



Teessen Consulting

2023

TC Web Application – Administrator Guide

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Teessen Consulting

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Introduction

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 and relevant permissions and securities as determined by the business during initial setup.

User login and URL will be provided via email.

This is only a temporary password and the 'Change Password On First Logon' will be activated automatically.

Reset User Passwords

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

Navigate to Permission User on the Navigation Pane:

	Full Name	User Name	Prefix	Billing Rate	My Person	Notify Email	Confidentiality Level	Color	Is Active	Is Admin	Email Account
☐	Administrator	Admin	ADM	R 0.00			Level 5	#FF0000	☒	☒	
☐	CLS User	CLSUser	CLS	R 0.00			Level 5	#000000	☒	☒	CreditLifeEmail
☐	Evaluation User Account Test	NielTest	NBT	R 0.00		niel@tconsult.co.za	None	#000000	☒	☐	
☐	HAJ Nel (N.)	HAJ	HAJ	R 0.00	HAJ Nel (N.)	haj@tconsult.co.za	Level 5	#000000	☒	☒	
☐	Niel Booysen	NielB	NB	R 0.00		niel@tconsult.co.za	Level 3	#000000	☒	☒	TC Services - TCSVR002
☐	Petro Teessen	PetroT	PT	R 0.00		petro@tconsult.co.za	Level 5	#000000	☒	☒	Outlook Mail
☐	Shamiehl Jacobs	ShamiehlJ	SJ	R 0.00		shamiehl@tconsult.co.za	Level 5	#000000	☒	☒	
☐	Teessen Pieter (P.G.)	PieterT	GT	R 0.00	Teessen Pieter (P.G.)	pieter@tconsult.co.za	Level 5	#000000	☒	☒	Outlook Mail
☐	Vermaak Elsabe (E.)	ElsabeV	EVX	R 0.00	Vermaak Elsabe (E.)	elsabe@tconsult.co.za	Level 5	#000000	☒	☐	Outlook Mail

Select the user record to Reset Password. **NB! Do not select Edit record**

Permission User - Vermaak Elsabe (E.)

Full Name: Vermaak Elsabe (E.) User Name: ElsabeV

Billing Rate: R 0.00 Prefix: EVX

My Person: Vermaak Elsabe (E.) Color: 0;0;0

Notify Email: elsabe@tconsult.co.za Email Account: Elsabe Vermaak

Confidentiality Level: Level 5 Team: Commission

Reminder Check Time: 0

Registration Code: 5d401e0c-7064-4872-a9af-7262d610353a

☒ Force Password Change

☐ Is Admin

☐ Is System User

☐ Is Box User

☒ Win

☒ Web

Export to: Automated Wizard

Notification Type: Info

Date Created: 11 June 2020 04:36 PM

Priority: Normal

Created By: ElsabeV

URL:

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.



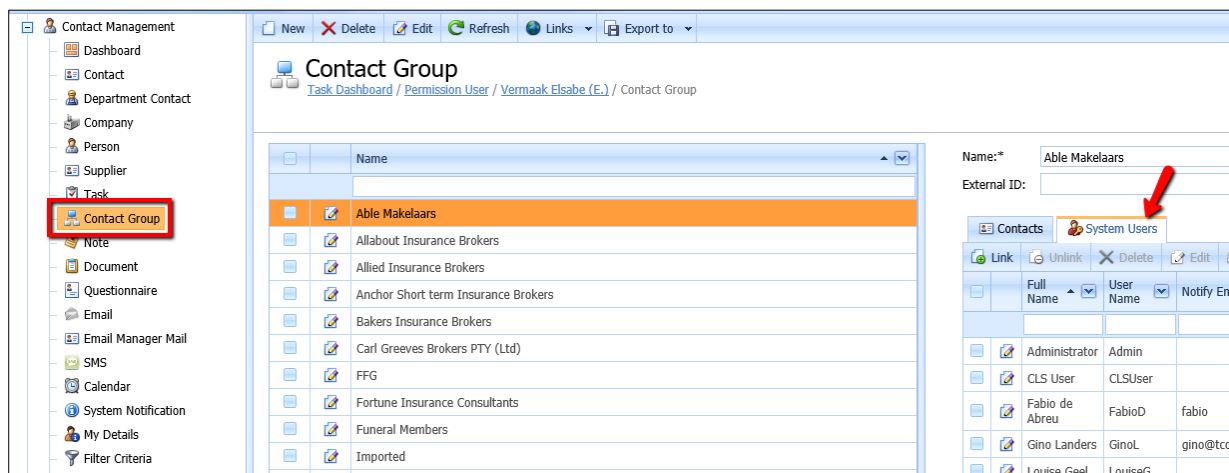
User Roles

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

User Permission Roles are setup 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 is 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 his/her own user profile to update i.e. Notification email, Reminder check time, Email Account and will also be able to change their own password.



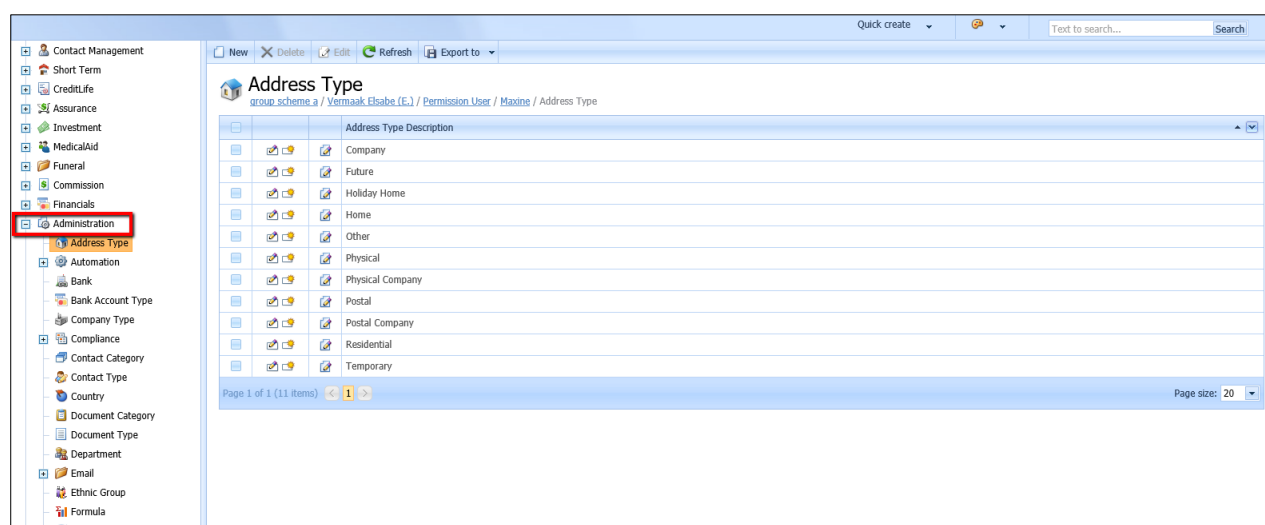
Administration

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

Setup drop-down menus for each of the below data fields, according to your Organizations 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
- Test Template
- Title

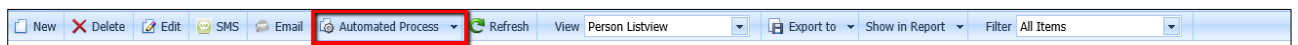
Automation

Automated Email, -File, -Report or -SMS Files can be setup to improve proficiency, uniformity, and timeous communication with less effort.

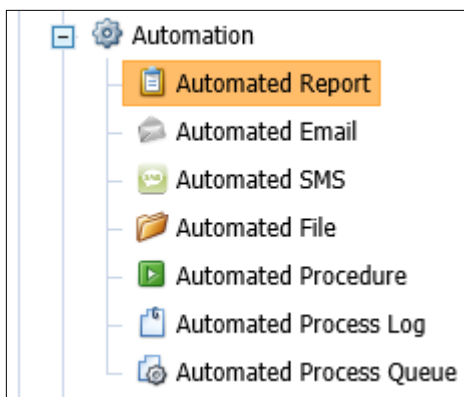
Although the full setup functionality is currently not available on Web, you are still able to view or edit certain fields.

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 setup 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

Setup a standardised email body with linked reports.



Automated Report Setup

Automated Report Setup
Message Body
Definition
Teams

Setup

System Area:*

Name:*

Email Account: N/A

Status: Development

Criteria:

☐ Inplace Process

☒ Use Temp Folder

Work Folder:*

Recipient Name:

Recipient Address:

Error reporting name

Display Name:*

Attach Document

☐ Attach Output ☐ Log Email To Recipient

Attachment Property:*

Reference:

Attachments

	Display Name	Export Format	Secured	Document Category	Document Type	Attach Output

Fieldname	Description	Required
System Area	Select the system area on which this process should be applicable	✓
Name	Provide a unique name for the automated 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	✓
Criteria	Apply specific filter criteria to this process if applicable	
In-place Process	Select In-place Process to make the automated process available on relevant views based on the selected report data.	
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 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

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:



Automated Report Setup Message Body Definition Teams

Email Subject:* Client Portfolio : <<FirstName>> <<Surname>>

Dear <<FirstName>>
Attached please find your latest Portfolio for save keeping
Regards

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

Definition

The Definition tab is used to describe the purpose and/or layout of this process.

Automated Report Setup Message Body Definition Teams

This process is used for sending Client Portfolios via email
Change Log:
• 27/06/2019 - Added POA Report to Process

Teams

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



Automated Report Setup		Message Body		Definition		Teams	
Link		Unlink		Edit			
☐		Name				▲ ▼	Last Assigned
☐		Back Office					
☐		Brokers					
☐		Commission					
☐		Compliance					
☐		The Test Team					Teessen Pieter (P.G.)

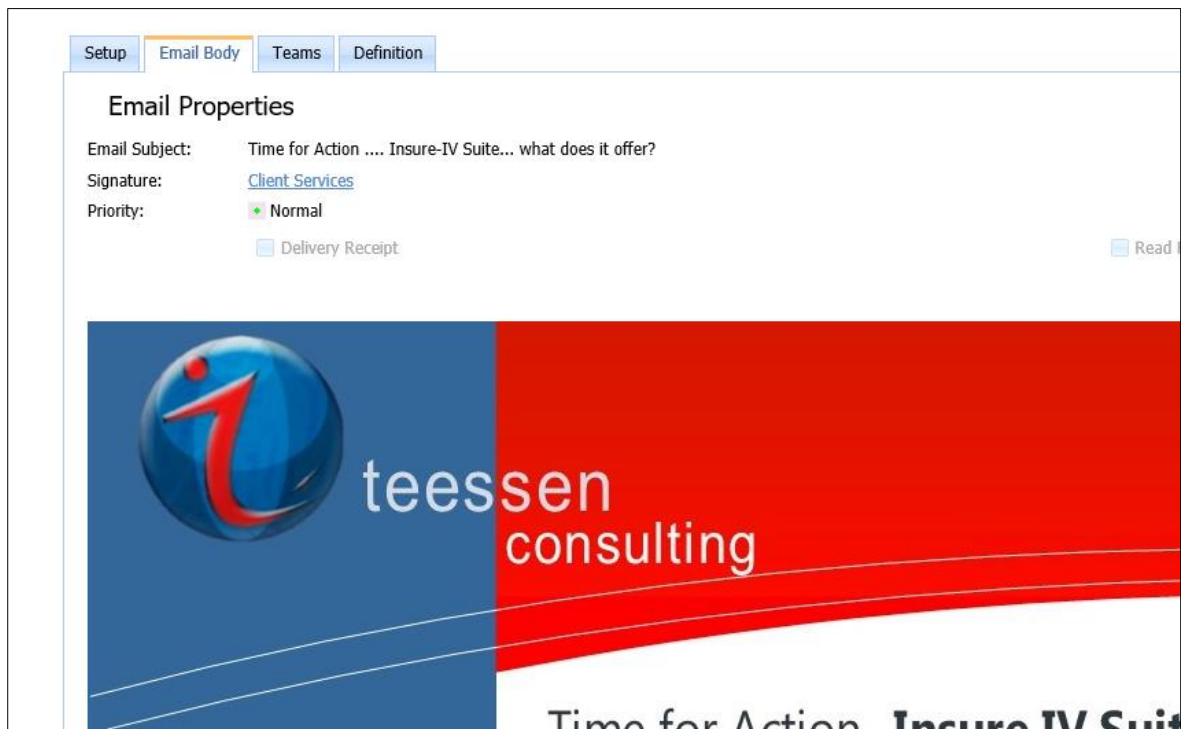
Automated email

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.

