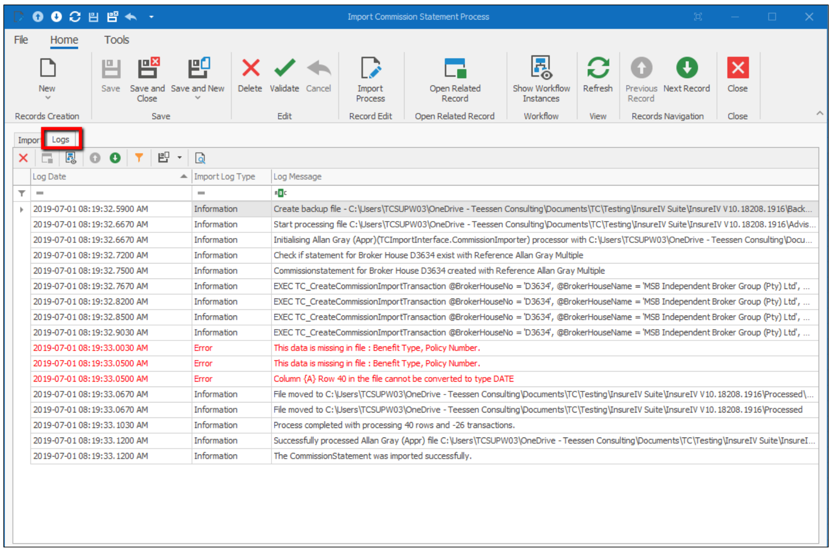


Tools

Import Process

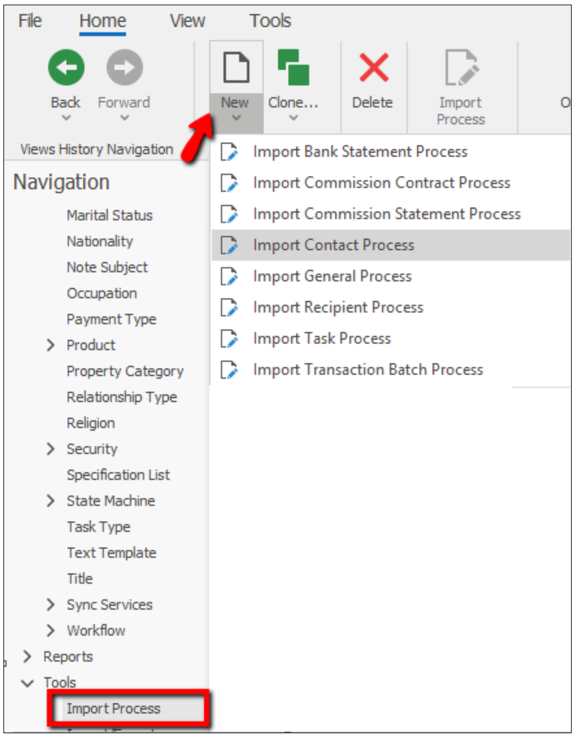
Import Process list view will display all imports done in the application with a detailed log with possible errors and explanation thereof.



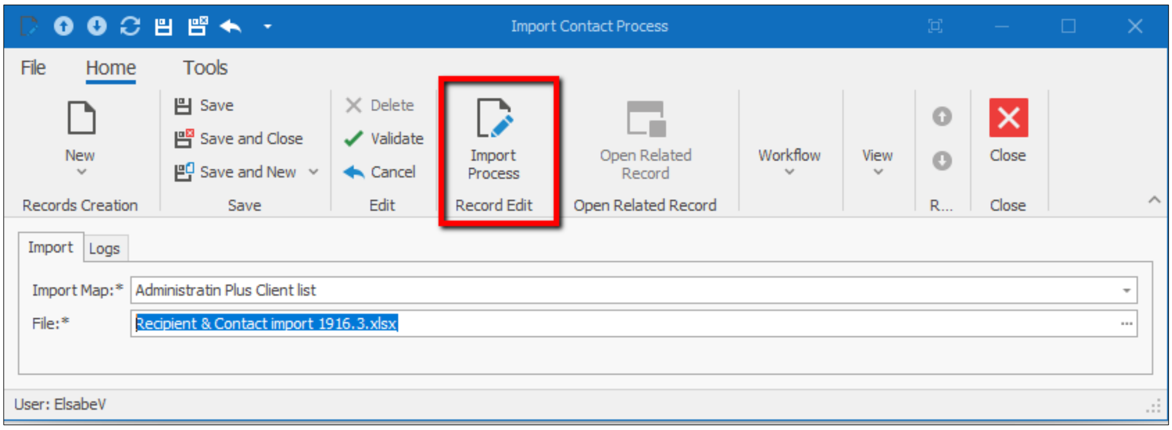


New imports into the Temporary Tables are also done from this view.

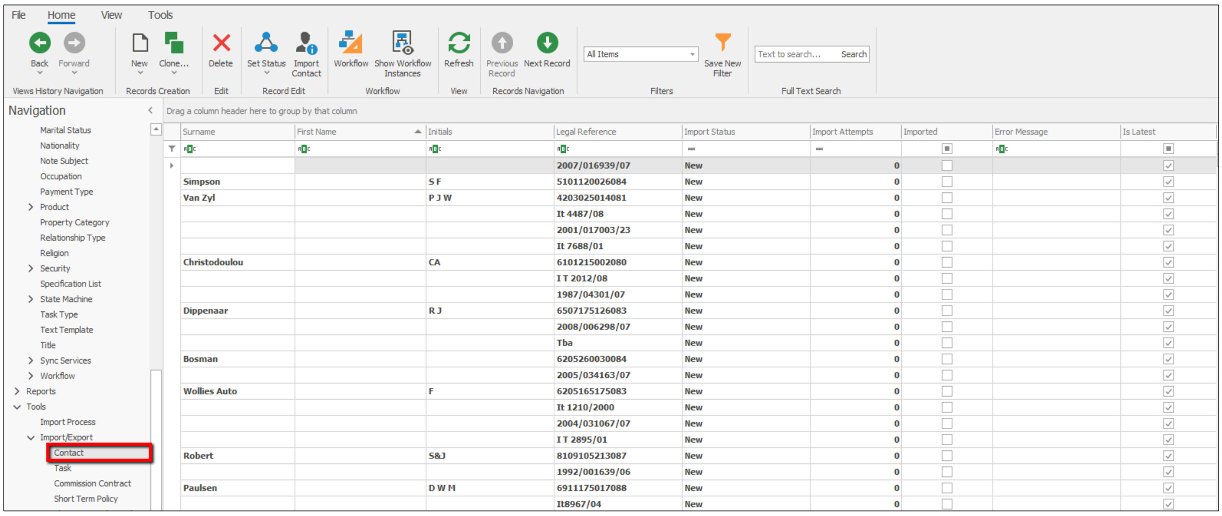
Select Import process and the relevant importer to import your data, e.g., Import Contact Process:



Select the appropriate map and file to be imported. Save your record and use Import Process action to import the data to the temp tables.

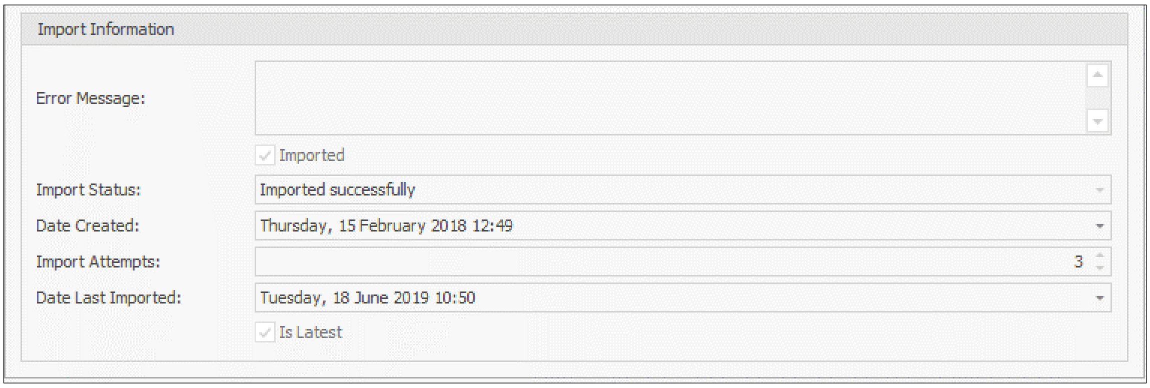


All the data have now been imported into the temp tables from where it can be altered, imported individually or in bulk.

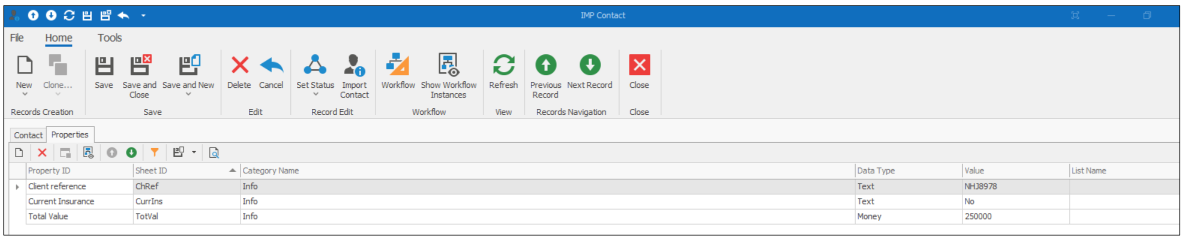


Each record will show Import information to indicate possible discrepancies in the data to be amended or completed before second attempt of import.

Data can be imported multiple times until it is successful.



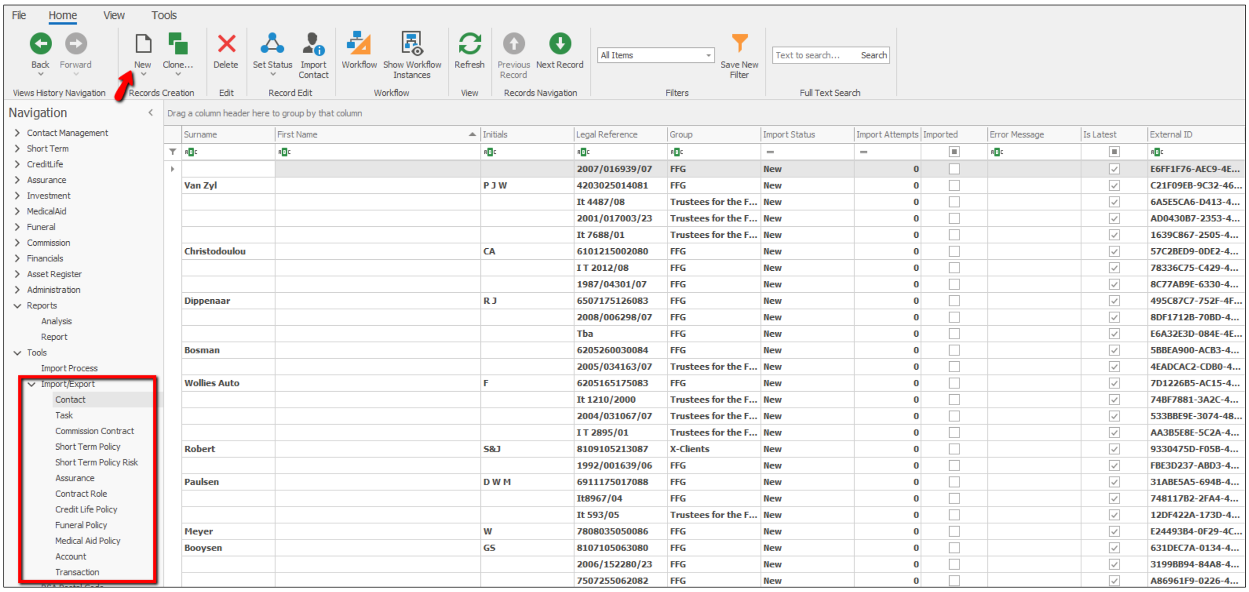
Data can be imported into the temp tables from 3rd party applications using Questionnaires and Property sheets. Specific procedures and/or workflows will be used to import this data into your database.



Please discuss your requirements with our Consulting team.

Import / Export Temporary tables

View, amend or capture new info in the Temporary tables before importing it into the database.



Short term

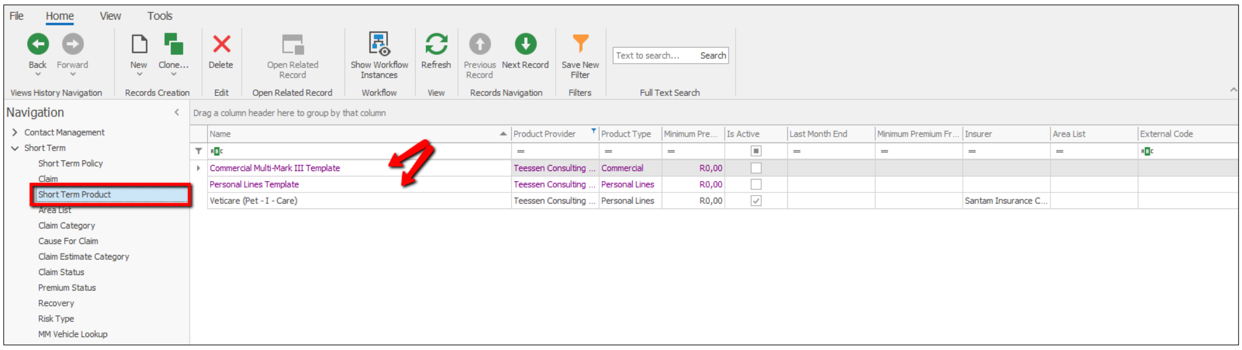
A product must be set up in the application before any policies can be captured.

The amount of information captured on a product will determine on which level (Tier 1, 2 or 3) a policy will be administered.

Only basic product information is needed for a Tier 1 policy whereas full information will be required for both Tier 2 and 3 policies.

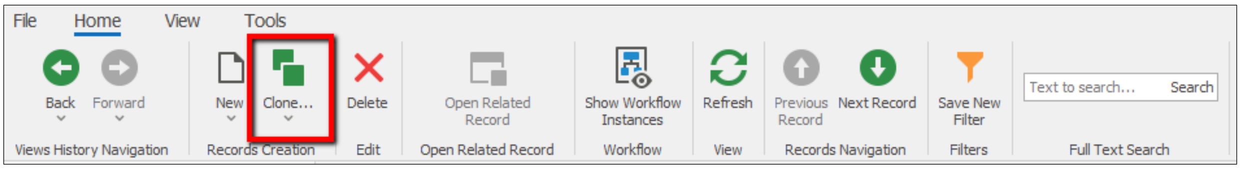
Short term Product

You will find both a Commercial Multi-Mark III Template and a Personal Lines Template already available in the application:



For ease of creating a new Short Term Product, these templates can be cloned (copied) and modified for your own purposes.

1. Open either one of the templates and click on the Clone button on the top left of the screen:

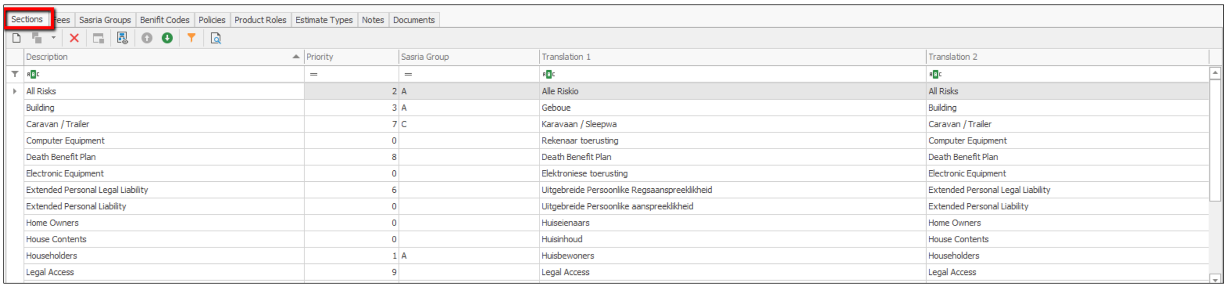


2. Rename the template to your required Product and Save
3. You are now setting up your own Product and need to enter the following General Information:

Fieldname	Description	Required
Name	Name of the Product you are creating	✔
Product Provider	Select the Provider details from your Contact list	✔
Description	Simplified description of the Product	
Product Type	Select the product type from the drop-down menu	
Minimum Premium	Capture a minimum premium value (if applicable)	
Minimum Premium Frequency	Field will become available if minimum premium was captured. Selection Monthly / Annually	
Insurer	Select Insurer details from your Contact list	
External Scheme Code	Enter your external scheme code (if applicable)	
Discount Rate	Enter discount rate	
Area List	Select Area List from drop-down menu or create new if not existing	
External Code	Capture external code if applicable	

Start Date	Enter date from when this product is active
End Date	Enter End date if Product is no longer in use
Commission Calculated Before VAT	Select when applicable
Is Active	Product will be set as active when start date is entered and made inactive by default when end date is entered
Compliance Change Tracking	Compliance Change Tracking will prompt you to enter details of changes made to any policy
Enable Collection	Transaction history and pro-rata premiums will be generated when selected. All changes on Risk as well as policy must be authorized before collection of premiums. (Tier 2 & 3)
Is Vatable	Select if Vat is applicable for manual commission transactions
Validate Contract Consultant	Applicable to Commission processing. The application will warn the Commission Administrator if the Consultant to receive commission is different from the Consultant linked to the Policy.

4. Create the content of your product



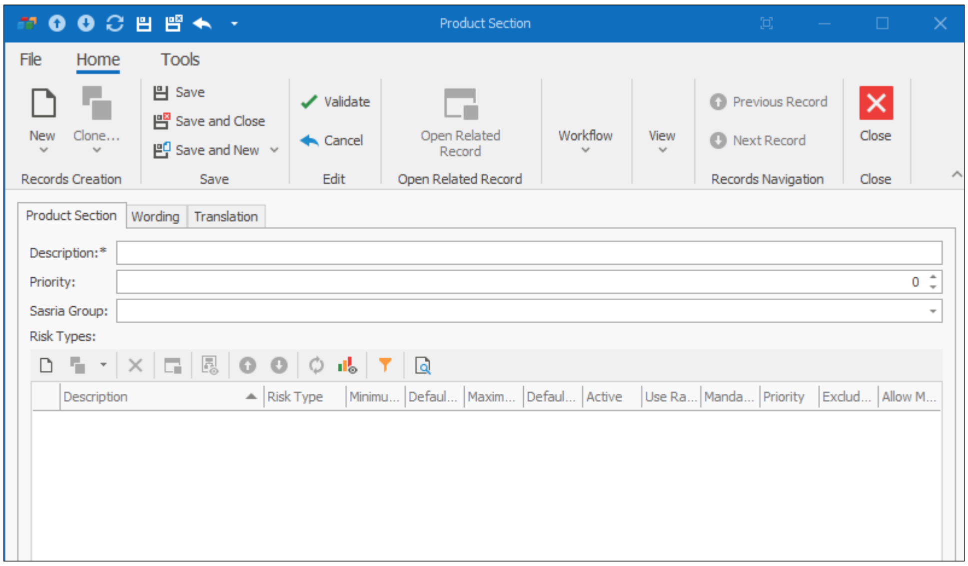
Sections

The basic sections for Personal Lines policies, as well as for Commercial Lines, have already been created on the template.

Customize your product using the pre-set sections as well as adding or deleting sections to your requirement.

The set-up will depend on the level of detail you require (Tier 1 – 3).

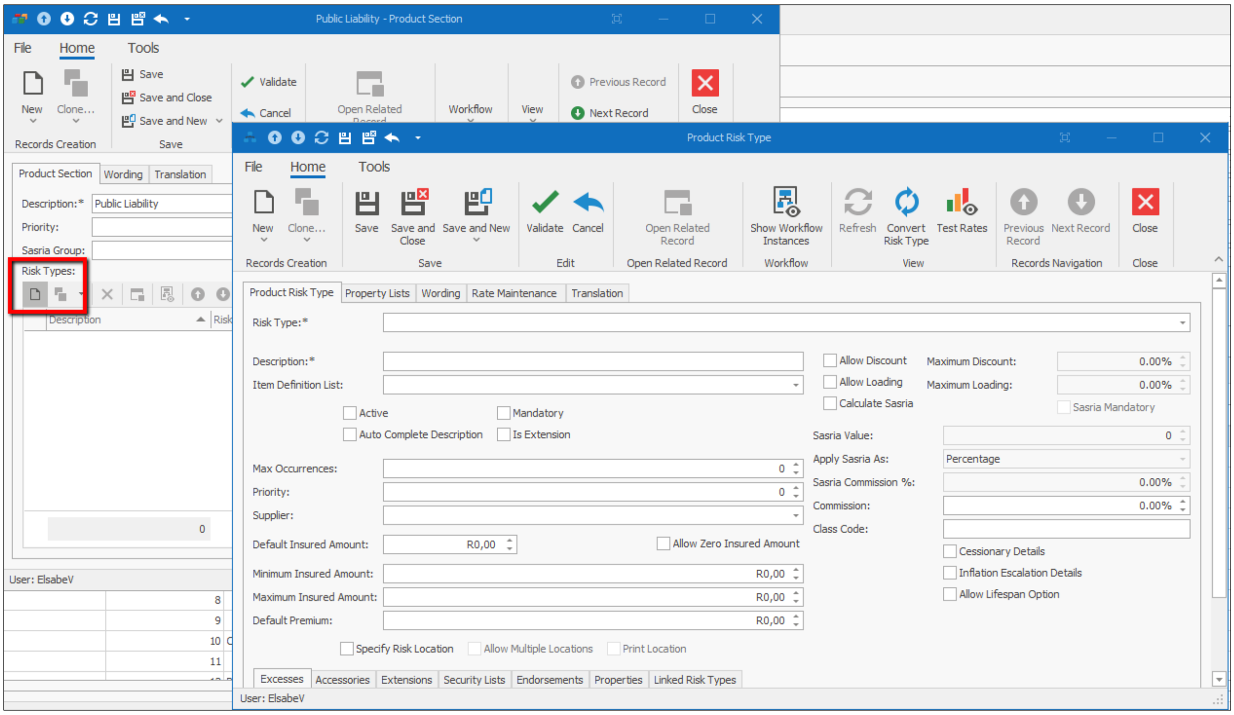
Create a new Section by selecting the ‘New’ button:



Description - e.g. All Risks
Priority - Specify the sequence of your Sections
Sasria Group - Link section to appropriate Sasria Group as defined on Short Term Product View (if applicable)

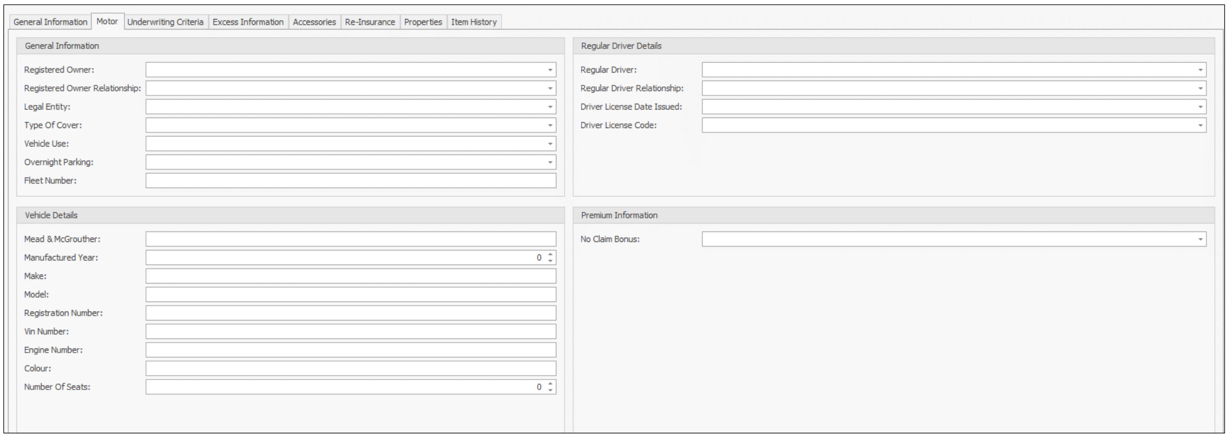
Risk type

Create Risk Types with full detail i.e., Excess structure, Accessories etc. applicable to this Section:



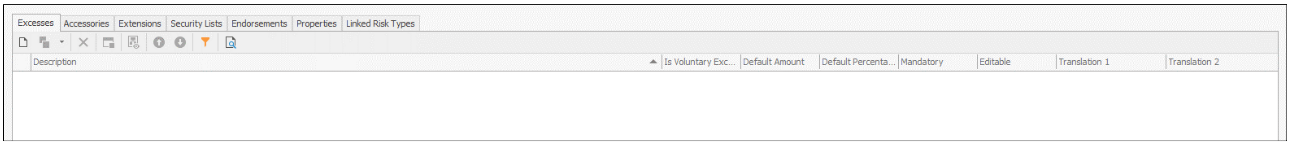
Fieldname	Description	Required
Risk Type	Choose from various templates created with more specific detail relevant to a Risk Type	
Description	Auto populated from Risk Type description, but can be changed manually	✔
Item Definition List	Various specification lists have already been set-up for selection or create a new unique list to choose from.	
Active	Must be selected in order to capture details.	
Auto Complete Description	As the description of the Risk Type and the description of the item may differ, the application allows you to enter a different value in this field. By selecting this option, the application will default to Risk Type Description entered.	
Mandatory	Select when applicable	
Is Extension	Select when applicable	
Max Occurrences	Enter maximum occurrences as per underwriting criteria	
Priority	Prioritise the sequence in which the Risk Types will display	
Supplier	Select supplier where applicable	
Default Insured Amount	Enter when applicable	
Minimum Insured Amount	Enter when applicable as per underwriting criteria	
Allow Zero Insured Amount	Select when insured amount does not apply to this risk	
Maximum Insured Amount	Enter when applicable as per underwriting criteria	
Default Premium	Enter when applicable	
Allow Discount	Select when applicable to enter the Maximum Discount value percentage	
Allow Loading	Select when applicable to enter the Maximum Loading percentage	
Calculate Sasria	Select when applicable to activate Sasria fields	
Sasria Mandatory	Select when applicable	
Sasria Value	Enter value	
Apply Sasria as	Select either percentage or cost	
Sasria Commission %	Enter value	
Commission	Enter commission value as per product specifications	
Class Code	Enter when applicable	
Cessionary Details	Select when applicable	
Inflation Escalation Details	Select when applicable	
Allow Lifespan Options	Select when applicable	
Specify Risk Location	Select when you require the risk address to be selected on this specific risk	
Allow Multiple location	Select when applicable	
Print Location	When selected, the risk address will appear on the policy schedule	

Example of risk template (Motor view):



To complete the Risk Type details, you need to capture the complete Risk structure

- Excess structure
- Accessories (when applicable)
- Extensions
- Security List
- Endorsements
- Properties (when applicable)
- Linked Risk Types (when applicable)



To capture this information, select ‘New’ on each tab individually, complete the relevant information which is self-explanatory

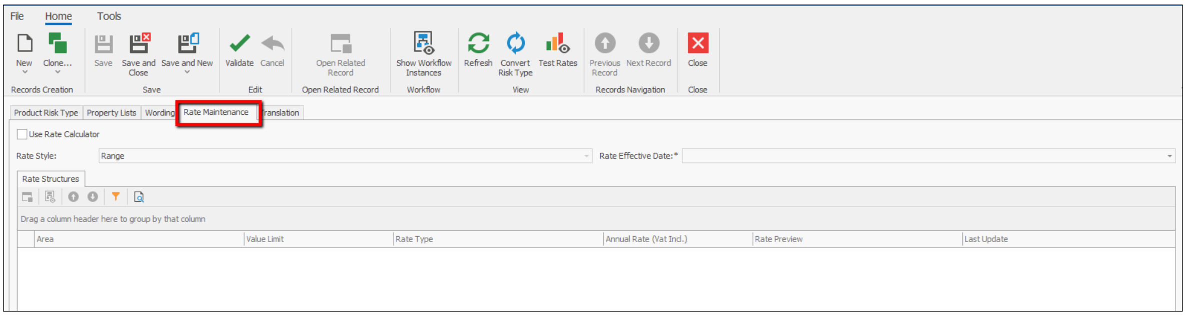
please note that each view has a Wording and Translation tab where you need to capture the specific wording and translation of that wording applicable to that specific view

Product Linked Risk:

The linked risk types are used for those risks where another risk is insured seperately, but is part of the original risk item. An example of this is a watercraft (motorboat) where the engins are insured seperately, but are also part of the craft. Each engin is therefore a risk in its own right.

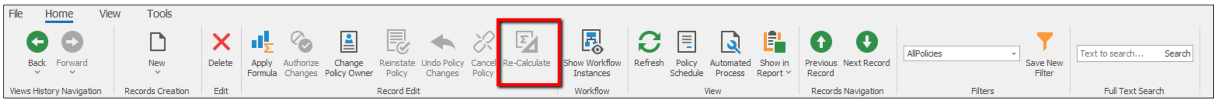
Rate Maintenance

Complete the Rate structure applicable to your Risk Type:



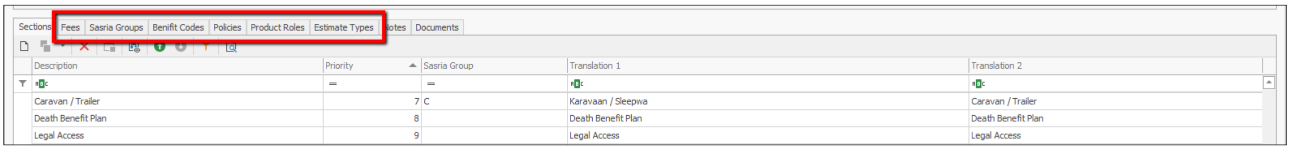
Risk premium will automatically be calculated once the rate structure is active.

You will notice a new icon on the policy view when the rate has been changed – 'Re-Calculate' – which will recalculate all risk premiums to the new rate selected.



Use the 'Save' and 'New' options to capture the next Risk Type applicable to your Product and repeat the same procedure until the Product layout is complete.

Once all Sections and Risk Types have been created, the Fee structure and Claims Estimate types can be defined and then policies can be captured against this product.



Benefit Codes

Each product has a unique benefit code which is used by the Commissions module for processing commission, e.g., Santam Multiplex etc.

Commission processing will fail if this is not specified.