Setup		Email Body		Teams		Definition	
Setup				Error reporting name			
System Area:	Person			Display Name:*	Displayname		
Name:*	Request for personal information						
Status:	Production						
Criteria:							
☒ Inplace Process	Email Account:	Elsabe Ver					
☒ Log Email To Recipient							
Recipient Name:	Displayname						
Recipient Address:	Email						

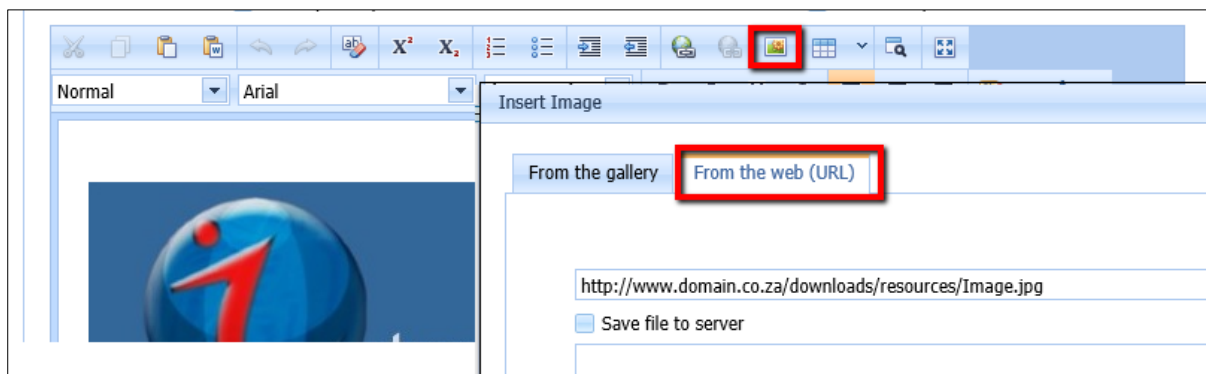
Fieldname	Description	Required
System Area	Select relevant system area. Criteria for Recipient Name and merged fields in email body are dependent on selected system area.	✓
Name	Descriptive name for email.	✓
Status	Status will default to Development and only be an active field for users once in Production	
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 into email body



Refer to Automated Report section for details on [Email body](#), [Team](#) and [Definition](#)

Automated SMS

Sending standardized bulk SMS with pre-populated script:



Setup Teams Definition

System Area: Person

SMS Subject:* Happy Birthday

Description:* Happy Birthday

Status: Production

Criteria:

☒ Inplace Process

Recipient:* Old

Recipient Number: CellNumber.CellNumber

Error reporting name

Display Name:* Displayname

Dear <<FirstName>> , Try and take it a little easier today. After all, it's your special day! Happy Birthday. MSB Brokers

Fieldname	Description	Required
System Area	Select criteria needed to setup merged fields.	✓
SMS Subject	Will be visible from the automated process drop-down menu.	✓
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 filter 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 setup 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 [Team](#) 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:



Setup

Definition

Teams

Report Data:

Credit Life Credit Control Cancelatio

Export Format:

Pdf

System Area:

Credit Life Policy

Secured

Name:*

Credit Life Credit Control Cancellation Repo

Production

Password:

Description:*

Credit Life Credit Control Cancellation Report

Single File

Criteria:

Filename:

Credit life cancellation report

☒ Inplace Process

File Path:

C:\Users\TCSUPW03\OneDrive - Teessen Consulting\Documents\TC

Attach Document

Error Reporting name

☒ Attach Output

Display Name:*

CancelDate

Attachment Property:*

Owner.Documents

Document Type:*

Estate Planning – Last Will & Testar

Document Category:*

Bond Cover

Reference:

ContractNumber

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 filter 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 [Team](#) 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:

- Short Term - CreditLife - Assurance - Investment - MedicalAid - Funeral - Commission - Financials - Administration - Address Type - Automation - Automated Email - Automated File - Automated Procedure Automated Process Log - Automated Report - Automated SMS - Automated Process Queue - Bank - Bank Account Type - Company Type - Compliance - Contact Category - Contact Type - Country - Document Category	Automated Process Log Task Dashboard / Automated Process Log				
	Drag a column header here to group by that column				
	Log Date	Automated Process	Import Log Type	System User	Log Message
	2017-08-29 11:29:31.5630 AM	Test PolicyCreditor	Information	System Administrator	Mail was send successfully to Plessis Johannes (J.P.J.D.)tian@tconsult.co.za)
	2017-08-29 11:29:31.5630 AM	Test CLP	Information	System Administrator	Mail was send successfully to Plessis Johannes (J.P.J.D.)tian@tconsult.co.za)
	2017-08-29 11:28:45.7800 AM	Credit LifePolicy Test	Information	System Administrator	Mail was send successfully to Mangoale Mosa (M.J.)tian@tconsult.co.za)
	2017-08-29 11:22:36.2900 AM	Credit LifePolicy Test	Error	System Administrator	System.Exception: System.Exception: System.Exception: System.Exception: System.Exception: Retrieving the COM class factory for component with CLSID {0006F03A-0000-0000-C000-000000000046} failed due to the following error: 80080005 Server execution failed (Exception from HRESULT: 0x80080005 (CO_E_SERVER_EXEC_FAILURE)). at TC.Contact.Core.CoreFunctions.SendMail(Session Session, EmailAccount EmailAccount, EmailSignature Signature, String Subject, String MessageBody, EmailPriority Priority, Boolean ReadReceipt, Boolean DeliveryReceipt, String SendTo, String CC, String BCC, ArrayList Attachments, String& ErrorMessage) in D:\Documents\Visual Studio 2015\Projects\TFS(2)\XAF\Insure-IV\Insure-IV\TC.Contact.Core\CoreFunctions.vb:line 2446 at TC.Contact.Core.CoreFunctions.SendMail(Session Session, EmailAccount EmailAccount, EmailSignature Signature, String Subject, String MessageBody, EmailPriority Priority, Boolean ReadReceipt, Boolean DeliveryReceipt, String SendTo, String CC, String BC

Open a specific log to view error message

Automated Process Log Task Dashboard / Automated Process Log / Automated Process Log	
Automated Process: Credit LifePolicy Test	Log Date: 2017-08-29 11:22:35.8870 AM
System User: System Administrator	Import Log Type: Error
Log Message: Mail sending to Desai Shilon Bianca Lesan Si-ane (S.B.L.S.D.)tian@tconsult.co.za) failed	

Automated Process Queue

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

Setup Queue Items	
Name:	Distribute Policy documents
	☒ Active Max Per Operation: 5
	☐ Recurring
Date Last Run:	23 February 2020 02:02 PM
Date Next Run:	24 February 2020 02:00 PM
Recurrence:	every day from 02:00 PM to 03:00 PM
Description:	Distributing policy documents



Fieldname	Description	Required
Name	Assign a unique name to the queue	✓
Active	Only active queue's 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 items need to be re-sent 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

Recurrence

☒ Daily

☐ Weekly

☐ Monthly

☐ Yearly

☒ No end date

☐ End after: 10 occurrences

☐ End by: 2019-11-15

Every 1 day(s)

Every weekday

OK

Cancel

Remove recurrence

View queue items

Setup

Queue Items

X Delete

Drag a column header here to group by that column

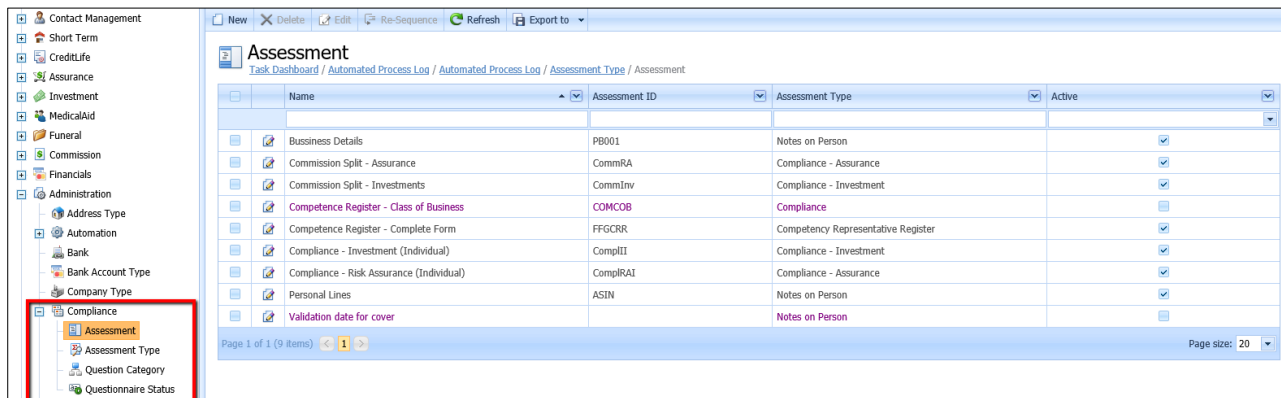
☐	Display Name	☒	Automated Process	☒	Date Processed	☒	Retries	☒	Status	☒	Email Sent	☒
									N/A			
☐	MSB Independent Broker Group (Pty) Ltd (ACC-SA202001-27)		Send Account Statement				0	Ready			☐	



Compliance

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

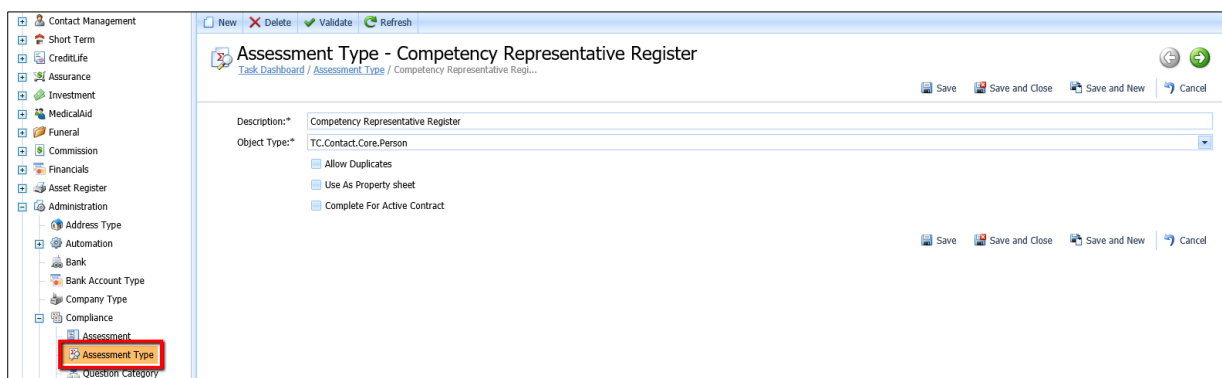
This information can be used in standard forms and reporting.