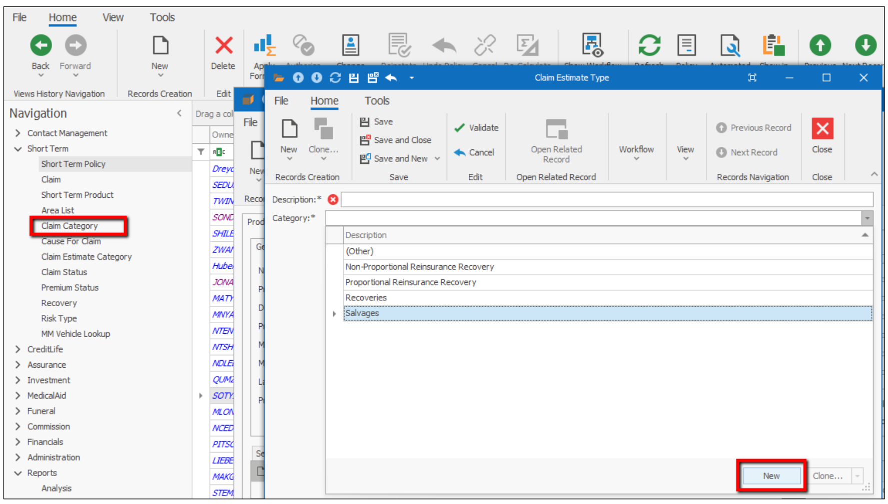
Product Roles

Each type of policy has its own unique product role(s) to be used when another person or entity has an interest on the specific policy, e.g., Short term product role may be Co-Insured. Please refer to the TC Insure-IV Suite User Guide > Contract Roles section.

Estimate Types

Claim Estimate Types are compulsory during the Claims process and won't be available unless specified on the product.

Claims Category is set up on the Claim Estimate type screen or the Navigation Panel:



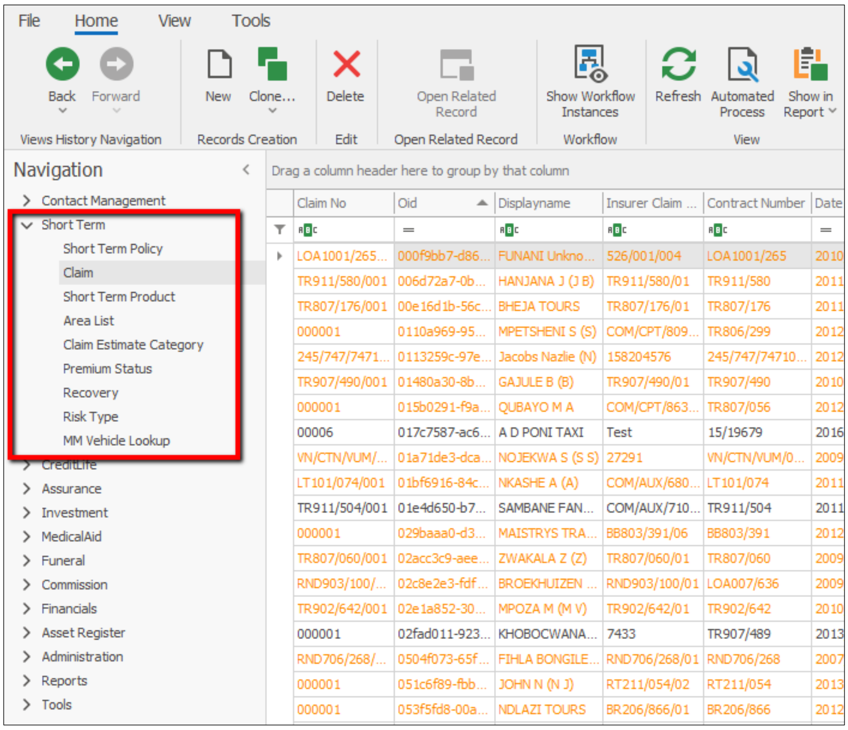
All fields captured during product creation will be available on the policy view as drop-down lists or selections.

You may want to attach the master policy to your documents to be available as reference when capturing a policy or registering a claim.

Short term Claims

Required drop-down menus for registering a claim must be set up before any claim can be registered

Refer to Claim for Category, Cause of Claim and claim status drop-down menus.



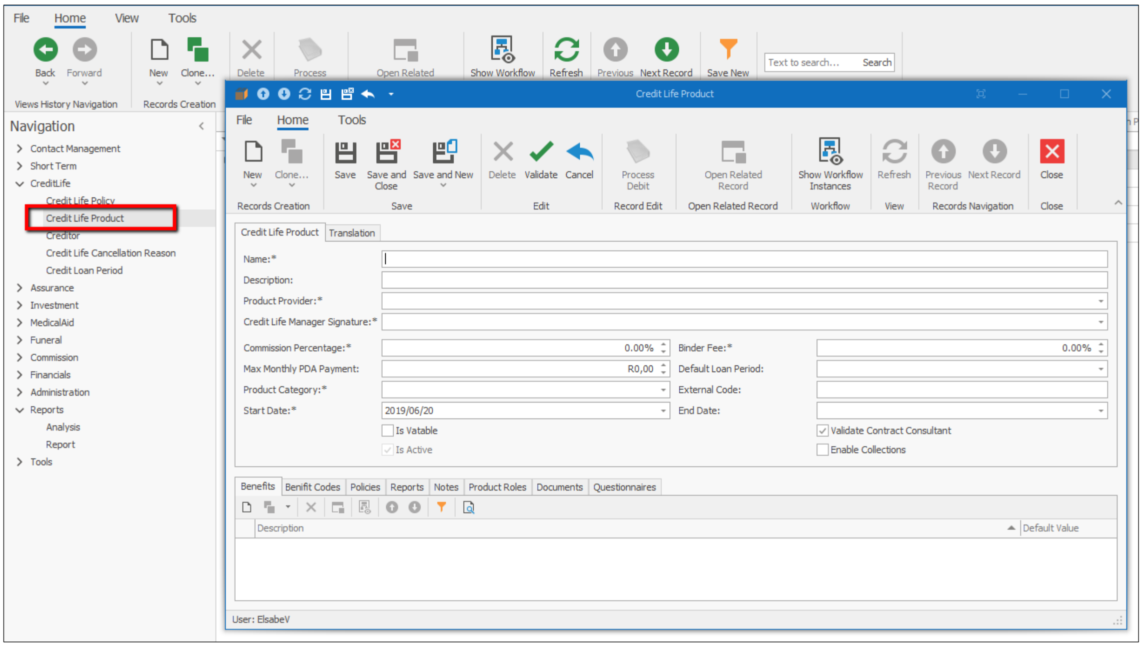
Create lists for the following items to be selected when a new claim is registered.

- Claim Estimate Category
- Recovery

Credit Life

Credit Life Product

A product must be set up in the application before any policies can be captured.



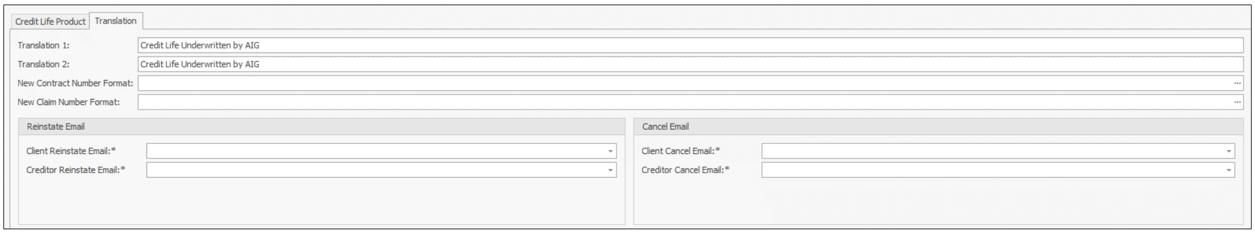
Detail

Fieldname	Description	Required
Name	Name of the Product you are creating	✓
Description	Simplified description of the Product	
Product Provider	Select the Provider details from your Contact list	✓
Credit Life Manager Signature	Select a default signature to be used with automated processes	
Commission percentage	Provide the percentage which will automatically be calculated when policy is generated	
Max monthly PDA Payment	Provide the max value. The application will not allow a value higher than this specified value to be captured for this product.	
Product Category	Identifies the product	✓
Start Date	Enter the date from which this Product is active.	✓
Is Vatable	Select if applicable	
Is Active	Only active products will be available on Credit Life policy for selection. Automatically Active when start date is entered and no end date is captured. Product will become in-active once end date is captured	
Binder Fee	Enter value when applicable	
Default loan period	Create a list of default values applicable to this product	
External code	Can be used as an internal reference e.g., Pastel codes for reporting	
End Date	Enter date from which this product is in-active	
Validate Contract Consultant	Commission process will validate Consultant on Contract with Consultant receiving commission.	
Enable Collections	Select when premium is collected on this product	

Translation

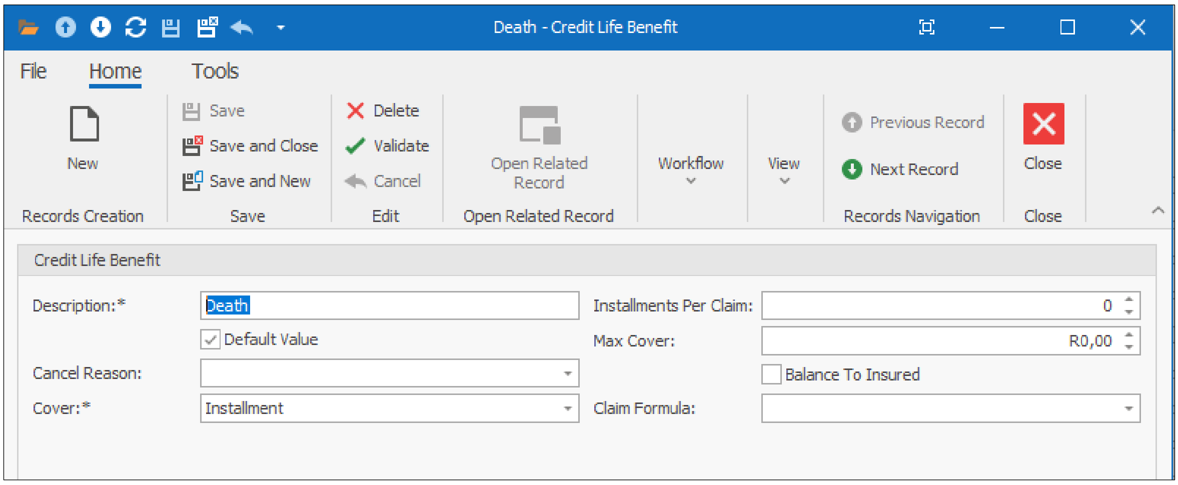
Contract and Claim number can be automated using specific criteria and back-end processes on the New Contract and New Claim Number format fields.

Please contact Teessen Consulting to discuss and implement your specific requirements.



Benefits

Capture a list of Benefits applicable to this product. These benefits will auto populate on the policy.



Apply product specific benefit structure which will be supportive to the claims process and claim estimate calculations.

Benefit Codes

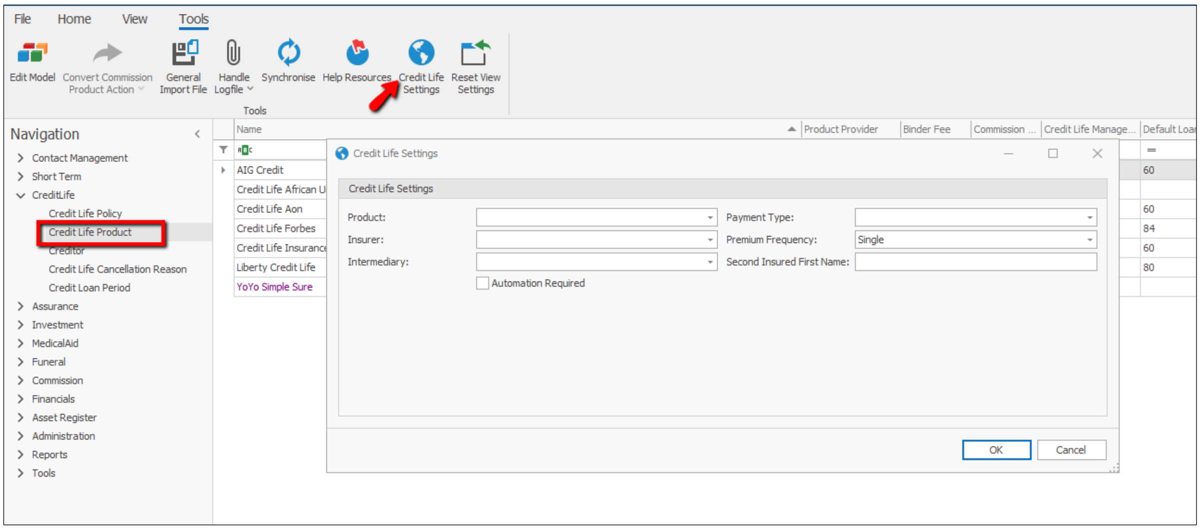
Each product has a unique benefit code which is used by the Commissions module for processing commission e.g., Sanlam Credit life etc.

Commission processing will fail if this is not specified.

Reports

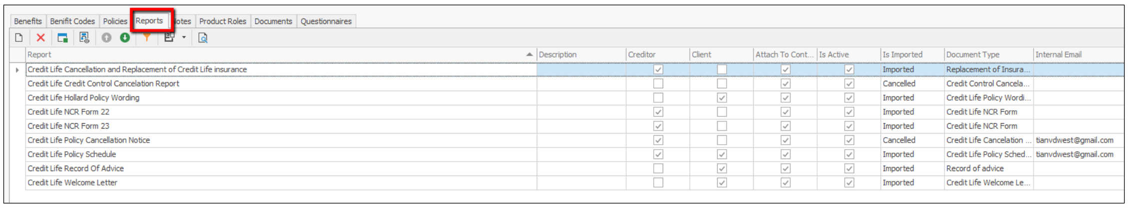
Reports can be send automatically using a backend process specifically set up for your business requirements.

This needs to be set up on Credit Life settings in conjunction with Teessen Consulting.

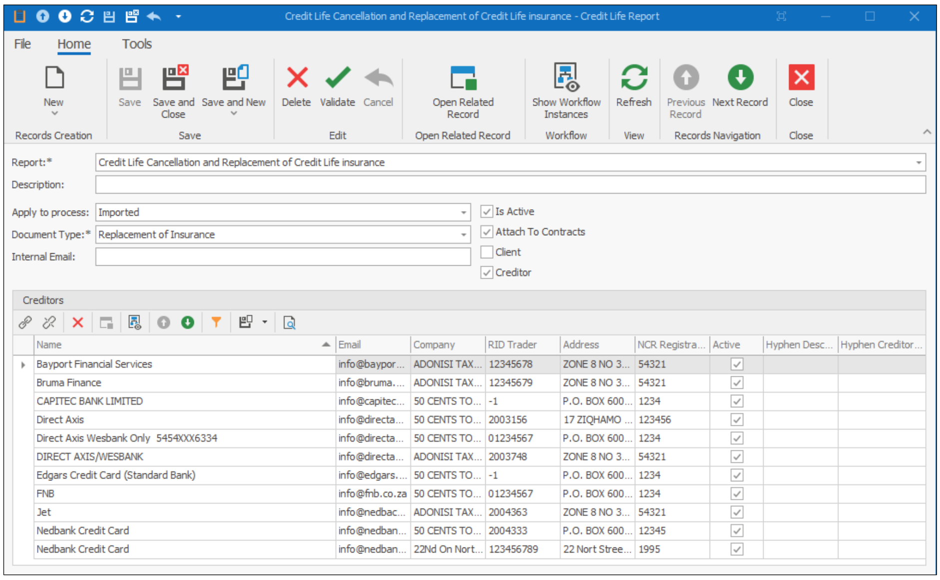


If Automation Required is selected, the compulsory fields on the Translation tab also needs to be completed.

Link specific reports relevant to this product to be used in automated processes:



Creditors are linked to the specific report:



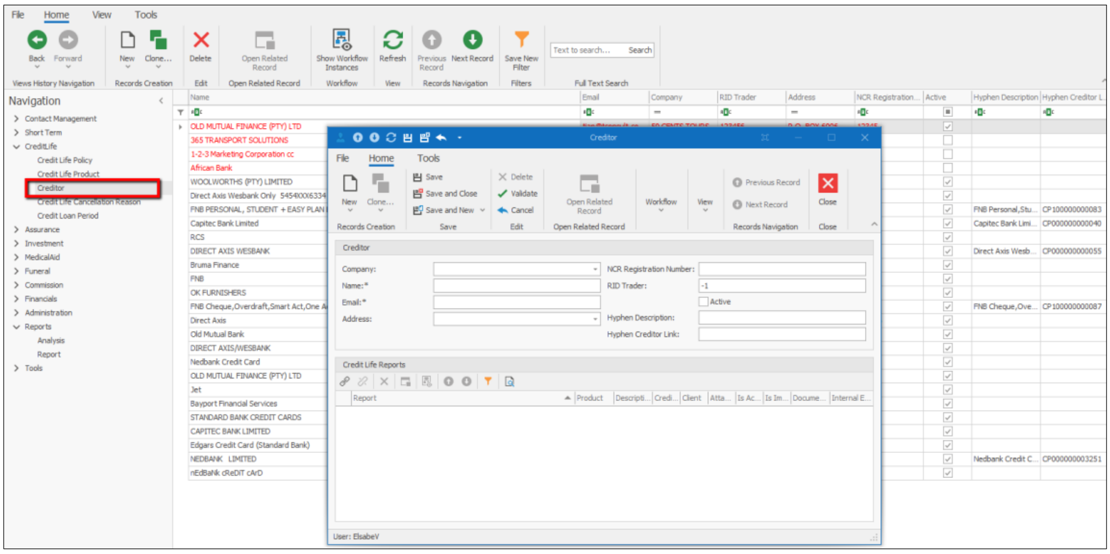
Product Roles

Each type of policy has its own unique product role(s) to be used when another person or entity has an interest on the specific policy e.g., Negotiator, Representative etc.

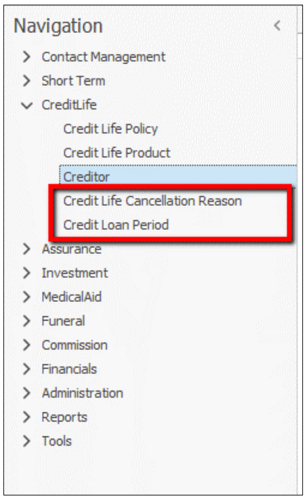
This is particularly important for claims purposes.

Creditor

Create a list of Creditors to be linked to the policy as well as reports, with their own unique information for reporting purposes.



Create lists for the following items to be selected when capturing or cancelling a policy:

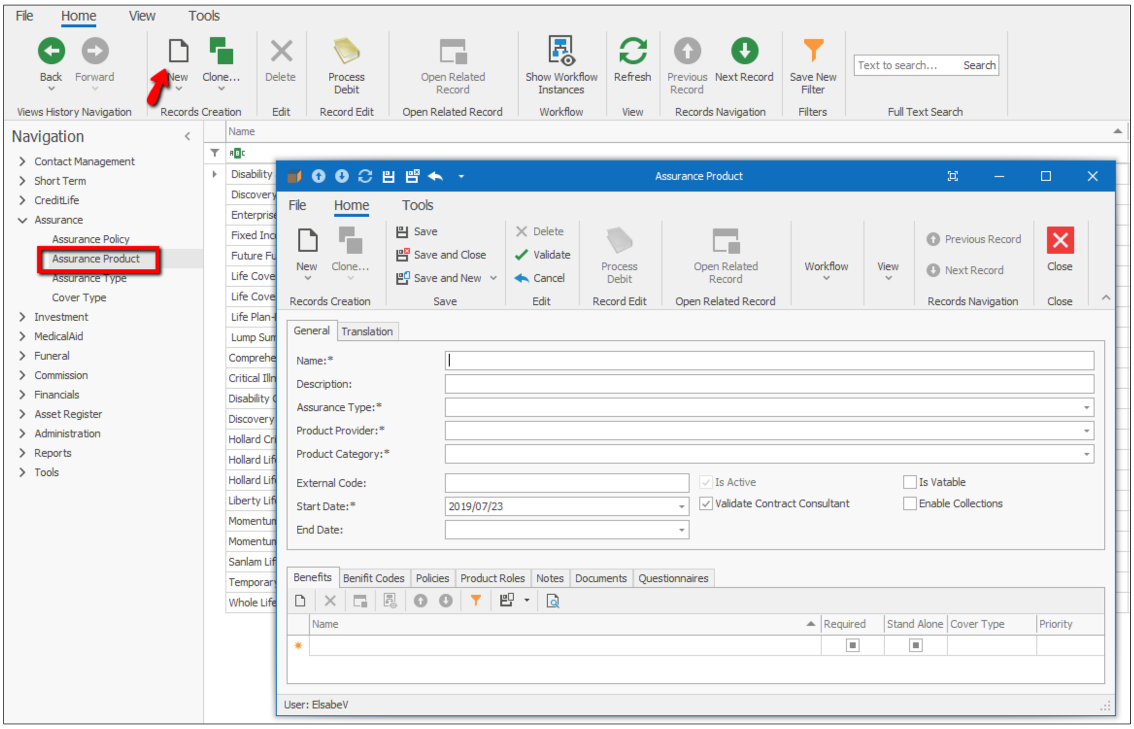


- Credit life cancellation reason
- Credit loan period

Assurance

Assurance Product

A product must be set up in the application before any policies can be captured.

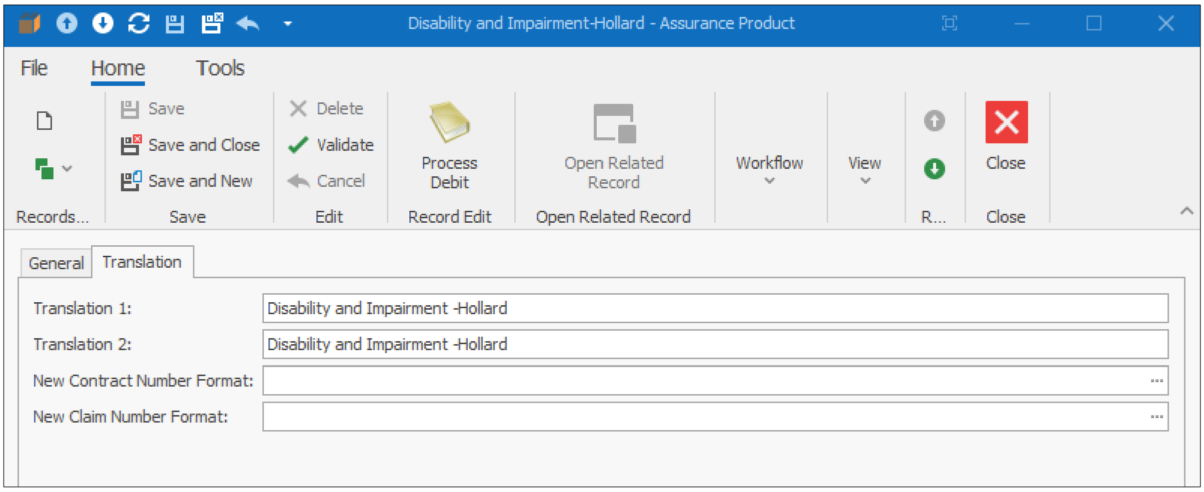


Fieldname	Description	Required
Name	Name of the Product you are creating	✓
Description	Simplified description of the Product	
Assurance Type	Specify the type of assurance product	✓
Product Provider	Select the Provider details from your Contact list	✓
Product Category	Identifies the product	✓
External Code	Can be used as an internal reference e.g., Pastel codes for reporting	
Start Date	Enter date from when this Product is active	✓
End Date	Enter date from when this Product is in-active	
Is Active	Only active products will be available on Assurance Policy for selection. Automatically Active once start date is entered and no end date is captured. Product will become in-active once end date is captured.	
Is Vatable	Select when applicable	
Validate Contract Consultant	Commission process will validate Consultant on Contract with Consultant receiving commission.	
Enable Collections	Select when premium is collected on this product	

Translation

Contract and Claim number can be automated using specific criteria and back-end processes on the New Contract and New Claim Number format fields.

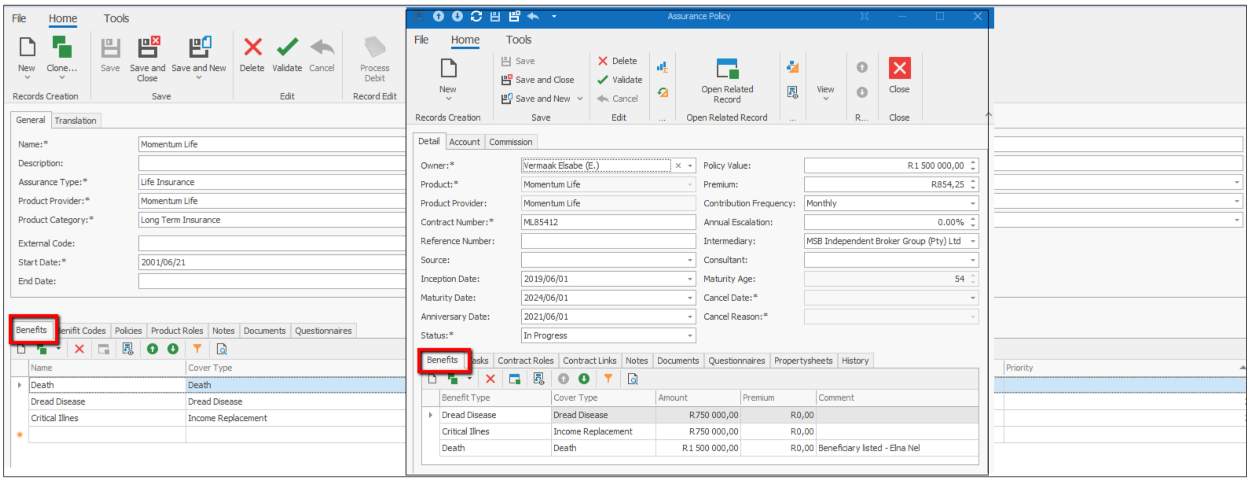
Please contact Teessen Consulting to discuss and implement your specific requirements.



Benefits

Capture a list of benefits unique to this product which will be auto populated on the policy once created.

Specify cover type per benefit to allow reporting on grouped information per Benefit type.



Benefit Codes

Each product has a unique benefit code which is used by the Commissions module for processing commission, e.g., Discovery Life, etc.

Commission processing will fail if this is not specified.

Product Roles

Each type of policy has its own unique product role(s) to be used when another person or entity has an interest on the specific policy, e.g., Keyman, Co-Insured etc.

This is particularly important for claims purposes.

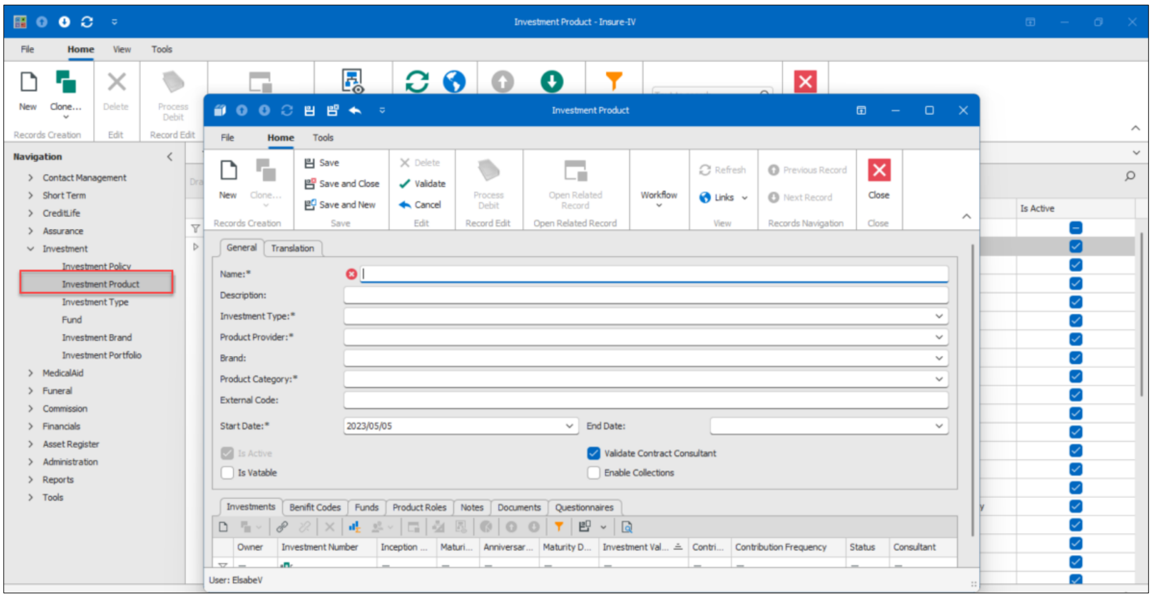
Assurance Type

Create a list of assurance types which can be selected when creating a new assurance product.

Investment

Investment Product

A product must have been set up in the application before any policies can be captured.



Fieldname	Description	Required
Name	Name of the Product you are creating	✓
Description	Simplified description of the Product	
Investment Type	Specify the type of investment product	✓
Product Provider	Select the Provider details from your Contact list	✓
Brand	Select the relevant Investment Brand listed on the Product Provider	
Product Category	Identifies the product	✓
External Code	Can be used as an internal reference e.g., Pastel codes for reporting	
Start Date	Enter date from when this Product is active	✓
End Date	Enter date from when this Product is in-active	
Is Active	Only active products will be available on Investment Policy for selection. Product is automatically Active when start date is entered and no end date is captured. Product will become in-active once end date is captured.	
Is Vatable	Select when applicable	
Validate Contract Consultant	Commission process will validate Consultant on Contract with Consultant receiving commission.	
Enable collections	Select when premium is collected on this Product	

Benefit Codes

Each product has a unique benefit code which is used by the Commissions module for processing commission, e.g., AIMS etc.

Commission processing will fail if this is not specified.

Funds
Link all Funds related to this Product to build the client's portfolio.

Product Roles
Each type of policy has its own unique product role(s) to be used when another person or entity has an interest on the specific policy e.g., Insured life etc.

Investment Type
Create a list of investment types which can be selected when creating a new Investment product.