Name	Assessment ID	Assessment Type	Active
Business Details	PB001	Notes on Person	☒
Commission Split - Assurance	CommRA	Compliance - Assurance	☒
Commission Split - Investments	CommInv	Compliance - Investment	☒
Competence Register - Class of Business	COMCOB	Compliance	☐
Competence Register - Complete Form	FFGCR	Competency Representative Register	☒
Compliance - Investment (Individual)	ComplII	Compliance - Investment	☒
Compliance - Risk Assurance (Individual)	ComplRAI	Compliance - Assurance	☒
Personal Lines	ASIN	Notes on Person	☒
Validation date for cover		Notes on Person	☐

Assessment Type

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



Assessment Type - Competency Representative Register

Description: Competency Representative Register

Object Type: TC.Contact.Core.Person

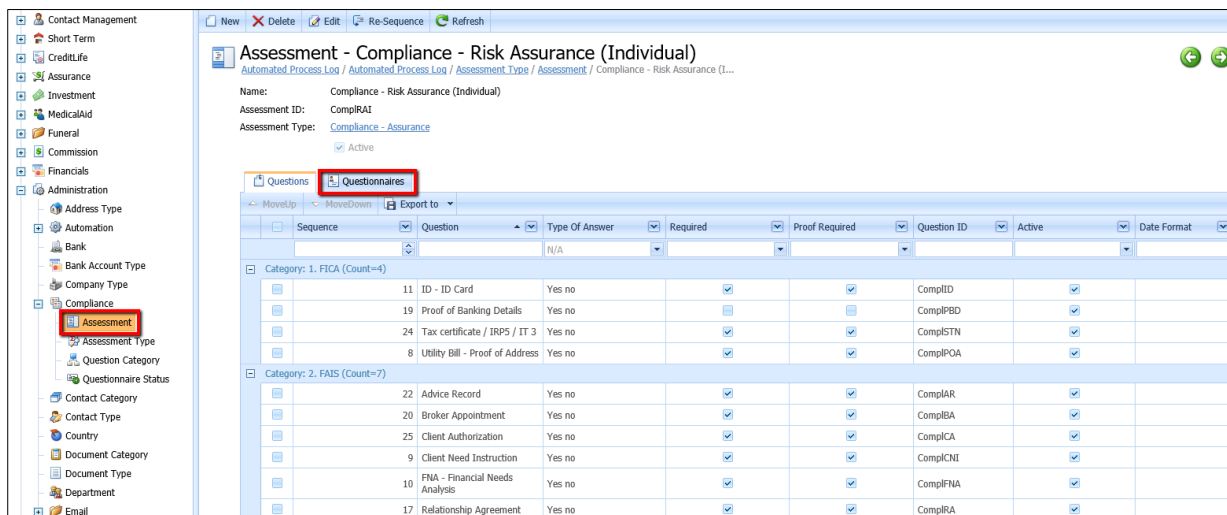
☐ Allow Duplicates

☐ Use As Property sheet

☐ Complete For Active Contract

Assessment

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



Assessment - Compliance - Risk Assurance (Individual)

Name: Compliance - Risk Assurance (Individual)

Assessment ID: ComplRAI

Assessment Type: Compliance - Assurance

☒ Active

Sequence	Question	Type Of Answer	Required	Proof Required	Question ID	Active	Date Format
Category: 1. FICA (Count=4)							
11	ID - ID Card	Yes no	☒	☒	CompID	☒	
19	Proof of Banking Details	Yes no	☒	☒	CompIPBD	☒	
24	Tax certificate / IRP5 / IT 3	Yes no	☒	☒	CompISTN	☒	
8	Utility Bill - Proof of Address	Yes no	☒	☒	CompIPOA	☒	
Category: 2. FAIS (Count=7)							
22	Advice Record	Yes no	☒	☒	ComplAR	☒	
20	Broker Appointment	Yes no	☒	☒	ComplBA	☒	
25	Client Authorization	Yes no	☒	☒	ComplCA	☒	
9	Client Need Instruction	Yes no	☒	☒	ComplCNI	☒	
10	FNA - Financial Needs Analysis	Yes no	☒	☒	ComplFNA	☒	
17	Relationship Agreement	Yes no	☒	☒	ComplRA	☒	

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

Questions

Questionnaires

Questionnaire

Re-Sync

Export to

Owner	Reference	Status	Total Questions	Completed Questions	Last Updated	Updated By
Legal Wise (Momentum - 12345)		In Progress	15	0	2018-05-08	Admin
Flynn Harry (H.J.) (FMI - MMI 362053)		In Progress	15	0	2019-01-22	Admin
Flynn Harry (H.J.) (Momentum Life - MMI 36524)		In Progress	15	0	2019-01-22	Admin
365 TRANSPORT SOLUTIONS (1-2-3 Marketing Corporation cc - 123885469)		In Progress	15	0	2018-05-08	Admin
ABELS C (C S) (Hollard - 201803153)		In Progress	15	0	2018-05-08	Admin
Meyer Ashley (A.) (Discovery - DISC983)		In Progress	15	0	2018-05-08	Admin
Insurance Co (Momentum - LFE89745)		In Progress	15	0	2018-05-08	Admin
Vermaak Elsabe (E.) (Discovery - 180508)		Complete	15	15	2018-05-14	System Administrator
Nqinata J (J) (Discovery - 201803154)		In Progress	15	0	2018-05-08	Admin

Page 1 of 1 (9 items)

Page size: 20

Formulate Questions

Assessment - Compliance - Risk Assurance (Individual)

[Automated Process Log](#) / [Assessment Type](#) / [Compliance](#) / [Assessment](#) / [Compliance - Risk Assurance \(1...](#)

Save Save and Close Save and New Cancel

Name:* Compliance - Risk Assurance (Individual)

Assessment ID: ComplRAI

Assessment Type:* Compliance - Assurance

☒ Active

Questions Questionnaires

New Delete Edit MoveUp

Sequence

Category: 1. FICA (Count=4)

		11
		19
		24
		8

Category: 2. FAIS (Count=7)

		22
		20
		25
		9

Assessment Question

Question:*

Sequence: 26

Type Of Answer:* Text

Specification List:* N/A

Category:* N/A

Date Format:*

☐ Proof Required

☐ Active

☐ Required

Question ID:

OK Cancel

Sequence	Description	Yes no					
26	Broker Appointment	Yes no	☒	☒	ComplBA	☒	
25	Client Authorization	Yes no	☒	☒	ComplCA	☒	
9	Client Need Instruction	Yes no	☒	☒	ComplCNI	☒	

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 need to be attached	
Question ID	Assign a unique Question ID for reporting purposes	
Active	Choose to activate question or not	



Specification list

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

Investments - Assessment Question

Question:* Investments

Sequence: 51

Type Of Answer:* List

Specification List:* Required / Not Required / Done

Category:* 5. Class of Business

Date Format:*

Question ID:

☐ Proof Required

☒ Active

☒ Required

OK Cancel

Specification List

New

req Search

Title
Proof Required
Required / Not Required / Done

Page 1 of 1 (2 items) Page size: 20

OK Cancel

Required / Not Required / Done - Specification List

Title:* Required / Not Required / Done

☐ Is System List

New Delete Edit Export to

Description	Translation 1	Translation 2
Done	Done	Done
Not Required	Not Required	Not Required
Required	Required	Required

Page 1 of 1 (3 items) Page size: 20

OK Cancel

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



Investments - Assessment Question

Question:* Investments

Sequence: 51

Type Of Answer:* List

Specification List:* Required / Not Required / Done

Category:* 5. Class of Business

Date Format:*

☒ Required

Question ID:

☐ Proof Required

☒ Active

Required - Specification List Value

Description:* Required

Translation 1: Required

Translation 2: Required

☒ Proof Required

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

Description	Claim Type	Default Template	Category Code
Death	TC.Contact.ExtendedServices.AssuranceClaim		LX
Death	TC.Contact.ExtendedServices.CreditLifeClaim		CLX
Death	TC.Funeral.FuneralClaim		FX
Dread Disease	TC.Contact.ExtendedServices.AssuranceClaim		LD
Dread Disease	TC.Contact.ExtendedServices.CreditLifeClaim		CLD
General Loss/Damage	InsureBaseIV.Claim		LX
Glass Damage	InsureBaseIV.Claim		LX
Jewellery	InsureBaseIV.Claim		
Loss of Income	TC.Contact.ExtendedServices.CreditLifeClaim		CLL
Permanent Disability	TC.Contact.ExtendedServices.CreditLifeClaim		CLP
Permanent Disability	TC.Contact.ExtendedServices.AssuranceClaim		LP
Property Loss/Damage	InsureBaseIV.Claim		
Public Liability	InsureBaseIV.Claim		
Temporary Disability	TC.Contact.ExtendedServices.CreditLifeClaim		CLT
Temporary Disability	TC.Contact.ExtendedServices.AssuranceClaim		LT
Vehicle Damage	InsureBaseIV.Claim	Additional Driver Details	
Vehicle Theft	InsureBaseIV.Claim		



Claims Category

Claim Category - Death
[Task Management](#) / [Dashboard](#) / [Claim Estimate Category](#) / [Claim Category](#) / [Death](#)

Save Save and Close Save and New Cancel

Description:* Death
 Claim Type:* TC.Contact.ExtendedServices.AssuranceClaim
 Default Template: N/A
 Category Code: LX

Causes

New Link Unlink Delete Edit

Description	Catastrophe	Police Information Required
Accidental	☐	☒
Cause unknown	☐	☒
Health Condition	☐	☐
Natural	☐	☐
Suicide	☐	☒
Unnatural	☐	☒

Page 1 of 1 (6 items) Page size: 20

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 that 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 therefor it is important to capture cause of claim first

Cause for Claim

Cause For Claim - Abdominal Pain
[Claim Estimate Category](#) / [Death](#) / [Claim Category](#) / [Cause For Claim](#) / [Abdominal Pain](#)

Save Save and Close Save and New Cancel

Description: Abdominal Pain
☐ Catastrophe
 Category: Permanent Disability
☐ Police Information Required

Create a list of claim causes which can be linked to a specific claims' category either directly from cause of claim or from claim 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

 **Claim Status - Payment Processing**

[Claim Category](#) / [Cause For Claim](#) / [Abdominal Pain](#) / [Claim Status](#) / Payment Processing

 Save  Save and Close  Save and New  Cancel

Claim Status

Description:*

☐ Reason Required

☐ Use As Default

☒ Allow Payment

Reason Code:*

☐ Is Final State

Claim Code:

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 setup.

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

Contact Management

Short Term

CreditLife

Assurance

Investment

MedicalAid

Funeral

Commission

Financials

Administration

Address Type

Automation

Bank

Bank Account Type

Company Type

Compliance

Contact Category

Contact Type

Country

Document Category

Document Type

Department

Email

Ethnic Group

New

Delete

Edit

Refresh

Export to

Document Category

Compliance - Risk Assurance (14) / Assessment / Competence Register - Complete... / Questionnaire Status / Document Category

	Description	Confidentiality Level
	Attachment	N/A
	Bond Cover	None
	Credit Life Cover	None
	Email Attachment	None
	Estate Planning	None
	FICA	None
	Funeral Cover	None
	Life Cover	None
	Orphan	None
	Payment File	None
	Policy Schedules	None
	ROA	None
	Task Attachment	None
	Un-Allocated	None

Page 1 of 1 (14 items)

1

Page size: 20



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.