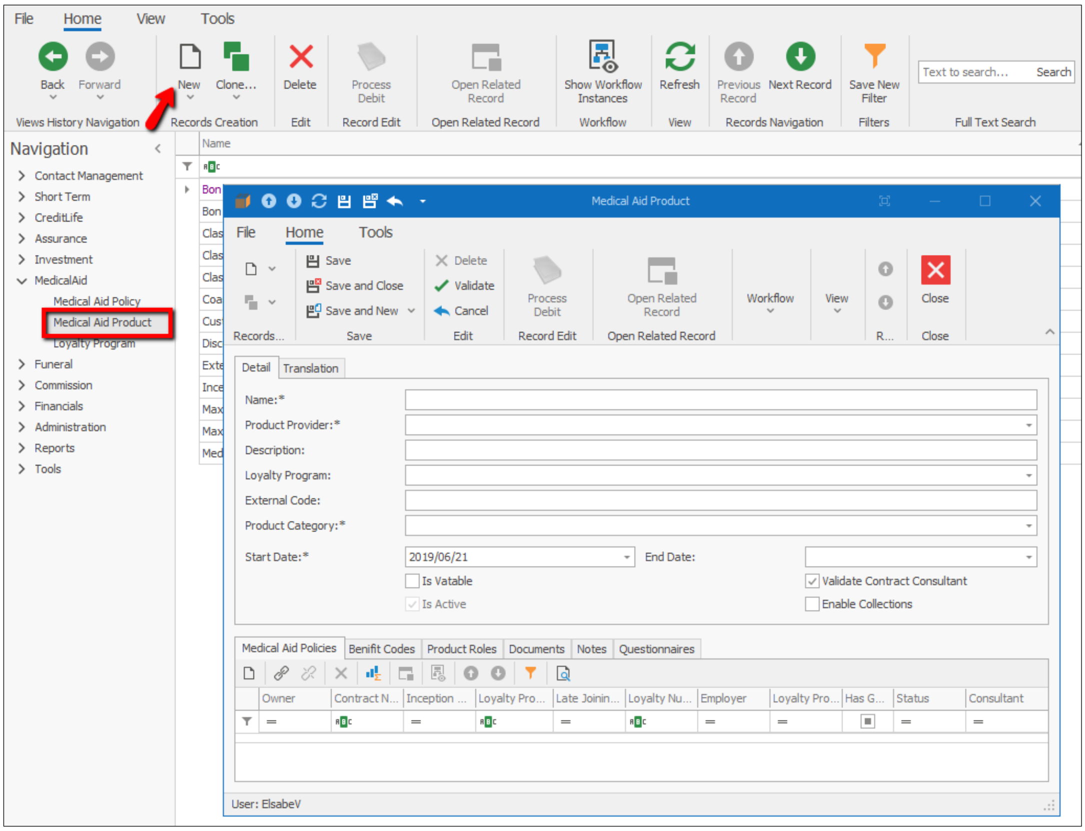
Fund
Create a list of Funds with fund codes which can be linked to various Investment Products.

Investment Brand
Create various Brand's per Product Provider which van be linked to a specific Investment Product

Medical Aid

Medical Aid Product

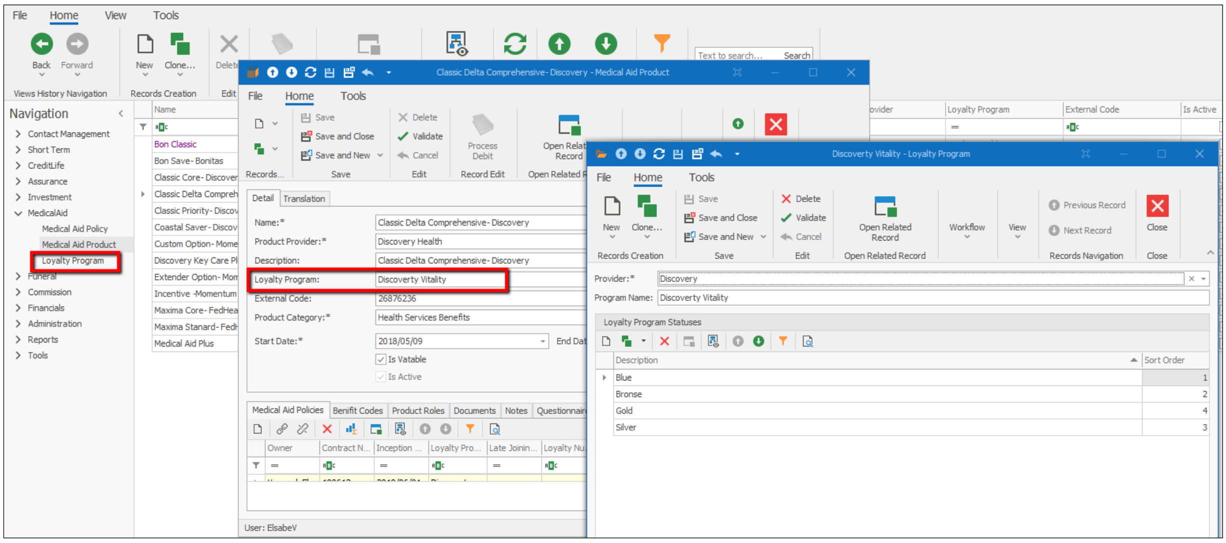
A product must be set up in the application before any policies can be captured.



Fieldname	Description	Required
Name	Name of the Product you are creating	✓
Product Provider	Select the Provider details from your Contact list	✓
Description	Simplified description of the Product	
Loyalty Program	Select the loyalty program relevant to this product	
External Code	Can be used as an internal reference, e.g., Pastel codes for reporting	
Product Category	Identifies the product category	✓
Start Date	Enter date from when this Product is active	✓
End Date	Enter date from when this Product is in-active	
Is Vatable	Select if applicable	
Is Active	Only active products will be available on Medical Aid Policy for selection. Automatically Active when start date is entered and no end date is captured. Product will become in-active once end date is captured	
Validate Contract Consultant	Commission process will validate Consultant on Contract with Consultant on which commission is received	
Enable collections	Select when premium is collected on this Product	

Loyalty Program

Set up a list of Loyalty Programs which needs to be linked to the Medical Aid Product.



Loyalty Program will auto populate on Policy when specified on Product.

Benefit Codes

Each product has a unique benefit code which is used by the Commissions module for processing commission, e.g., Medihelp etc.

Commission processing will fail if this is not specified.

Product Roles

Each type of policy has its own unique product role(s) to be used when another person or entity has an interest on the specific policy, e.g., Dependent etc.

Funeral

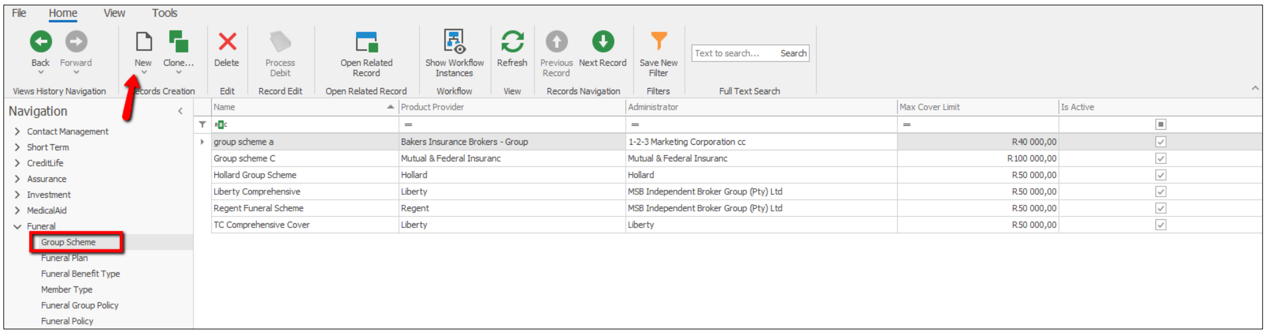
Group Scheme

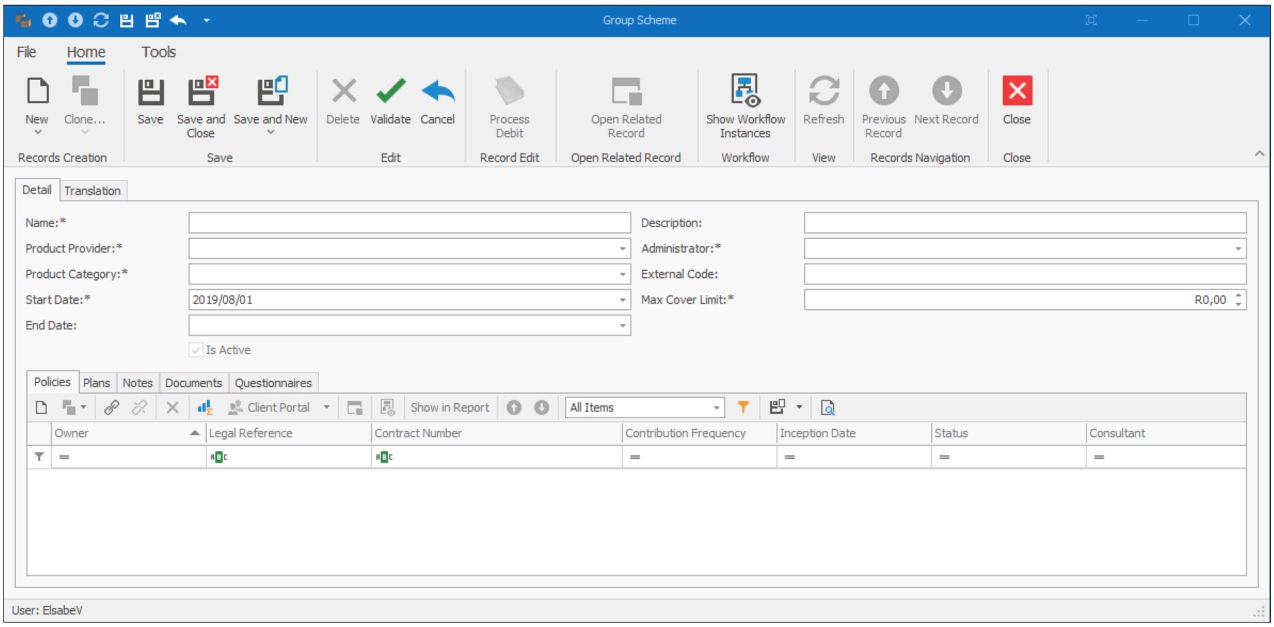
Policies for both Group Scheme and Individual Funeral plans can be administered within the Funeral Module.

Each Group Scheme will consist of various Funeral plans; each with their own unique criteria.

Create new Group Scheme

Select Group Scheme from the Navigation Pane:





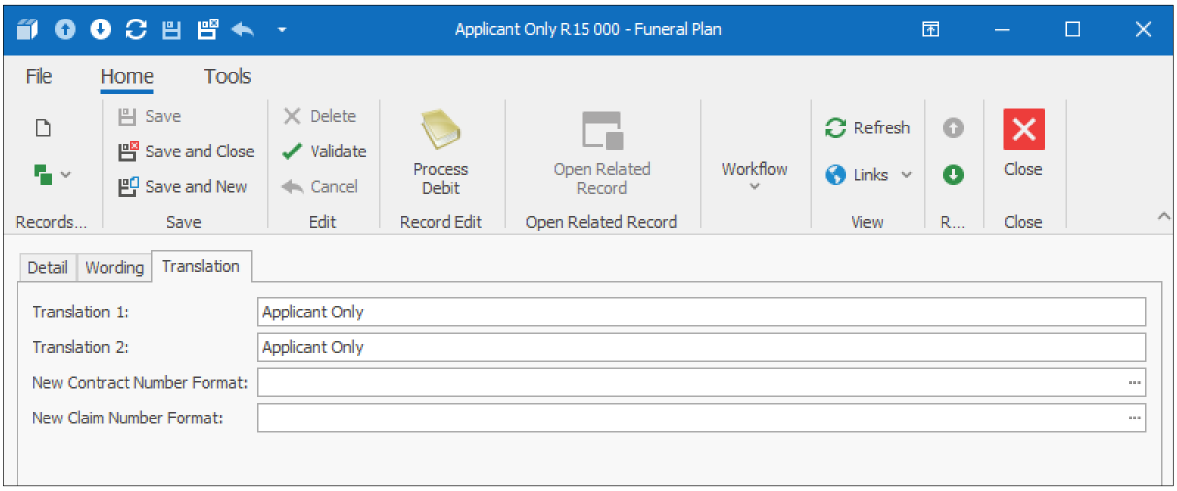
Fieldname	Description	Required
Name	Create a unique name for this Group Scheme	✓
Product Provider	Select Product Provider from database	✓
Product Category	Select Funeral Category	✓
Start Date	Enter Date from when this Group Scheme is active	✓
End Date	Enter Date from when this Group Scheme is in-active	
Is Active	Only active products will be available on Funeral policy for selection. Product is automatically Active when start date is entered and no end date is captured. Product will become in-active once end date is captured.	
Description	Add description for this Group Scheme	
Administrator	Select Administrator from database	✓

External Code	Capture external code if applicable	
Max Cover Limit	Enter overall max cover limit	✓

Translation

Both Contract and Claim number can be automated using specific criteria and back-end processes on the New Claim Number format field.

Please contact Teessen Consulting to discuss and implement your specific requirements.



Funeral Plans

Funeral Plan can be seen as the mandate from the Product Provider (Insurer) on the agreed Group Scheme which determines the Benefit Type, the members to be insured on the specific Type of cover and also the benefit structure of the Type of Cover.

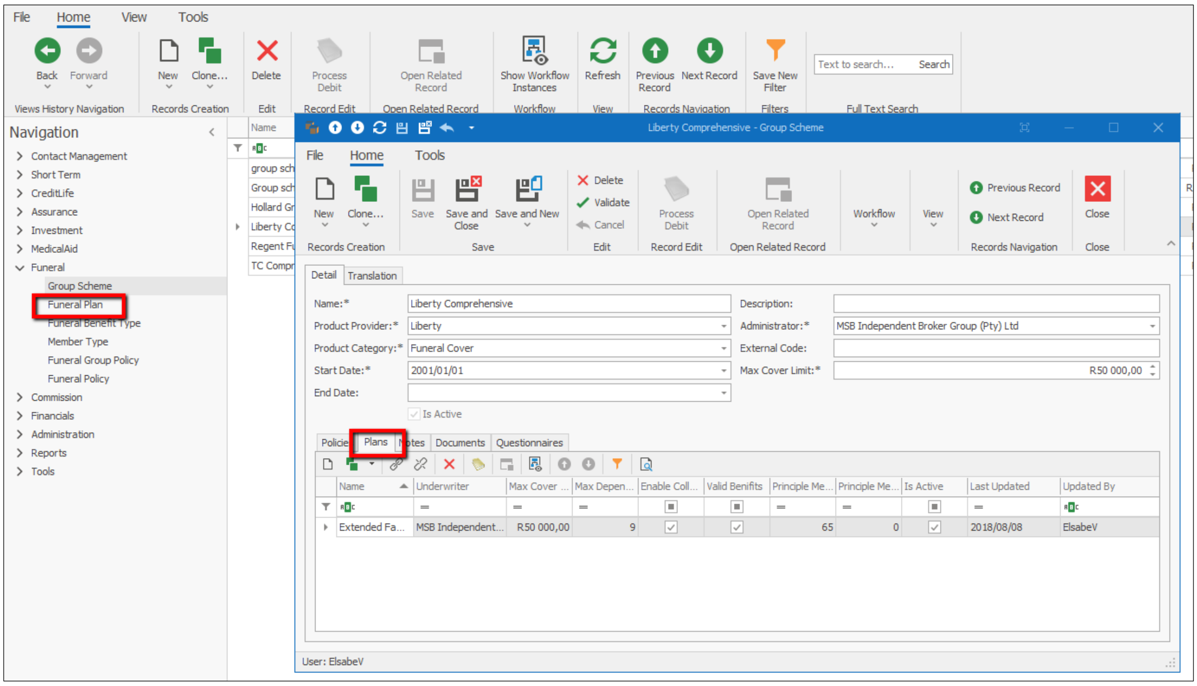
Example:

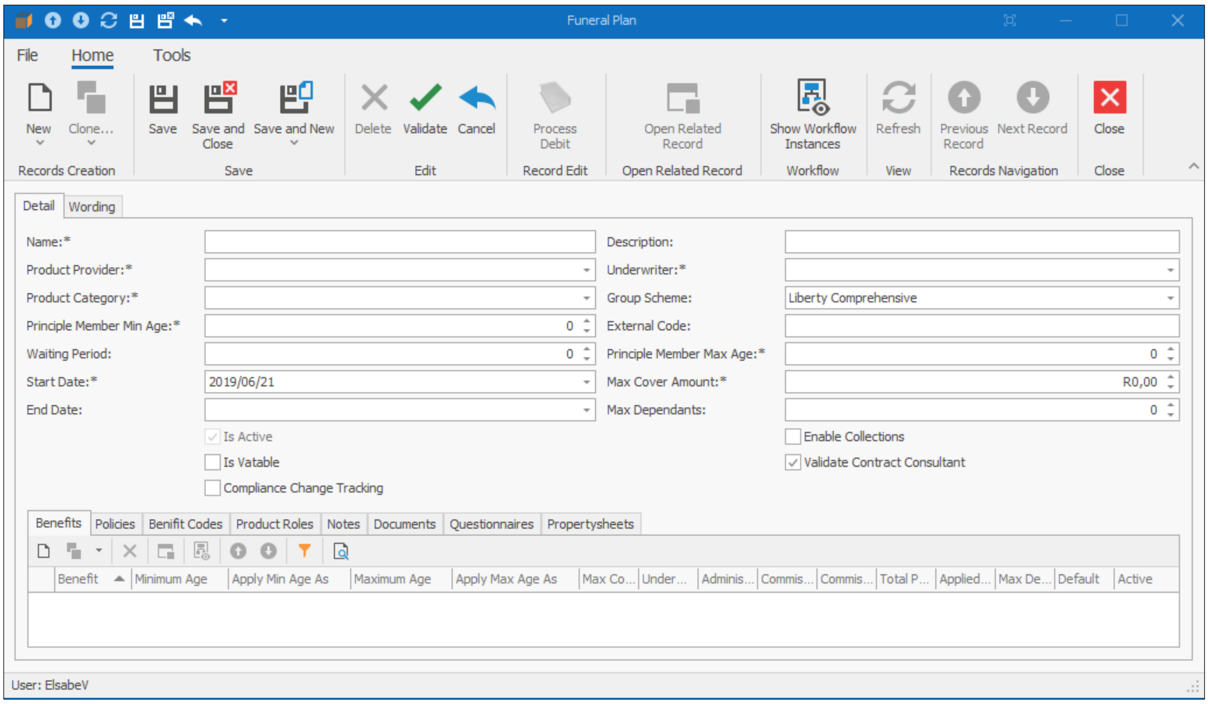
Benefit Type - Family Cover

Members (dependents) to be insured on Family Cover – Spouse & Child

Benefit structure of Family Cover i.e., 1 + 5 Ages 6 -21 R10 000 cover

Funeral Plans can be set up directly from the Group Scheme or separately when not part of a Group Scheme





Fieldname	Description	Required
Name	Select a unique name for this Plan	✓
Product Provider	Default to Product Provider specified on Group Scheme but can be edited if not the same	✓
Product Category	Default to Product Category selected on Group Scheme	
Principle Member Min Age	Enter minimum age	
Waiting Period	Waiting period applicable to this Plan	
Start Date	Enter Date from when this Group Scheme is active	✓
End Date	Enter Date from when this Group Scheme is in-active	
Is Active	Only active plans will be available on Funeral policy for selection. Plan is automatically Active when start date	

	is entered and no end date is captured. Plan will become in-active once end date is captured.
Is Vatable	Select if VAT applies to this product
Compliance change tracking	The application will prompt you to either create or select a task with the instruction for change
Description	Enter a more explanatory description
Underwriter	Select Underwriter from database
Group Scheme	Default to Group Scheme from which plan is created. Not available when Plan type is Individual
External Code	Unique external code when applicable
Principle Member Max Age	Enter maximum age
Max Cover amount	Maximum cover amount for this Plan
Max Dependants	Maximum dependants applicable to this Plan
Enable Collection	Collection premium on behalf of Insurer
Validate Contract Consultant	Select this option if validation is required
Wording	Enter policy wording

Benefits

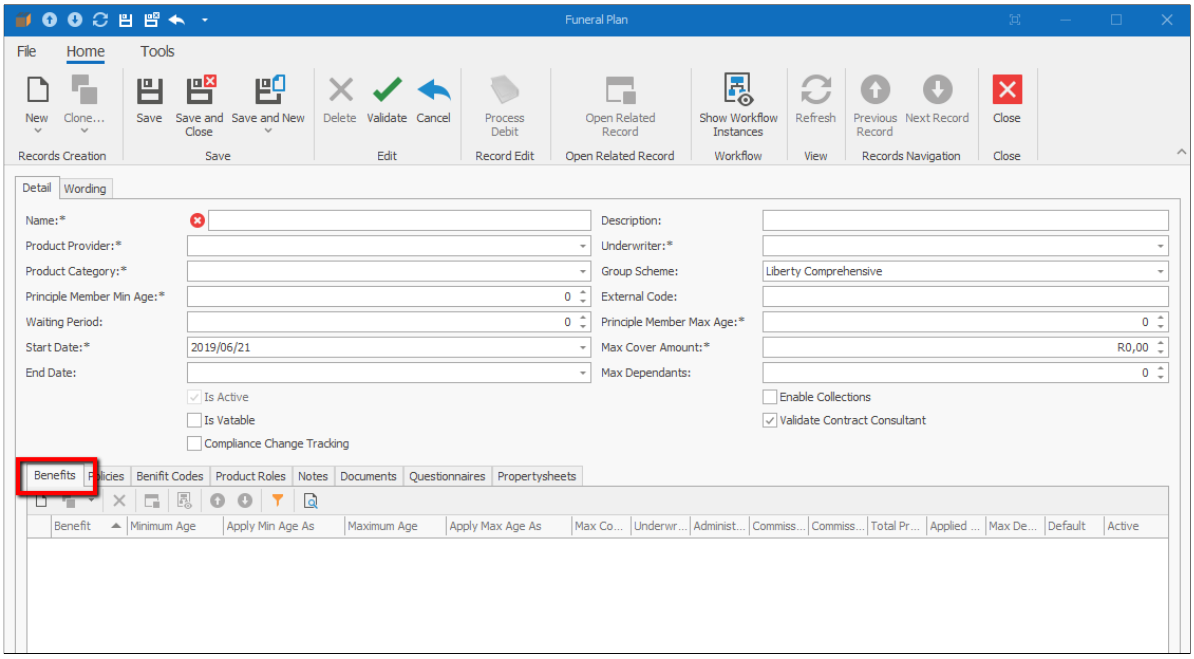
Each Funeral Plan has its own unique benefit structure.

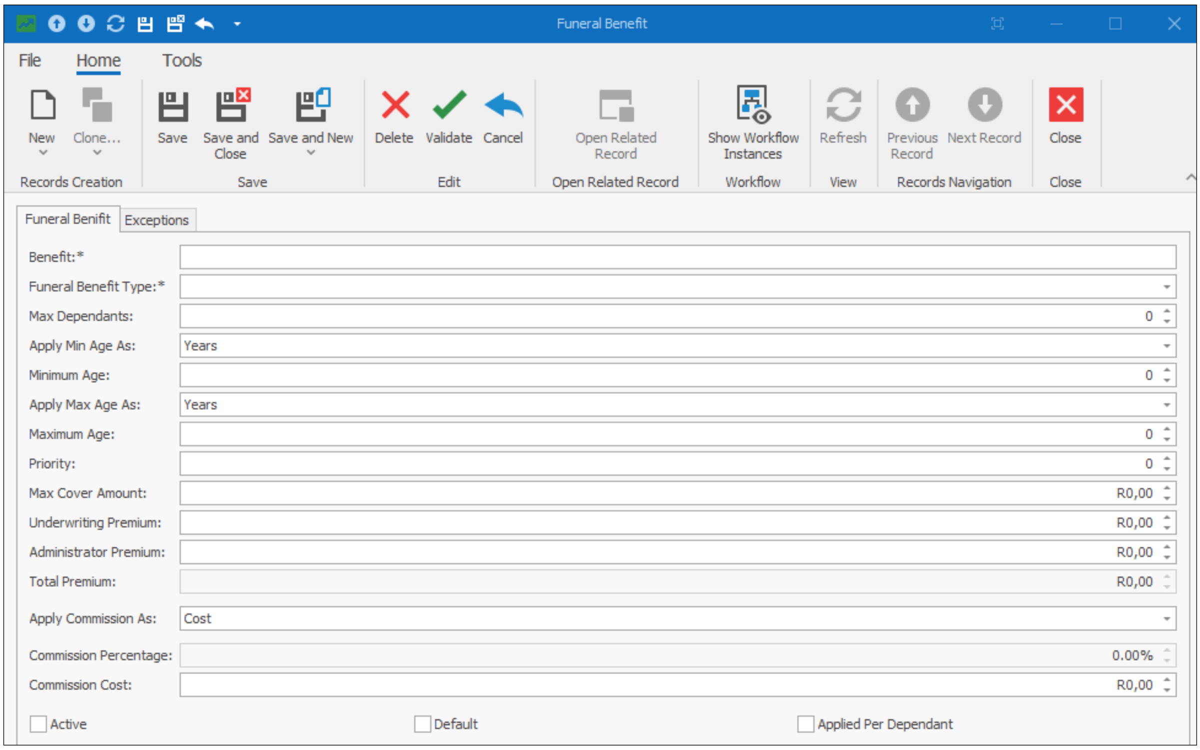
Family Cover, for example, may have a different structure per Group Scheme and even on Individual cover.

Each Funeral plan should have at least 1 benefit structure linked to a Funeral Benefit Type i.e.

- 1 + 5 Ages 6 -21 R10 000 cover
- 1 + 5 Ages 22 – 45 R20 000 cover

Exception rules regarding Students and/or Handicapped dependants must be specified on benefit:





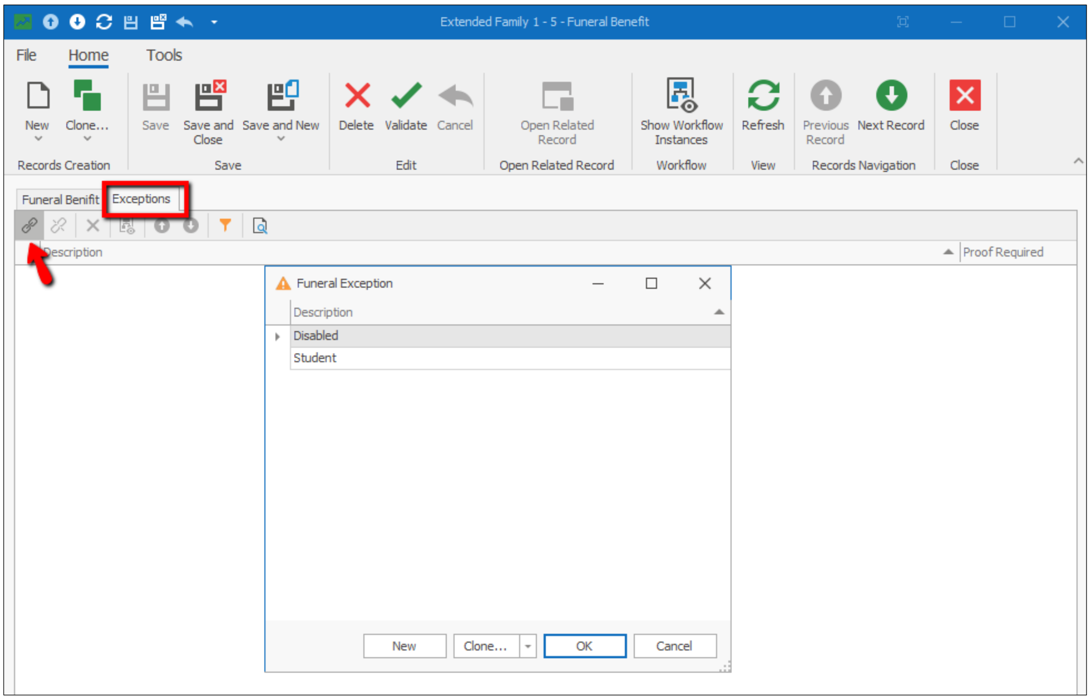
Fieldname	Description	Required
Benefit	Create a unique name for this benefit	✓
Funeral Benefit Type	Benefit type is linked to Member types which are relevant to this specific Funeral plan	✓
Max Dependants	Enter maximum dependants allowed on this benefit	
Apply Min Age As	Minimum age can be shown as months or years	
Minimum Age	Minimum age of person to be covered	
Apply Max Age As	Maximum age can be shown as months or years	
Maximum Age	Maximum age of person to be covered	
Priority	Select a priority for this benefit	
Max Cover Amount	Maximum cover amount any person can be covered for (if applicable)	
Underwriting Premium	Underwriting Premium for this benefit (if applicable)	
Administrator Premium	Administrator Premium for this benefit (if applicable)	
Total Premium	Total premium on which commission will be calculated if commission is specified as percentage	
Apply Commission As	Select either cost or percentage	
Commission Percentage	Enter percentage applicable	
Commission Cost	Enter commission value	
Active	Select 'Active' for this benefit to be available for user selection	
Default	Select if applicable	
Applied per dependant	Select if benefit is applicable per beneficiary. Underwriting- and Administrator premiums should be entered if cost is applicable per dependant	

Exceptions

Exceptions will apply on age of Dependant if dependant is older than 21, but still a Student or a Handicapped person.

This rule will allow you to capture this Dependant if the exception is selected and the required supporting documents attached.

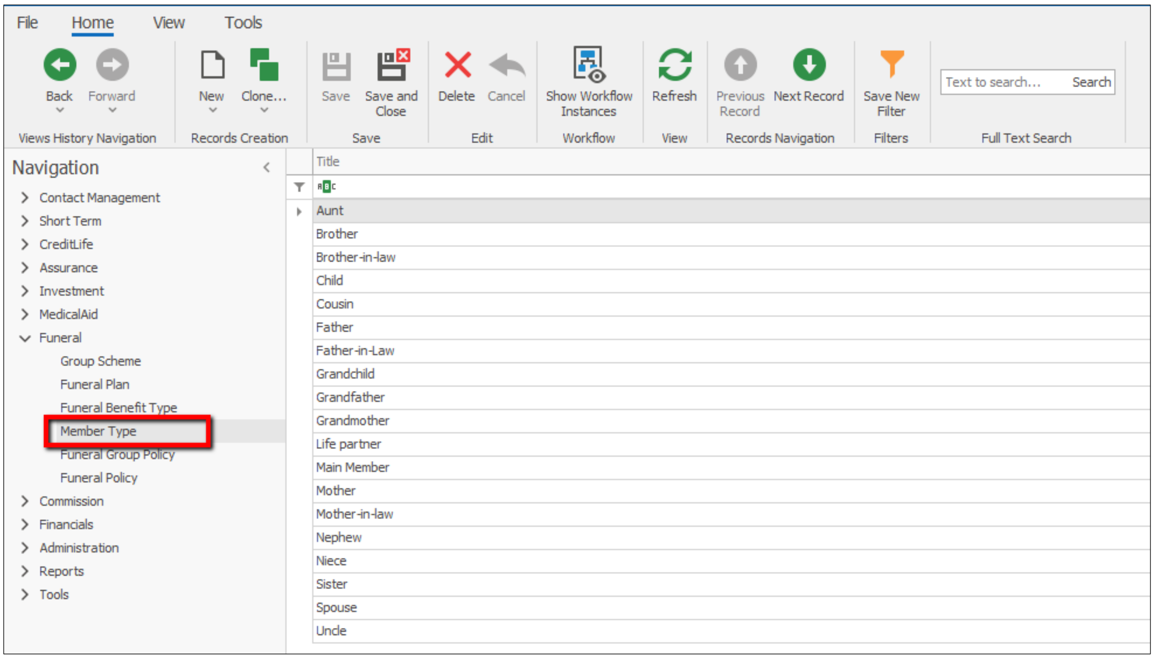
More Exceptions can be added if required.