Document Type
Task Dashboard / Document Type / Document Type

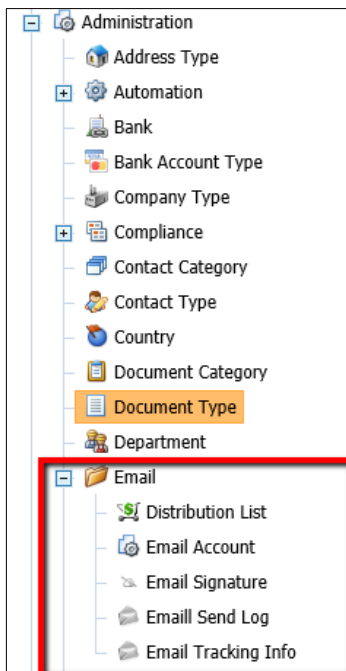
Save Save and Close Save and New Cancel

Description:*
Save Location:* Database
Default Category: N/A
Filter:
☐ Allow For Upload
☐ Use As Default
☒ Active
Expire Months: 60
☐ Is System

Fieldname	Description	Required
Description	Describe the document type	
Save Location	Select location as either Database, Sharepoint, Network or Azure	
Default Category	Assign a default category per document type	
Filter	Filter specifies the format in which a document must be saved in order 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

Setup standardised distribution lists. Manage Email accounts to be used throughout the application in various processes. Setup 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.

Select 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.



The screenshot shows the 'Distribution List Members' management interface. At the top, there's a toolbar with actions like New, Link, Unlink, Delete, Edit, Automated Process, and Export to. Below this is a table of distribution list members. A 'New' button is highlighted with a red box. A modal window for adding a new member is open, showing fields for Recipient, Distribution List, Date Added, and Added By. A red arrow points to the 'Add' button in the modal. An 'Email Recipient' table is also visible, listing contacts with their names and email addresses.

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 sent to members of a Distribution list, the system area for the automated email needs to be 'Distribution list member'.

The screenshot shows the 'Automated Email - Send Email Invite' setup screen. The 'System Area' dropdown is highlighted with a red box and set to 'Distribution List Member'. The 'Name' field is set to 'Send Email Invite'. The 'Error reporting name' field is set to 'Recipient.DisplayName'. The 'Email Account' is set to 'Outlook Mail'.

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

The screenshot shows the 'Email Properties' setup screen. The 'Email Subject' is 'Test', 'Signature' is 'Client Services', and 'Priority' is 'Normal'. The 'Delivery Receipt' checkbox is checked. The email body text is 'Dear <<Recipient.DisplayName>> Please follow-up'.



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:

The screenshot shows the 'Distribution List - Weekly Email' form. At the top, there are navigation links: [Contact](#) / [Automated Email](#) / [Send Email Invite](#) / [Distribution List](#) / [Weekly Email](#). Below these are buttons: [Save](#), [Save and Close](#), [Save and New](#), and [Cancel](#). The form fields include: Name: Weekly Email, Date Last Updated: 2018-05-28, Active: ☒, Member Count: 3, and Updated By: Maxine. Below these is a section titled 'Distribution List Members' with a table. The table has columns: Recipient, Email, Date Added, and Added By. The 'Automated Process' button is highlighted with a red box. The table contains three rows of data:

Recipients	Email	Date Added	Added By
1-2-3 Marketing Corporation cc	123@mc.co.za	2016-10-27	Administrator
22Nd On North Guest House	info@22north.co.za	2016-10-19	System Administrator
Flynn Harry (H.J.)	flynnharry@gmail.com	2018-11-14	Shamieah Jacobs

Page 1 of 1 (3 items) | Page size: 20

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.

The screenshot shows the 'Email Account' form. At the top, there are navigation links: [Task Dashboard](#) / [Email Account](#) / [Email Account](#). Below these are buttons: [New](#), [Delete](#), [Validate](#), [Test Email Settings](#), and [Refresh](#). The form fields include: Name:*, Email Type: SMTPMail, Host:*, Port: 0, User Name:*, Password:*, Enable SSL: ☒, BCC Email:*, Service Point Max Idle Time: 0, and Active: ☒. At the bottom right are buttons: [Save](#), [Save and Close](#), [Save and New](#), and [Cancel](#).

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 Organizations network.

Outlook Mail

When selected the application will use the settings from your outlook account provided you are on your Organizations network.



Database mail

Database mail is used to send bulk emails, e.g. Marketing material or Newsletters and setup 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.

Use the image icon on Body section to insert the selected Logo 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.

	Map Name	Map Type	Map Reference	Header Row Count	Import To Temp Tables	Has Column Headers	Is Active
☐	Admin + Cellphone Insurance Client list	TCImportInterface.ContactImporter, TCImportInterface		0	☒	☒	☒
☐	Administratin Plus Client list	TCImportInterface.ContactImporter, TCImportInterface		0	☒	☒	☒
☐	Approach	TCImportInterface.CommissionContractImporter, TCImportInterface		0	☐	☐	☐
☐	Approach Discovery Health	TCImportInterface.CommissionImporter, TCImportInterface	Creditor recon	31	☐	☒	☒
☐	Bank Statement	TCImportInterface.BankStatementImporter, TCImportInterface		0	☐	☐	☒
☐	Cadiz Commission Map	TCImportInterface.CommissionImporter, TCImportInterface	Cadiz Commission	0	☐	☒	☒
☐	CIMS Short term policies	TCImportInterface.ShortTermPolicyImporter, TCImportInterface		0	☐	☒	☒
☐	Contact Imporeter	TCImportInterface.ContactImporter, TCImportInterface		0	☐	☒	☐
☐	Cosmo	TCImportInterface.AssuranceCreditLifePolicyImporter, TCImportInterface		0	☐	☐	☐
☐	Credit Life Policy Creditor Importer	TCImportInterface.CreditLifePolicyCreditorImporter, TCImportInterface		1	☐	☒	☒
☐	Credit Life Policy Payment Importer	TCImportInterface.CreditLifePolicyPaymentImporter, TCImportInterface		5	☐	☒	☒
☐	Debit order unmet	TCImportInterface.EscapeUnmetImporter, TCImportInterface		0	☐	☒	☒
☐	Discovery Health Map	TCImportInterface.CommissionImporter, TCImportInterface		0	☐	☒	☐
☐	Discovery Life	TCImportInterface.CommissionImporter, TCImportInterface		11	☐	☒	☒
☐	Discovery Life 4	TCImportInterface.CommissionImporter, TCImportInterface		11	☐	☒	☒
☐	Discovery Life Map	TCImportInterface.CommissionImporter, TCImportInterface		0	☐	☒	☐
☐	Discovery Life3	TCImportInterface.CommissionImporter, TCImportInterface		11	☐	☒	☒
☐	FPG Kontak	TCImportInterface.ContactImporter, TCImportInterface		1	☒	☒	☒



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.



Map Details **File Culture**

File List Separator:

File Date Format:

File Decimal Separator:

Properties

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

New Delete Validate **Auto Populate Properties** Refresh

Excel XML Map - Contact Importer

Task Dashboard / Credit Life Product / Admin + Telephone Insurance CL... / Excel XML Map / Contact Importer

Save Save and Close Save and New Cancel

Map Details **File Culture**

Map Name:* Contact Importer Map Type:* TCImportInterface.ContactImporter, TCImportInterface

Header Row Count:* 0 Internal Processor: Excel

☒ Has Column Headers Map Reference:

☒ Generate Error File

☒ Validate On Import Specification: [Recipient & Contact Import.xlsx](#) ☒ Is Active

☒ Import To Temp Tables [Populate Column Headers](#)

Properties Configuration Properties

New Delete Edit Export to

Property Name	Data Type	Required	Property Type	Source	Destination Index	Column Header Name	Error Message
BANK ACCOUNT HOLDER	STRING	☐	Excel XML Column Property	{N}	42	Tax Number	
BANK ACCOUNT NUMBER	STRING	☐	Excel XML Column Property	{O}	41	"Bank Account	
BANK ACCOUNT TYPE	STRING	☐	Excel XML Column Property	{P}	40	Account Holder"	
BANK BRANCH CODE	STRING	☐	Excel XML Column Property	{R}	39	Account Number"	
BANK BRANCH NAME	STRING	☐	Excel XML Column Property	{S}	38	"Bank Account	
BANK NAME	STRING	☐	Excel XML Column Property		37		

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.

SURNAME / REGISTRATION NAME - Excel XML Column Property

Property Name:* SURNAME / REGISTRATION NAME

Data Type: STRING ☒ Required

Property Type: Excel XML Column Property

Source: {E}

Column Header Name:

Destination Index: 6 ☒ Trim Data

Expression:

Property Description: For a person record this will be the persons surname, for Company this will be the company's Registration Name.

OK Cancel

Please use the property description as guidance.



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

Map Details

Map Name:* Admin + Cellphone Insurance Client list

Header Row Count:* 0

☒ Has Column Headers

☒ Generate Error File

☒ Validate On Import

☒ Import To Temp Tables

Map Type:* TCImportInterface.ContactImporter, TCImportInterface

Internal Processor: Document Server

Map Reference:

☒ Is Active

Specification: Administratin Plus Client list.xlsx

Select the applicable file from your File Explorer.

Map Type:* TCImportInterface.ContactImporter, TCImportInterface

Internal Processor: Document Server

Map Reference:

☒ Is Active

Specification: Browse...

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.

Excel XML Map - Contact Importer

Task Dashboard / Credit Life Product / Admin + Cellphone Insurance Client list / Excel XML Map / Contact Importer

Save Save and Close Save and New Cancel

Map Details

Map Name:* Contact Importer

Header Row Count:* 0

☒ Has Column Headers

☒ Generate Error File

☒ Validate On Import

☒ Import To Temp Tables

Map Type:* TCImportInterface.ContactImporter, TCImportInterface

Internal Processor: Excel

Map Reference:

☒ Is Active

Specification: Recipient & Contact import.xlsx

Populate Column Headers

Configuration Properties

Property Name	Data Type	Required	Property Type	Source	Destination Index	Column Header Name	Error Message
PHYSICAL ADDRESS LINE 1	STRING		Excel XML Column Property	{AG}	30	Work Number	
BANK ACCOUNT HOLDER	STRING		Excel XML Column Property	{N}	42	Tax Number	
SURNAME / REGISTRATION NAME	STRING	☒	Excel XML Column Property	{A}	6	Surname	
GENDER	STRING		Excel XML Column Property	{AM}	17	Product Provider client code	
FIRST NAME / TRADING NAME	STRING	☒	Excel XML Column Property	{B}	7	First name	
PHYSICAL CODE	STRING		Excel XML Column Property	{AK}	36	Employer*	
TITLE	STRING		Excel XML Column Property	{AF}	11	Contract Type	

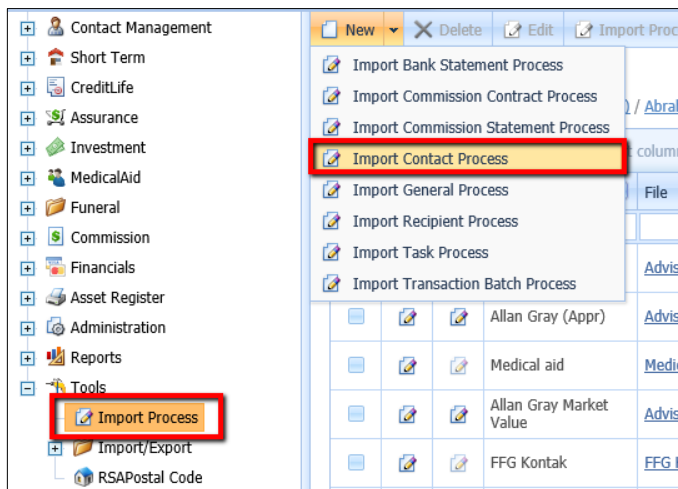
Configuration Properties

Configuration properties indicates whether this map is used for an Investment Statement and/or if Vat is added to the selected commission amount.

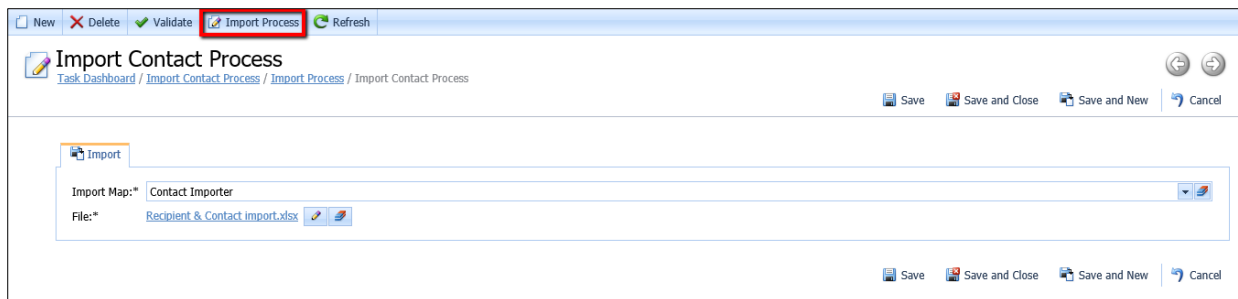
Configuration properties can only be set up and changed on Desktop application

Importing data

Please refer to [Tools](#) section in this manual.



Select the file and map to be used for your import



Save your process and choose Import Process

The imported data will no reflect in the area e.g. Contact which you selected

Specialised 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

Setup 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

Link Group - Online Forms

Permission User / Vermaak Elsabe (E.) / Contact Group / Link Group / Online Forms

Save Save and Close Save and New Cancel

Group Name:* Online Forms

Sort Order:* 0

☒ Active

Links

	Link Name	URL	Sort Order	Push Data	System Area	Active
☐	Client Contact Form	https://www.cognitofrms.com/TeessenConsulting/TeessenConsultingContactForm	0	☒	Person	☒
☐	Client Needs Analysis	https://www.cognitofrms.com/TeessenConsulting/ClientNeedsAnalysis	0	☒	Person	☒
☐	Request for Quote - Medical Aid / Insurance	https://www.cognitofrms.com/TeessenConsulting/RequestForQuoteMedicalAidInsurance	2	☒	Medical Aid Policy	☒

Page 1 of 1 (3 items) Page size: 20

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.

New Create Lead Clone... Delete Edit SMS Email Automated Process Refresh View Person Listview

Links

General

Online Forms

Client Contact Form

Client Needs Analysis

Person

Vermaak Elsabe (E.) / Contact Group / Link Group / Online Forms / Person

Drag a column header here to group by that column

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 i.e. 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 in i.e. Online forms.

Discovery - Links

Clone...

Group:* Commission

Link Name:* Discovery

URL:* https://id.discovery.co.za/Account/Login?ReturnUrl=%2Fconnect%2Fauthorize%2Fcallback

Sort Order:* 0

☒ Active ☐ Is Admin

☒ Push Data ☐ Embed

Links will only be displayed as embedded web pages on the web application

System Area:* Bank Statement Transaction

Add Merge Field: Add Values from Questionnaires:

Data:

OK Cancel



Embedded links will open within the application and not open a separate web page

Client Needs Analysis - Links

Clone...

Link Name:* Client Needs Analysis

URL:* https://www.cognitoforms.com/TeessenConsulting/ClientNeedsAnalysis

☒ Active Sort Order:* 0

☒ Push Data

System Area:* Person

Add Merge Field: Add Values from Questionnaires:

Data: ?entry={\"Name\": {\"Prefix\": \"<<Title.TitleDescription>>\", \"First\": \"<<FirstName>>\", \"Middle\": \"<<SecondName>>\", \"Last\": \"<<Surname>>\"}}

OK Cancel

Please contact us to setup Data criteria

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

Product

Setup Cancellation Reasons, Contract Roles and Product Statuses' to be selected throughout the application.

Cancellation Reason

Setup various cancellation reasons per Contract Type which can be select when Contract status is in Final state i.e. Cancelled.

Cancellation Reason - Cancelled

Automated Process Queue / Claims Recurring - Account / Account / Cancellation Reason / Cancelled

Save Save and Close Save and New Cancel

Reason Description:* Cancelled

Reason Code:

Contract Type:* TC.Contact.ExtendedServices.CreditLifePolicy

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 setup 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

Setup 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 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 e.g. process commission can be done. 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 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



User Activity Log						
Contact Importer / Contact / Person / Import Process / User Activity Log						
Drag a column header here to group by that column						
☐ User Name	☐ Application Type	☐ Source	☐ Action	☐ Description	☐ Date Created	
☐ admin	WebApplication	102.250.1.47	Logged On	User admin has successfully logged on at 2019-06-07 03:46:15 PM on DB: Insure_IV_Test	2019-06-07	
☐ admin	WebApplication	102.250.1.107	Logged Off	User admin has successfully logged Off at 2019-06-07 03:52:15 PM on DB: Insure_IV_Test	2019-06-07	
☐ Admin	WebApplication	105.246.74.167	Logged On	User Admin has successfully logged on at 2019-07-03 04:43:20 PM on DB: Insure_IV_Test	2019-07-03	
☐ Admin	WebApplication	41.13.32.20	Logged Off	User Admin has successfully logged Off at 2019-07-09 01:07:09 PM on DB: Insure_IV_Test	2019-07-09	
☐ Admin	WebApplication	105.246.74.167	Logged Off	User Admin has successfully logged Off at 2019-07-03 04:45:18 PM on DB: Insure_IV_Test	2019-07-03	
☐ Admin	WebApplication	41.13.32.20	Logged On	User Admin has successfully logged on at 2019-07-09 01:23:08 PM on DB: Insure_IV_Test	2019-07-09	
☐ Admin	WebApplication	41.13.32.20	Failed Attempt	Login Failed for user Admin at 2019-07-09 12:57:25 PM on DB: Insure_IV_Test	2019-07-09	
☐ Admin	WebApplication	41.13.32.20	Logged On	User Admin has successfully logged on at 2019-07-09 12:57:31 PM on DB: Insure_IV_Test	2019-07-09	
☐ Admin	WebApplication	41.13.32.20	Logged On	User Admin has successfully logged on at 2019-07-09 01:27:13 PM on DB: Insure_IV_Test	2019-07-09	
☐ Admin	WebApplication	41.13.32.20	Logged Off	User Admin has successfully logged Off at 2019-07-09 12:17:54 PM on DB: Insure_IV_Test	2019-07-09	
☐ Admin	WebApplication	105.246.65.124	Failed Attempt	Login Failed for user Admin at 5/30/2018 2:27:14 PM on DB: Insure_IV_Test	2018-05-30	
☐ Admin	WebApplication	41.13.32.20	Logged On	User Admin has successfully logged on at 2019-07-09 01:08:44 PM on DB: Insure_IV_Test	2019-07-09	
☐ Admin	WebApplication	41.13.32.20	Logged On	User Admin has successfully logged on at 2019-07-09 01:05:38 PM on DB: Insure_IV_Test	2019-07-09	
☐ Admin	WebApplication	105.246.67.201	Logged On	User Admin has successfully logged on at 2018-05-15 02:02:05 PM on DB: Insure_IV_Test	2018-05-15	
☐ Admin	WebApplication	41.13.32.20	Logged Off	User Admin has successfully logged Off at 2019-07-09 01:04:12 PM on DB: Insure_IV_Test	2019-07-09	

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

Calendar Resource

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

Calendar Resource Task / Calendar / Calendar Resource / Vermaak Elsabe (E.) / Calendar Resource		Save Save and Close Save and New Cancel
Calendar Resource		
System User:	N/A	Outlook Username:
Caption:		Outlook Calendar:
Color:	0;0;0	

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 within 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.



Team - Claim Admin
Task Dashboard / Team / Claim Admin

Save Save and Close Cancel

Name:* Claim Admin

Last Assigned: N/A

Members Task Types Reports Automated Processes

Edit Refresh User Full Name

Full Name	User Name	Win	Web

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 e.g. Control the transition of Contract Statuses with build-in security controls.

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

State Machine - Task Status
Task Dashboard / State Machine / Task Status

Active

Name: Task Status

Target Object Type: Task

Start State: InProgress

States

- Caption
- Cancelled
- Completed
- Deferred
- InProgress
- NotStarted
- WaitingForSomeoneElse

Page 1 of 1 (6 items)

NotStarted - State

Caption: NotStarted

Marker: NotStarted

Target Object Criteria:

Task status Not Started can only Transition to Cancelled or In Progress

Caption	Target State	Index	Save And Close View
Cancelled	Cancelled	1	
InProgress	InProgress	0	

Page 1 of 1 (2 items)

Page size: 20



Completed - State

Caption:* Completed

Marker: Completed

Target Object Criteria:

And

Percentage Complete Equals 100.00%

Transitions Appearance

New Delete Edit

	Caption	Target State	Index	Save And Close View
	InProgress	InProgress		

Page 1 of 1 (1 items) 1 20

Task status can only be changed to Completed if Percentage Complete equals 100%

Completed can only Transition back to In Progress

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

Task Management

Dashboard

Contact

Department Contact

Company

Person

Supplier

Task

Contact Group

Note

Document

Task

New File Task UnFile Task Forward Task Schedule Task Clone... Delete Edit InProgress Cancelled Automated Process Add Note

Task

Task Dashboard / State Machine / Task Status / Task

Drag a column header here to group by that column

	Task Number	Contact	Contract	Type	Subject	Date Created	Start Date	Due Date	Status
	TC-EVX202005-11	Vermaak Elsabe (E.)	Vermaak Elsabe (E.) (Holland - 160719)	Commission query	Query on contract 160719	2020-05-05			NotStarted
	TC-EVX202005-10	Vermaak Elsabe (E.)	Vermaak Elsabe (E.) (Discovery - 180508)	Compliance	Outstanding Compliance	2020-05-04	2020-05-04		InProgress

Task Type, Task log type & Text Templates

Task Management is a very prominent feature within the application and therefore 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

Task Type - New Business

[Task Dashboard](#) / [Task Type](#) / [New Business](#)

Save Save and Close Save and New Cancel

Description:* New Business Cost: R 0.00

Code: NBW Duration(Minutes): 0

Default Template: N/A 0 hours and 0 minutes.

☒ Active

Task Log Types

New Link Unlink Delete Edit Process Debit

Description	Code	Active	Default Template	Cost	Duration	Full Duration	Is System
Application Submitted	AS	☒		R 0.00	0	0 hours and 0 minutes.	☐
Brokers Note	BN	☒		R 0.00	0	0 hours and 0 minutes.	☐
New Business Issued	NBI	☒		R 0.00	0	0 hours and 0 minutes.	☐
New Business Submitted	NBS	☒	New Business Submitted	R 0.00	0	0 hours and 0 minutes.	☐

Page 1 of 1 (4 items) Page size: 20

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	Will only be visible once active	
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.