Member Type

Member types can be set up on the Benefit screen or via the Navigation panel.

Each Funeral Benefit type has its own list of members. Only these members specified will be available for selection when this benefit is selected on a Funeral Policy.



Benefit Codes

Each product has a unique benefit code which is used by the Commissions module for processing commission, e.g., Funeral etc.

Commission processing will fail if this is not specified.

Product Roles

Product Role refers to the role of a person, other than the Principal Owner, on this specific policy.

Make sure that Beneficiary and Dependant is selected as a required role if applicable.

Commission

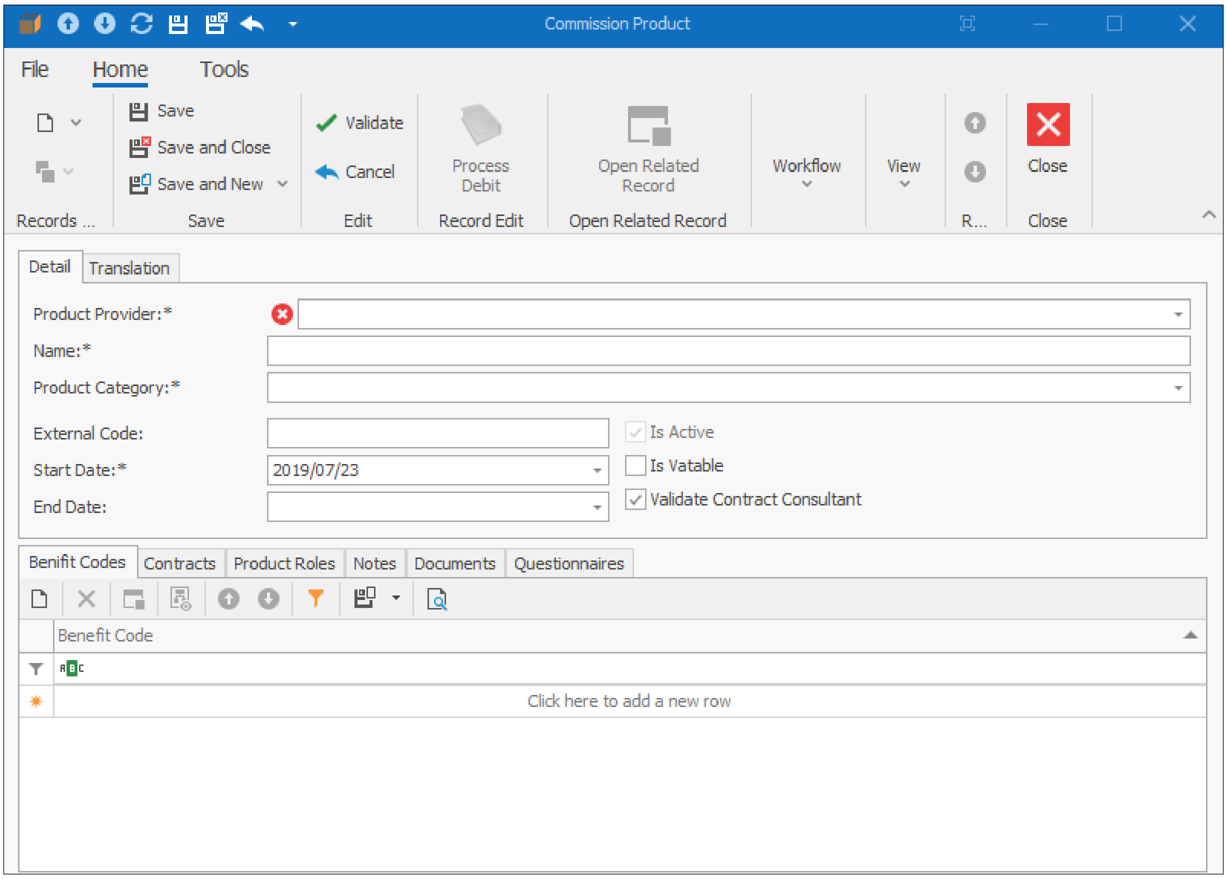
Configuration

In this section we will discuss the configuration requirements that supports the commission process.

Commission Product

This represents each of the products that you will be receiving commission on.

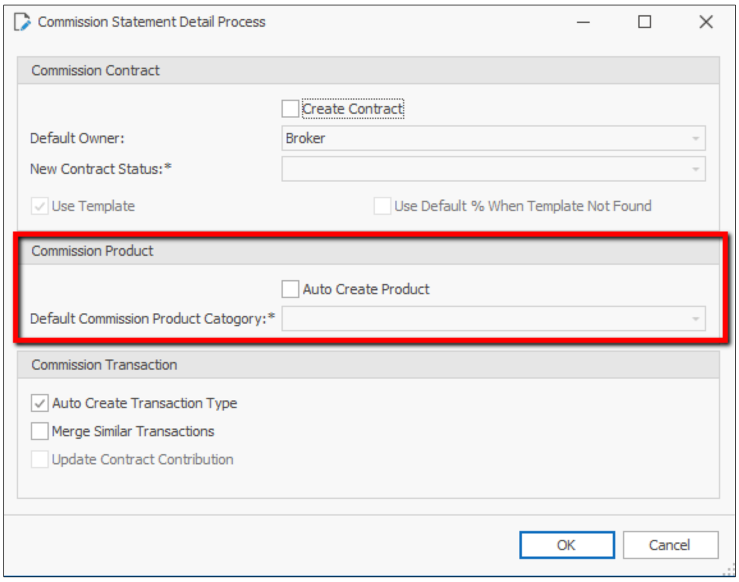
You may choose to pre-populate a list of Products by using the Commission Product function from the Navigation pane.



Fieldname	Description	Required
Product Provider	The company providing this product. Must be specified in Contact Manager as a company record with the contact type of Supplier.	✓
Name	Unique friendly name for this product.	✓
Product Category	Use this for segmentation of your products into various market segments or compliance business classes. (Life, Medical, Short Term, etc.)	✓
External Code	General ledger code which becomes applicable with Pastel Integration.	
Start Date	Enter date from which this Product should be active	✓
End Date	Enter date from which this Product should be in-active	
Is Active	Indicates if Product is active or in-active as determined by Start and End dates	
Is Vatable	Determine if VAT applies for this product. If a commission statement is captured and not imported,	

	then this property will control the capturing of VAT on the individual transactions.
Validate Contract Consultant	Validates if Broker on transaction and Consultant specified on Contract is the same

or choose to select the Auto Create Products during the commission import process:



The product can be created automatically using the import process and need to be checked for correctness when created for the first time.

Your choice will be determined by how you want to structure reporting.

The product data is critical for the link between the commission statement file received from the product provider and the application.

'Validate Contract on Consultant' will determine if the warning *"The Broker is not the same as the Consultant on the contract"* is relevant or not. Please refer to Clear Warning

Typically, in short term the Product provider will issue a Brokerhouse code on which all commission is released instead of individual Broker codes. In this instance, you may choose to ignore the Warning by default.

Benefit Code

Each product has a unique benefit code which is used for processing commission, e.g., Santam Multiplex etc.

Commission processing will fail if this is not specified.

Product Roles

Each type of policy has its own unique product role(s) to be used when another person or entity has an interest on the specific policy e.g., Negotiator, Representative etc.

Commission Product Category

Use these user defined Product Categories to group products into various market segments and/or Compliance Business Classes e.g., Life, Short term etc. Using categories will improve your reporting.

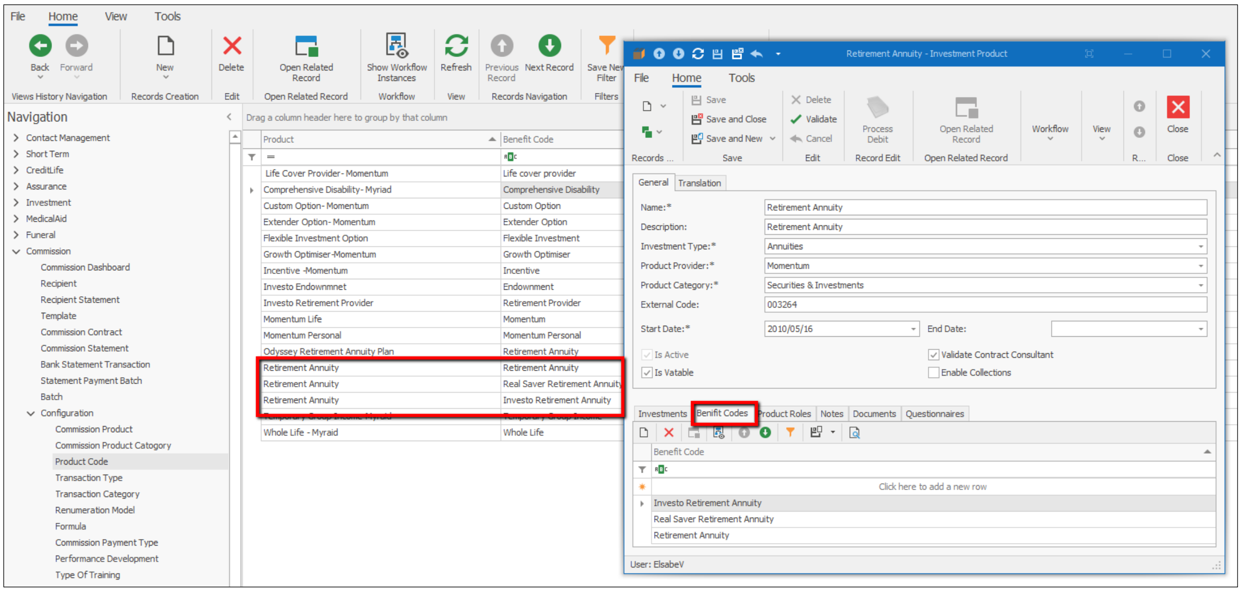
These Categories are a direct link to the Recipient Competence Register and Broker Contract.

Product Code

Product Providers may name their Products similar referring to the same type of product. It is now possible to group these Products by capturing the different product codes against a Product Group instead of each Product individually e.g., Retirement Annuity vs Real Time Retirement Annuity and Investor Retirement Annuity etc.

Each product has a unique benefit code which is used by the Commissions module for processing commission, e.g., Santam Multiplex etc.

Commission processing will fail if this is not specified.



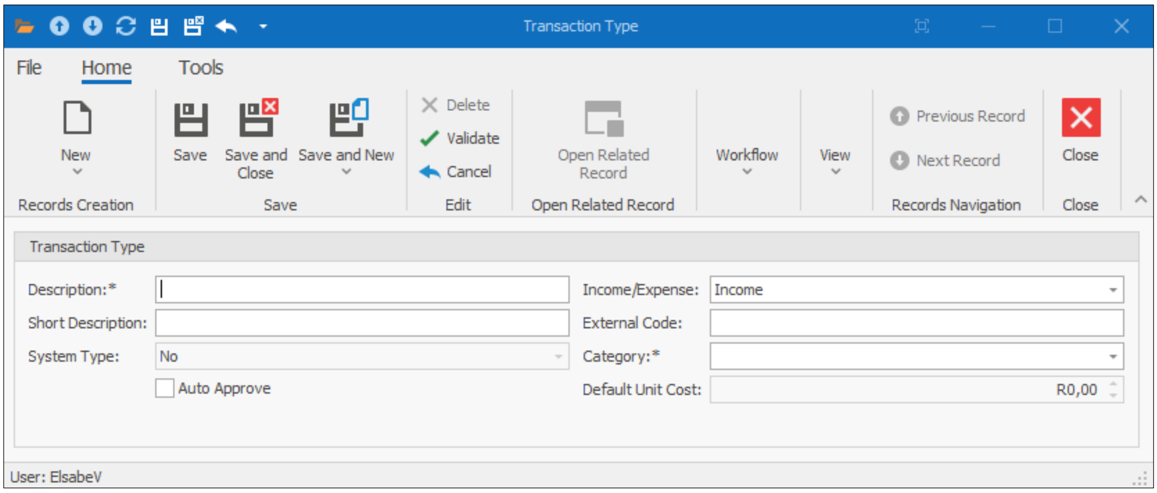
Transaction type

Transaction type plays an important role in the setup of a commission splitting rule.

It can be manually set up or auto created during the import process.

One Product Provider may define a transaction type differently than another product provider, although it might mean the same e.g., New Business vs Initial – New Business.

The Transaction Type- and Transaction Category sections will assist in cleaning this data to simplify reporting:



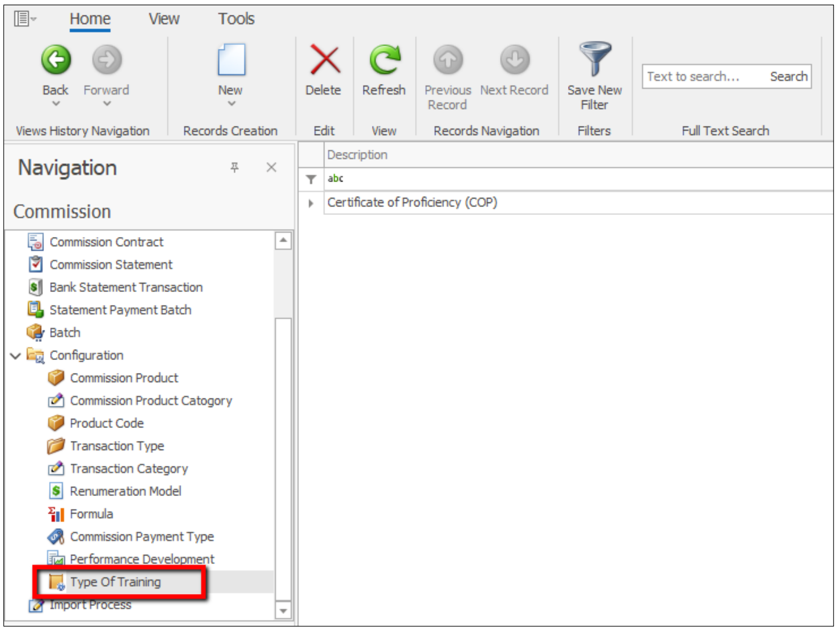
Fieldname	Description	Required
Description	Provide a user-friendly name for the transaction. It will be used in display and reporting.	✓
Short Description	This provides the link to the transaction type as referred to by the product provider and you should take care before changing this property as it will influence the import process. As with product, transaction types can also be generated automatically using the commission import process.	✓
System Type	System use only	
Auto Approve	If selected, any new transaction created with this type will be approved automatically. The only exception is expenses that can only be approved from the expense batch.	
Income/Expense	Income transaction types are used for transactions created for the commission statement. Expense transaction types will be those transactions that you specify as running expenses for the recipient. Fees or services provided will be defined as expenses and deducted from the recipient account.	✓
External Code	You can also link a transaction to an external application by using this property.	
Category	Categories provide a better way to group the same type of transactions together. Splitting rules can be specified per category. If you want to split 'Initial' commission differently than e.g., 'on-going' commission, use transaction category to perform this.	
Default Unit Cost	Only expenses allow a default cost. This will be based on the expense definition created for the recipient.	