Task Log Type

Task Type: N/A Cost: R0,00

Description:* Duration: 0

Code: Full Duration: 0 hours and 0 minutes.

☒ Active ☐ Is System

Default Template: N/A

Teams

Link Unlink Delete Edit Export to

Name	Last Assigned
No data to display	

- Task log types can be independent from a task type. These task log types are then “universal” and available on any task type.
- Task log types linked to a specific task type will only be available on that specific task type.
- 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.

Text Template - New Business Submitted
[Task Dashboard](#) / [Task Type](#) / [New Business](#) / [Text Template](#) / New Business Submitted

Name:*

☒ Is Active

System Area:

Rich text editor toolbar: Normal, Arial, (Font Size), B, I, U, S, [List Icons], [Link Icon], [Image Icon], [Table Icon], [Fullscreen Icon]

Text area content:
Dear <<ReportedBy.DisplayName>>
New Business for <<Contact.Displayname>> submitted as requested
Regards

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.

Please contact us to set up merge fields on Web application.



TC-EVXX201906-2 : New Once-Off Cover - Send E-Mail from Task

To:* Vermaak Elsabe (E.)(elsabe@tconsult.co.za)  

CC:  

BCC:  

Log Type:* New Business Submitted   Priority: Normal 

Signature:* Client Services   Minutes Spent: 0  

Subject:* TC-EVXX201906-2 : New Once-Off Cover

Confidentiality Level: None 

Attachment: N/A   

☐ Read Receipt ☐ Delivery Receipt

 Insert Template

       X² X₂                           

Normal  Arial  (Font Size)  B I U                             

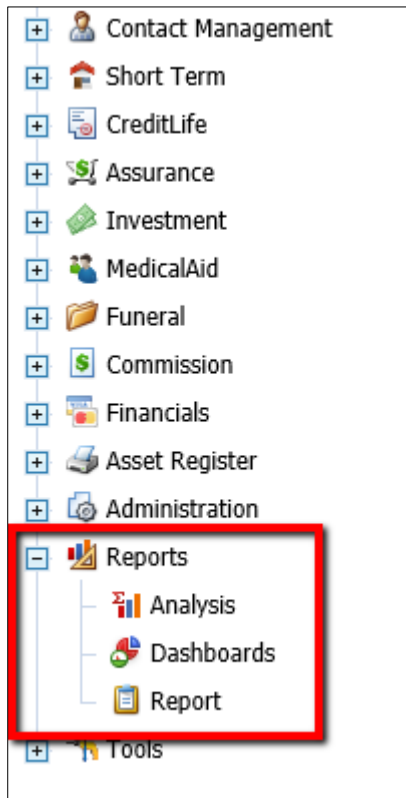
A 

Dear <<ReportedBy.DisplayName>>
New Business for <<Contact.Displayname>> submitted as requested
Regards

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:

Drop Filter Fields Here	
Drop Data Items Here	Drop Column Fields Here
Drop Row Fields Here	Grand Total
Grand Total	

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 the '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.



New

Delete

Bind Analysis Data

Refresh

Export Analysis to

Analysis

Task Type / Text Template / Additional Driver Details / Analysis / Analysis

Save

Save and Close

Save and New

Cancel

Name:

Data Type:

Criteria:

Pivot

Chart

Drop Filter Fields Here

Drop Data Items Here

Drop Row Fields Here

Grand Total

Drop Column Fields Here

Grand Total

Analysis - Client Demographics

[Task Dashboard](#) / [Analysis](#) / Client Demographics

Save Save and Close Save and New Cancel

Name: Client Demographics

Data Type: Person

Criteria:

Pivot Chart

Drop Filter Fields Here	
Drop Data Items Here	Drop Column Fields Here
Drop Row Fields Here	Grand Total
Grand Total	

Save Save and Close Save and New Cancel

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:



Analysis - Client Demographics

[Task Dashboard](#) /
 [Analysis](#) /
 Client Demographics







Name:

Data Type:

Criteria:

Pivot

Chart

Page 1 of 3 (30 items)

Correspondance Address.City	False	True	Grand Total
Athlone	57 553	260 217	317 770

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.



Name: Client Demographics
Data Type: Person
Criteria:

Pivot Chart

Page 1 of 3 (30 items) 1 2 3

Second Name Call Name Initials Date Of Birth Home Number Title Nationality Ethnic Group Marital Status First Name IDNumber Passport Number

Age Is Male

Correspondance Address.City	False	True	Grand Total
	57 553	260 217	317 770
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
Grand Total	58 752	260 883	319 635

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:

Name: Client Demographics
Data Type: Person
Criteria:

Pivot Chart

Page 1 of 3 (30 items) 1 2 3

Second Name Call Name Initials

Age

Correspondance Address.City

Athlone

Benoni

Beyers Park

Boksburg

Butlers

Cape Town

Centurion

Chatsworth

Darling

Grand Total

53

58

40

37

46

58 752

260 883

319 635

317 770

28

54

62

52

53

253

40

37

46

Visual Text

And

Age is greater than 30

OK Cancel



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

Analysis - Client Demographics
Task Dashboard / Task / TC-201511-1 / Analysis / Client Demographics

Save Save and Close Save and New Cancel

Name: Client Demographics
Data Type: Person
Criteria:

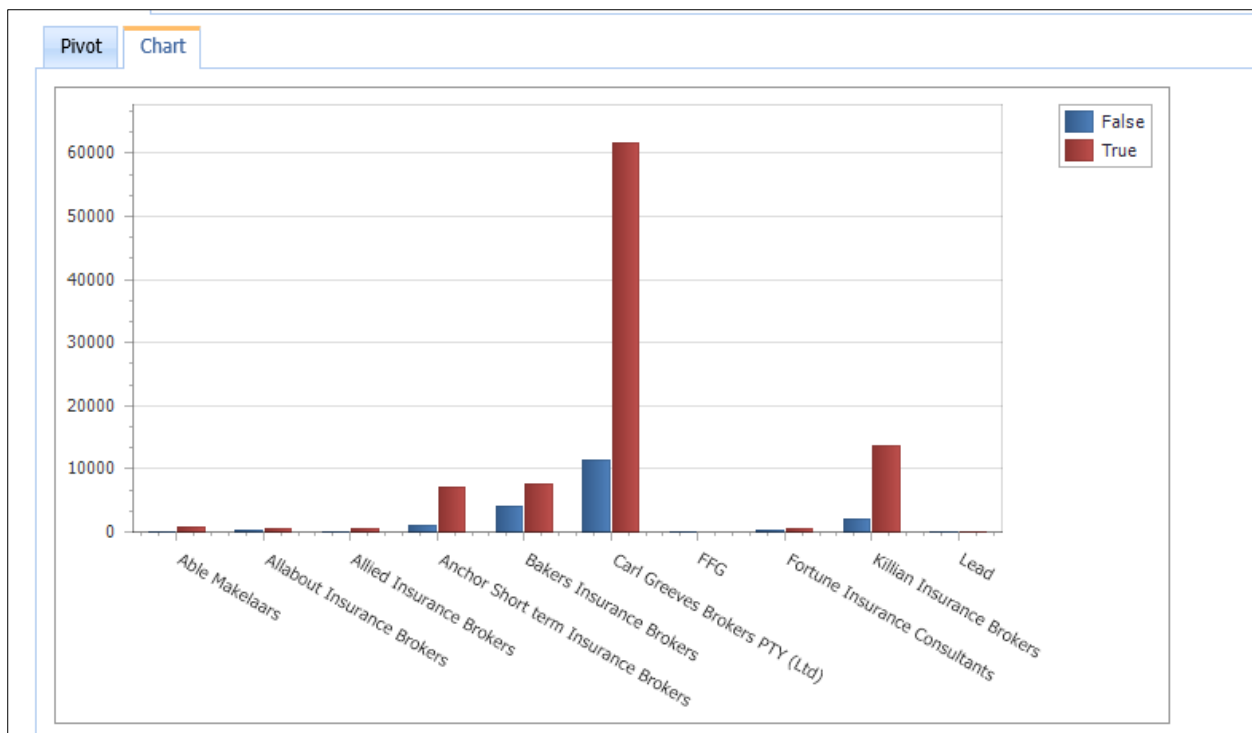
Pivot **Chart**

Page 1 of 2 (16 items) 1 2 >

Displayname Correspondance Address String Old Correspondance Address Surname Main Physical Address Occupation

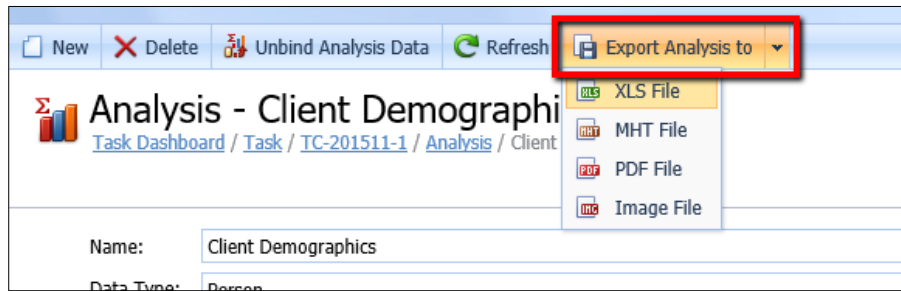
Age Is Male

Group	False	True	Grand Total
Able Makelaars	58	762	820
Allabout Insurance Brokers	144	434	578
Allied Insurance Brokers	66	486	552
Anchor Short term Insurance Brokers	926	7 038	7 964
Bakers Insurance Brokers	4 122	7 471	11 593
Carl Greeves Brokers PTY (Ltd)	11 470	61 525	72 995
FFG	68		68
Fortune Insurance Consultants	175	507	682
Killian Insurance Brokers	1 909	13 643	15 552
Lead	19	85	104





Your analysis report can be exported in various formats:

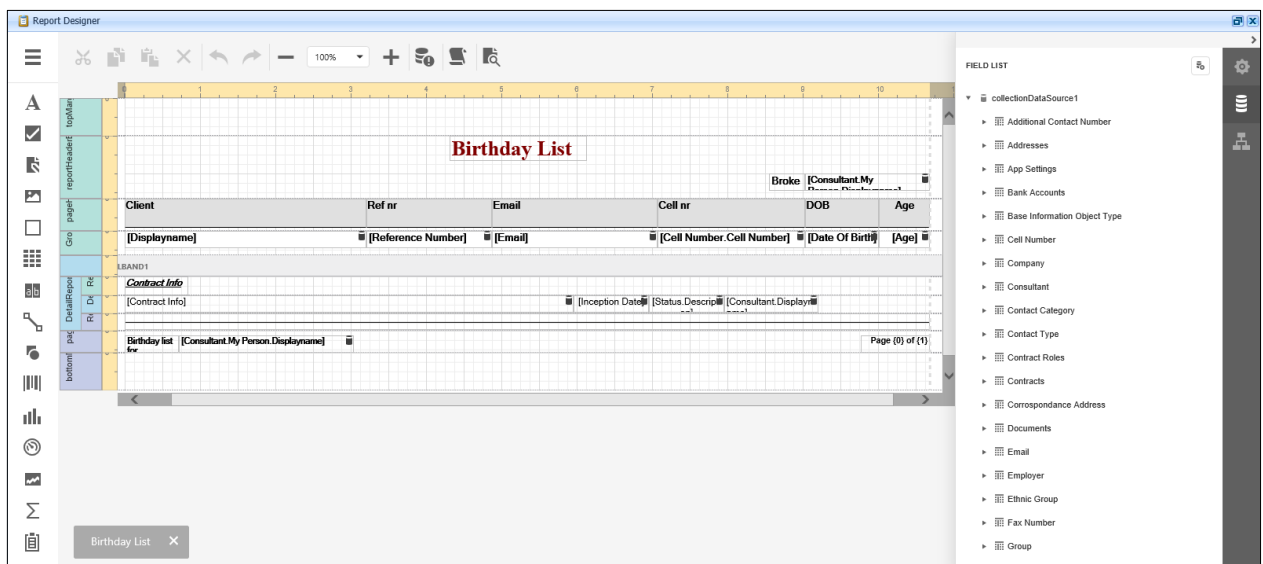
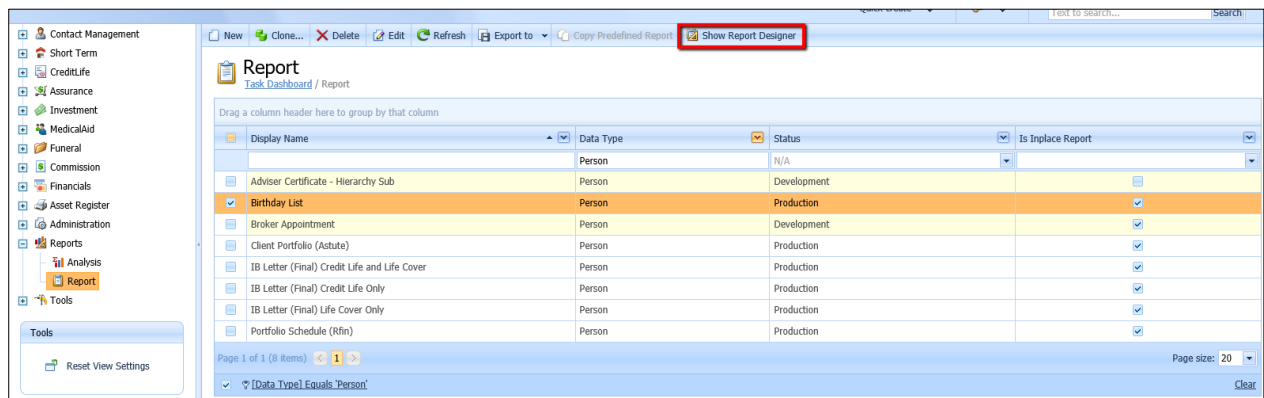


Dashboards

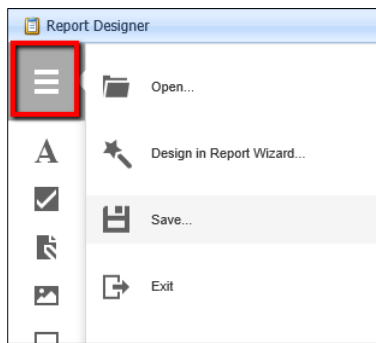
Please contact us to set up required Dashboards.

Standard Report

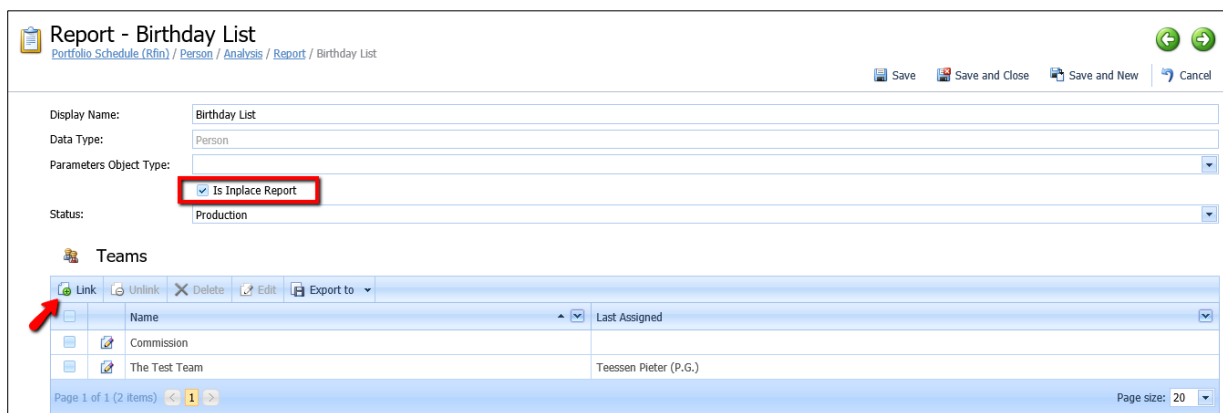
A standard report can be edited using the 'Show Report Designer' action.



Save changes by selection the Menu bar

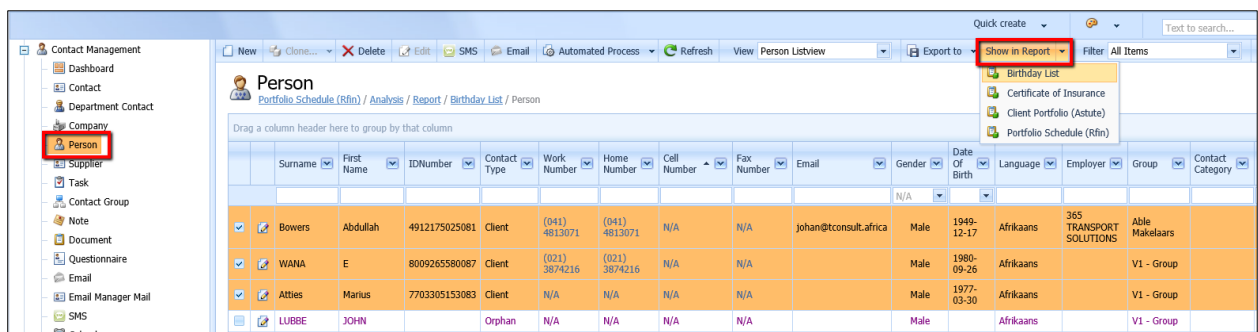


To make this report available as an 'In Place report', i.e. report will be available on specific data views based on selected data type, choose the edit icon on the toolbar:



Mark the report as 'Is In place Report' and link the relevant Group 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.

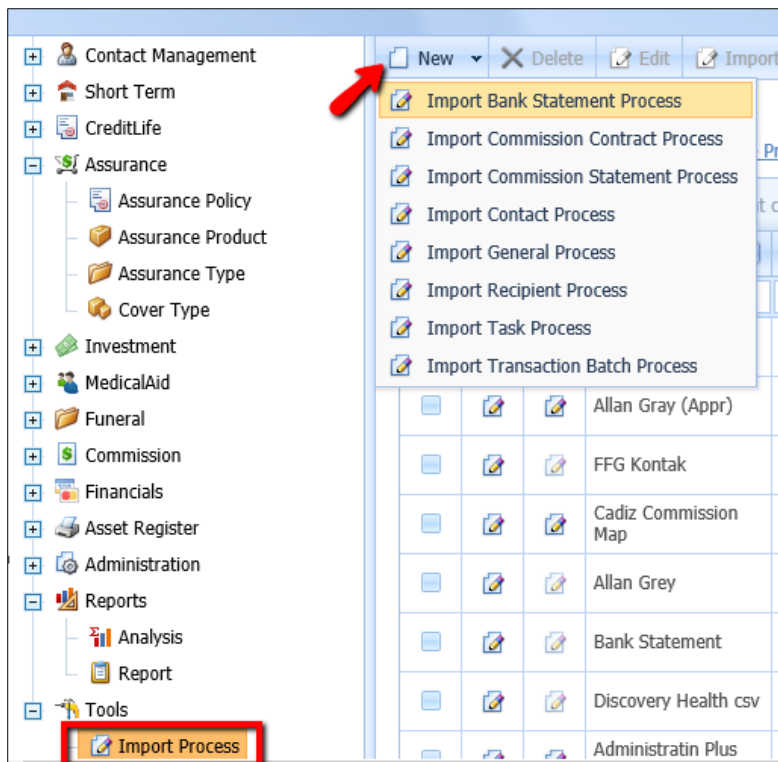


Import Map	File	Import Status	Date Created	Created By	Last Updated	Updated By	Import Type
Allan Gray (Appr)	Adviser Fee Statement June 2019.xlsx	Import with Errors	2019-07-01	ElsabeV	2019-07-01	ElsabeV	Import Commission Statement Process
Allan Gray (Appr)	Adviser Fee Statement D3634 Account(2).xlsx	Import with Errors	2019-07-17	ElsabeV	2019-07-17	ElsabeV	Import Commission Statement Process
FFG Kontak	FFG Kontak MIS.xlsx	Successfully Imported	2018-05-03	SysAdmin	2018-05-03	SysAdmin	Import Contact Process
Cadiz Commission Map	Cadiz Statement.xls	Submitted	2018-02-21	MaxineD	2018-03-07	MaxineD	Import Commission Statement Process
Allan Grey	Adviser Fee Statement June 2019.xlsx	Successfully Imported	2019-07-01	ElsabeV	2019-07-01	ElsabeV	Import Commission Statement Process
Bank Statement	Bankstatement 20180328.xlsx	Successfully Imported	2018-05-07	ElsabeV	2018-05-07	ElsabeV	Import Bank Statement Process
Discovery Health csv	Disc Health June 2019(1).csv	Successfully Imported	2019-06-28	ElsabeV	2019-06-28	ElsabeV	Import Commission Statement Process
Administratin Plus Client list	Administratin Plus Client list.xlsx	Import with Errors	2018-05-03	SysAdmin	2018-05-03	SysAdmin	Import Contact Process
Debit order unmet	Debit order rejection file.csv	Import with Errors	2018-05-08	SysAdmin	2018-05-08	SysAdmin	Import General Process

Log Date	Import Log Type	Log Message
2019-07-01 08:19:33.0030 AM	Error	This data is missing in file : Benefit Type, Policy Number.
2019-07-01 08:19:33.0500 AM	Error	This data is missing in file : Benefit Type, Policy Number.
2019-07-01 08:19:33.0500 AM	Error	Column {A} Row 40 in the file cannot be converted to type DATE

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 set the status to Ready for Import.

Importing data on the Web application is regulated by services and processes. Please contact us to set up these services and processes according to your business requirements.

Imported data will be visible on the temporary tables:

	Legal Reference	Lead Source	First Name	Surname	Client Code	Email	Contact Type	Import Status	Import Attempts	Date Last Imported
	7203119943022		Abram	Keppler	7203119943022	AbramKeppler@demo.co.za	Client	New	0	
	6901183196195		Annestine	JamesChambers	6901183196195	AnnestineJamesChambers@demo.co.za	Client	New	0	
	8511082366030		Ashley	Nkani	8511082366030	AshleyNkani@demo.co.za	Client	New	0	
	6811150634007		BONGEKILE	Ndilela	6811150634007	BONGEKILENdilela@demo.co.za	Client	New	0	
	7010123785133		Brendelene	Beneke	7010123785133	BrendeleneBeneke@demo.co.za	Client	New	0	
	6205250564170		Cathleen	Malan	6205250564170	CathleenMalan@demo.co.za	Client	New	0	
	8003253984064		Constance	Makunyane	8003253984064	ConstanceMakunyane@demo.co.za	Client	New	0	
	7402012006095		Cynthia	Nzama	7402012006095	CynthiaNzama@demo.co.za	Client	New	0	
	9407017959053		David	Mduli	9407017959053	DavidMduli@demo.co.za	Client	New	0	
	6903040332115		Ditshego	Sophia Hendricks	6903040332115	DitshegoSophiaHendricks@demo.co.za	Client	New	0	

Individual records can be amended on the temporary tables before final import into the database



IMP Contact - Abram

Task Dashboard / Import Process / IMP Contact / Abram

Save Save and Close Save and New Cancel

Contact Properties

Contact Information

☐ Is Company

Surname: Keppler Date Of Birth: 1972-03-11

First Name: Abram Legal Reference: 7203119943022

Second Name: Carel Passport Number:

Call Name: Language: English

Initials: Gender: Male

Title: Mr Marital Status:

Group: Trevor Phillips Enterprises Nationality: Unknown

Contact Type: Client Ethnic Group:

Client Code: 7203119943022 Religion:

Client Check: 0 Maiden Name:

Lead Source: Reference Number:

Employer: FSCA Number:

Monthly Salary: R 0.00 Vat Number:

Qualification: Category:

Smoker Status: Non-Smoker

Set status of records to Ready for Import to be imported into database.