Performance Development

Set up a list of performance rating classifications according to your Business Requirements that can be selected on Recipient record.

Type of Training

Capture a list of Training types that will be available for selection during capturing of Competence Register.



Commission Payment Type

Payment type determines the format in which the payment file is generated during the month-end process.

Please contact Teessen Consulting with your specific requirements.

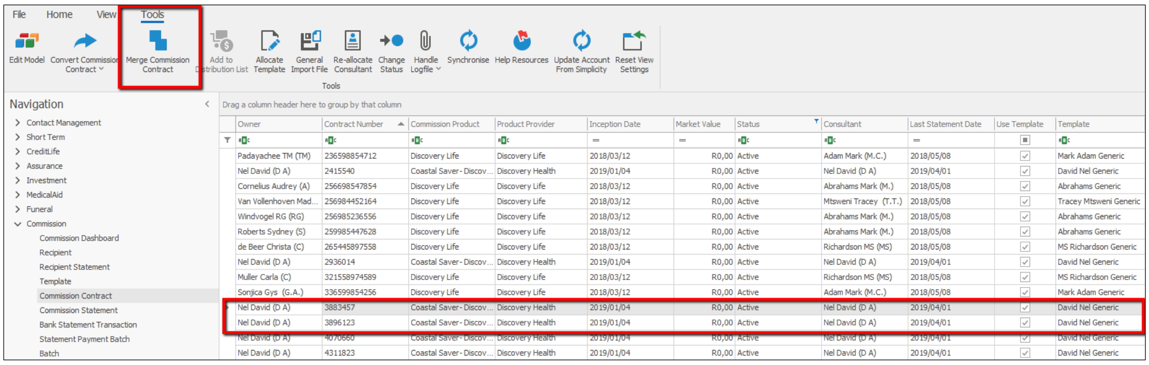
Merge duplicate Contracts

Duplicate contracts can be merged provided that the Owner and Product Provider of both records are the same.

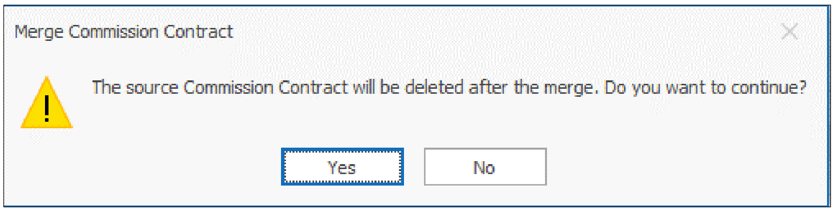
Fields that will be merged:

- Statement Details
- Market Values
- Tasks
- Notes
- Documents
- Questionnaires
- Property Sheets

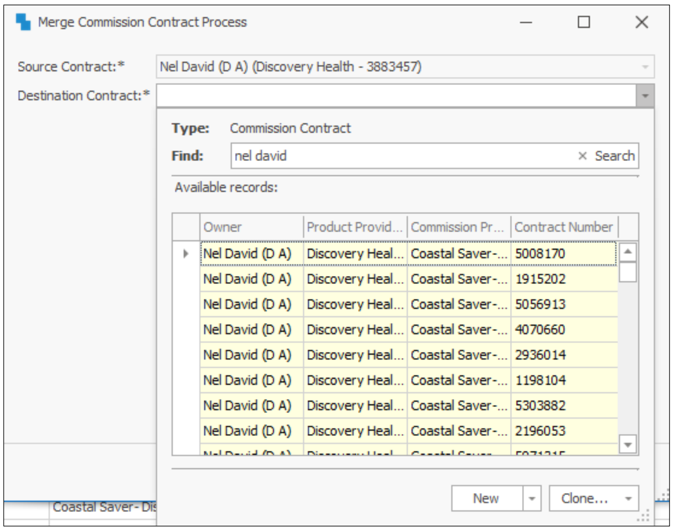
Select the Source contract (duplicate record no longer required) from the Commission Contract list view:



Select Merge Commission Contract from the Tools Menu.



Select the Destination Contract from the dropdown menu. Only contracts where the Owner and Product provider are the same as the Source Contract will be displayed in the dropdown:

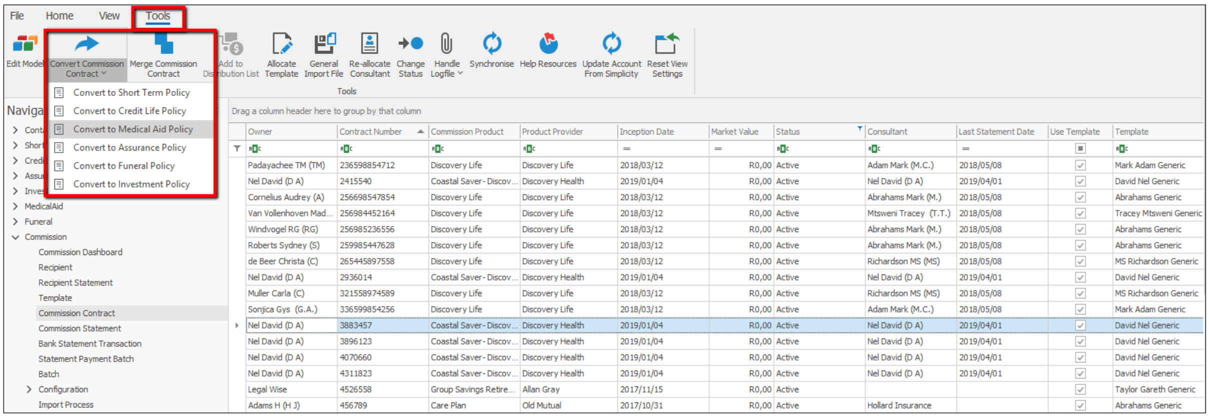


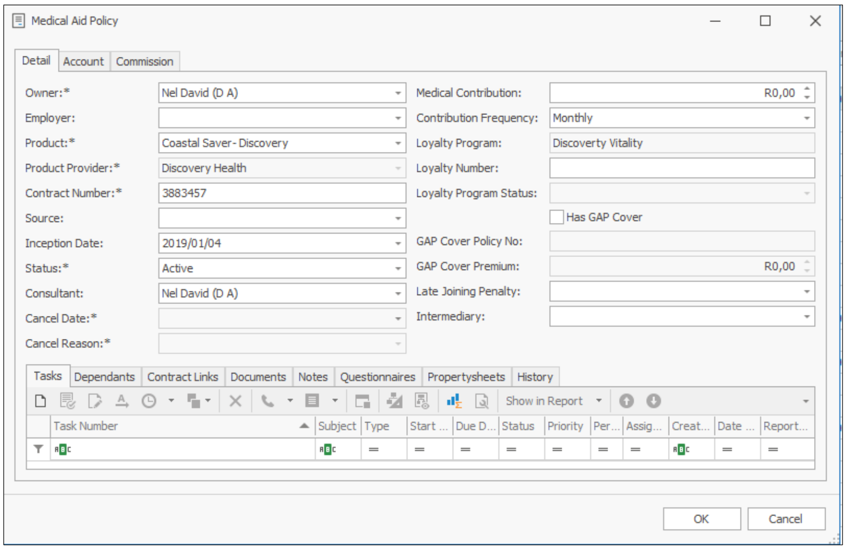
Only the Destination Contract will now be displayed in the list view.

Convert Commission Contract

When policies are imported via commission processing, they are automatically created as Commission Contracts.

These commission contracts can then be converted to the specific module or product e.g., Assurance, Medical Aid, etc.





Financials

Configuration of the various reference tables is an important part of how the Financial module implements business rules.

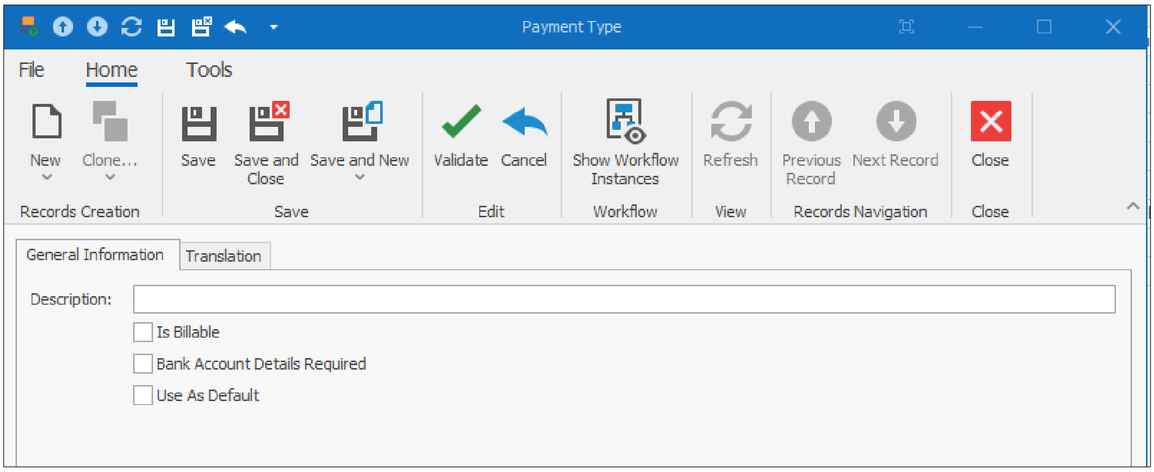
The values specified for these properties will determine how the ledger accounts and journal transactions are validated.

Payment Type

Contracts are linked to payment types to determine how the premium or fees related to the contract will be paid.

For short-term policy, you might want to select the “Collected by Insurer” as an option and when you are using the collection functionality you will want to use the “Debit Order” option.

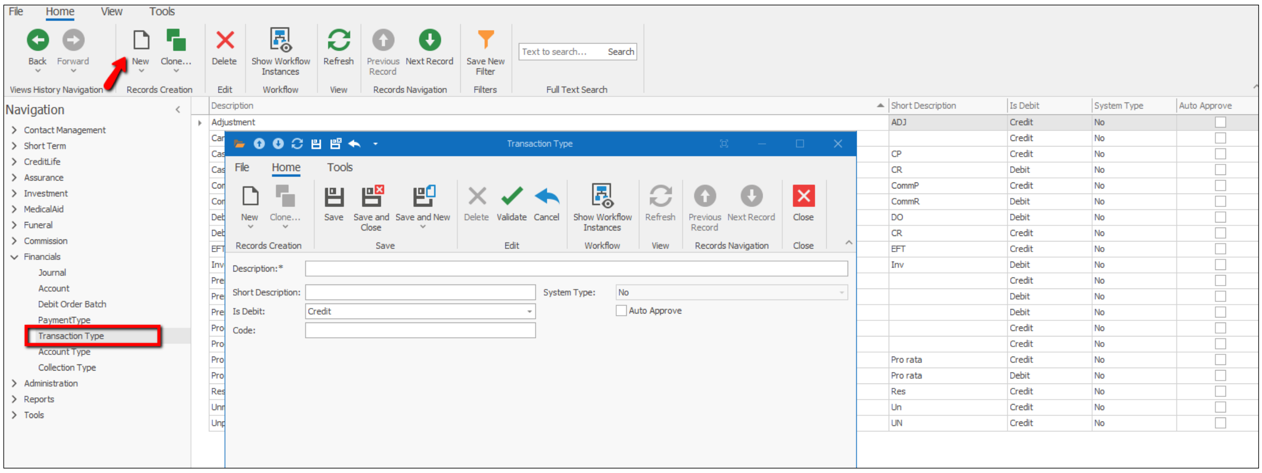
The rules related to these payment types will determine if you need to specify banking information or not.



Fieldname	Description	Required
Description	Unique name for this payment type	✓
Is Billable	When selected the contract will be included in the invoicing process or the *Timesheet module	
Bank account details required	For contracts with this payment type the contract also need to have banking details specified. For contracts participating in collections their payment types will have this flag set	
Use as default	When selected, all new contracts will be set with this type	

Transaction Type

Transaction type will determine if the transaction is a debit- or credit transaction.



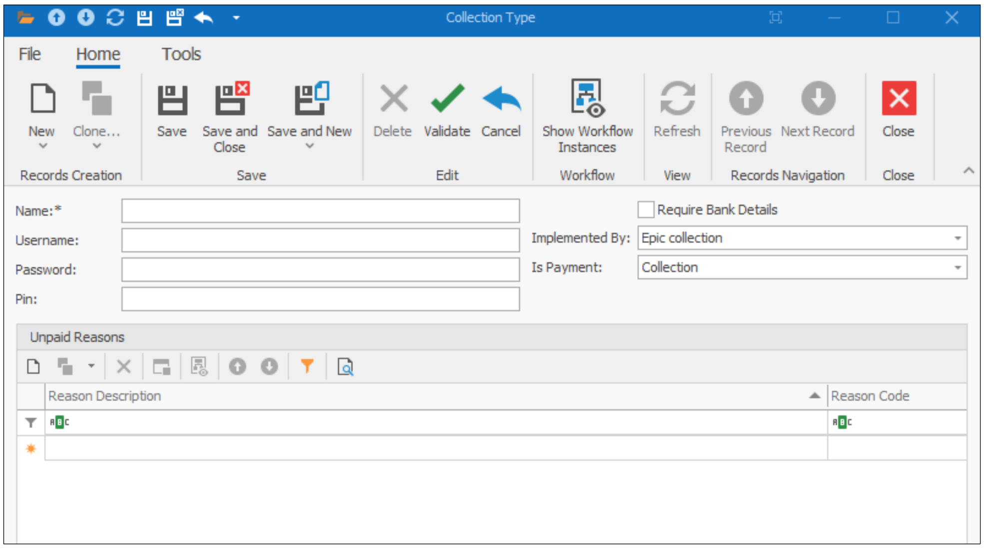
Fieldname	Description	Required
Description	Unique name for this transaction type	✓
Short Description	Use this for codes or abbreviations of transaction types	
Is Debit	Identifies the transaction as either Debit or Credit transaction. It will also validate the amount captured on the transaction	✓
System Type	Pre-defined types can be added to the financial module. These are used within system processes and cannot be altered by any user	

Collection Type

The financial module include functionality to collect premiums or fees from various collection houses or API's.

The following is a list of pre-installed collection and payment API's:

- Epic
- Escape
- SAGE
- FNB
- Other API's can be added on request



Fieldname	Description	Required
Description	Unique name for this collection type	✓
Username	Username for login to the selected API. Only required if the connection to the API is direct. When generating only payment files these details will not be required	
Password	Password for login to the selected API	
Pin	Pin for accessing the API	
Require Bank Details	Select if banking details will be required for this specific collection type	
Implemented By	Select the API that will be used in generating the payment or collection	
Is Payment	Specify if this payment type will institute a payment or a debit order collection	
Unpaid Reasons	List of reason codes returned from the API why a collection failed for the supplied account	