IMP Contact

Task Dashboard / IMP Contact

New Clone... Delete Edit Set Status Refresh Links Export to

Drag a column header here to group by that column

		Legal Reference	Lead Source	First Name	Surname	Client Code
☒		7203119943022		Abram	Keppler	7203119943022
☐		6602067995142	-	Abram	Steenkamp	6602067995142
☐		0109190972149	-	Agnes	Fila	0109190972149
☐		5702251937195	-	Alice	Abrahams	5702251937195
☐		9106197285040	-	Andrew	Makgale	9106197285040
☐		6901183196195		Annestine	JamesChambers	6901183196195



Short term

A product must be setup 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 on the application:

Name	Product Provider	Product Type	Minimum Premium	Is Active	Last Month End	Minimum Premium Frequency	Insurer	Area List
Commercial Multi-Mark III Template	Teessen Consulting CC	Commercial	R 0.00	☒				
Personal Lines Template	Teessen Consulting CC	Personal Lines	R 0.00	☒				
Veticare (Pet - I - Care)	Teessen Consulting CC	Personal Lines	R 0.00	☒			Santam Insurance Company	

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

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

Name	Product Provider	Product Type	Minimum Premium	Is Active	Last Month End	Minimum Premium Frequency	Insurer	Area List
Commercial Multi-Mark III Template	Teessen Consulting CC	Commercial	R 0.00	☒				
Personal Lines Template	Teessen Consulting CC	Personal Lines	R 0.00	☒				
Veticare (Pet - I - Care)	Teessen Consulting CC	Personal Lines	R 0.00	☒			Santam Insurance Company	

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 premium. (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 on which commission is received is different from the Consultant linked to the Policy

4. Create the content of your product

	Description	Priority	Sasria Group	Translation 1	Translation 2
	Accidental Damage	12		Toevallige Skade	Accidental Damage
	Accounts Receivable	5		Rekenings Ontvangbaar	Accounts Receivable
	Buildings Combined	2	Fire - Commercial	Geboue Omvattend	Buildings Combined
	Business All Risks	11		Sake Alle Risiko	Business All Risks
	Business Interruption	4		Sakeonderbreking	Business Interruption
	Deterioration of Stock	25		Verslegting van voorraad	Deterioration of Stock
	Electronic Equipment	18		Elektroniese Toerusting	Electronic Equipment

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 e.g. 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
Allow Zero Insured Amount	Select when insured amount does not apply to this risk
Minimum Insured Amount	Enter when applicable as per underwriting criteria
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):

Motor Vehicle-Kia Rio Sedan - Motor

General Information

Registered Owner: N/A
 Registered Owner Relationship: N/A
 Legal Entity: N/A
 Type Of Cover: N/A
 Vehicle Use: N/A
 Overnight Parking: N/A
 Fleet Number:

Regular Driver Details

Regular Driver: N/A
 Regular Driver Relationship: N/A
 Driver License Date Issued:
 Driver License Code: N/A

Vehicle Details

Mead & McGrouther:
 Manufactured Year: 0
 Make:
 Model:
 Registration Number:
 Vin Number:
 Engine Number:
 Colour:
 Number Of Seats: 0

Premium Information

No Claim Bonus: N/A

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)

Excesses

New Delete Edit Export to

Description	Is Voluntary Excess	Default Amount	Default Percentage	Mandatory	Editable	Translation 1	Translation 2
No data to display							

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 separately, but is part of the original risk item. An example of this is a watercraft (motorboat) where the engines are insured separately, but are also part of the craft. Each engine is therefore a risk in its own right.

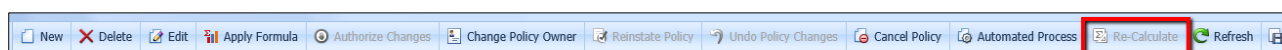


Rate Maintenance

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 with 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 is compulsory during the Claims process and won't be available unless specified on the product.

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



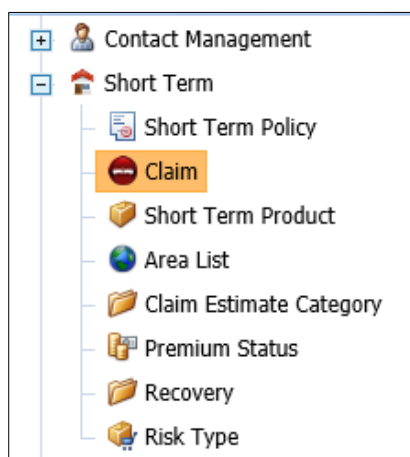
All fields captured during product creation will be available on the policy view as drop-down lists or selections.

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 setup 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 setup 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	
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 Collection	Select when premium is collected on this product	



Benefits

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

Disability - Credit Life Benefit

Credit Life Benefit

Description:* Disability Installments Per Claim: 12

☐ Default Value Max Cover: R 120 000.00

Cancel Reason: N/A ☐ Balance To Insured

Cover:* Installment Claim Formula: Credit Life Disability Claim

OK Cancel

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 i.e. 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 setup on Credit Life settings in conjunction with Teessen Consulting.

Credit Life Report

Report:* N/A

Description:

Apply to process: Cancelled ☐ Is Active

Document Type:* N/A ☐ Attach To Contracts

Internal Email: ☐ Client

☐ Creditor

Creditors

Export to

Name	Email	Company	RID Trader	Address	NCR Registration Number	Active	Hyphen Description	Hyphen Creditor Link
No data to display								

OK Cancel



Creditors are linked to the specific report

	Name	Email	Company	RID Trader	Address	NCR Registration Number	Active	Hyphen Description	Hyphen Creditor Link
☐	Bayport Financial Services	info@bayport.co.za	ADONISI TAXI'S	12345678	ZONE 8 NO 36, Langa, South Africa, 7455	54321	☒		

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.

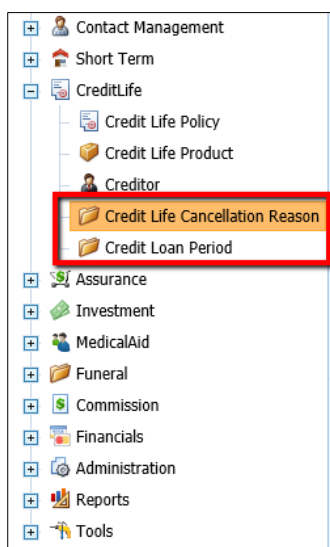
This is particularly important for claims purposes.

Creditor

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

Report	Product	Description	Creditor	Client	Attach To Contracts	Is Active	Is Imported	Document Type	Internal Email
No data to display									

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 setup 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 when start	



	date is entered and no end date is captured. Product will become in-active once end date is captured.
Is Vatable	Select if 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 Type	Cover Type	Amount	Premium	Comment
Death	Death	R 1 500 000.00	R 0.00	Beneficiary listed - 1
Dread Disease	Dread Disease	R 750 000.00	R 0.00	
Critical Illnes	Income Replacement	R 750 000.00	R 0.00	



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 be setup 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 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 Investment 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.	
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 can be linked to a specific Investment Product

Medical Aid

Medical Aid Product

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

The screenshot shows the 'Medical Aid Product' form in the TC Web Application. The form is titled 'Medical Aid Product' and includes a breadcrumb trail: 'Assurance Policy / Assurance Product / Investment Product / Medical Aid Product / Medical Aid Product'. The form has a 'Detail' tab selected. The fields are as follows:

- Name: *
- Product Provider: *
- Description: *
- Loyalty Program: *
- External Code: *
- Product Category: *
- Start Date: *
- End Date: *
- Is Vatable: *
- Is Active: *
- Validate Contract Consultant: *
- Enable Collections: *

A red arrow points to the 'New' button in the top left corner of the form.

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

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

The screenshot shows the 'Medical Aid Product' configuration page. The 'Loyalty Program' field is highlighted in red. A dropdown menu is open, showing the 'Loyalty Program' option selected. The right panel shows the 'Loyalty Program - Discovery Vitality' configuration with a list of statuses: Blue, Bronze, Gold, and Silver.

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 which 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



Detail

Wording

Translation

Translation 1:

Applicant Only

Translation 2:

Applicant Only

New Contract Number Format:

New Claim Number Format:

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 setup directly from the Group Scheme or separately when not part of a Group Scheme

Contact Management

Short Term

CreditLife

Assurance

Investment

MedicalAid

Funeral

Group Scheme

Funeral Plan

Funeral Benefit Type

Member Type

Funeral Group Policy

Funeral Policy

Commission

Financials

Administration

Reports

Tools

Tools

Reset View Settings

New

Delete

Validate

Refresh

Group Scheme - Liberty Comprehensive

Medical Aid Product / Loyalty Program / Discovery Vitality / Group Scheme / Liberty Comprehensive

Save

Save and Close

Save and New

Cancel

Detail

Translation

Name:*

Liberty Comprehensive

Description:

Product Provider:*

Liberty

Administrator:*

MSB Independent Broker Group (Pty) Ltd

Product Category:*

Funeral Cover

External Code:

Start Date:*

2001-01-01

Max Cover Limit:*

R 50 000.00

End Date:

☒ Is Active

Policies

Plans

Notes

Documents

Questionnaires

New

Close

Link

Unlink

Delete

Edit

Export to

	Name	Underwriter	Max Cover Amount	Max Dependants	Enable Collections	Valid Benefits	Principle Member Max Age	Principle Member Min Age	Is Active	Last Updated	Updated By
	Extended Family	MSB Independent Broker Group (Pty) Ltd	R 50 000.00	9	☒	☒	65	0	☒	2018-08-08	ElsabelV

Page 1 of 1 (1 items)

Page size: 20



Benefits

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:

Extended Family - Funeral Plan

Clone...

Detail Wording

Name:* Extended Family Description:

Product Provider:* Liberty Underwriter:* MSB Independent Broker Group (Pty) Ltd

Product Category:* Funeral Cover Group Scheme: Liberty Comprehensive

Principle Member Min Age:* 0 External Code:

Waiting Period: 6 Principle Member Max Age:* 65

Start Date:* 2001-01-01 Max Cover Amount:* R 50 000.00

End Date: Max Dependents: 9

☒ Is Active ☒ Enable Collections

☐ Is Vatable ☐ Validate Contract Consultant

☐ Compliance Change Tracking

Benefits Policies Benefit Codes Product Roles Notes Documents Questionnaires Propertiesheets

New Delete Edit Export to

Benefit	Minimum Age	Apply Min Age As	Maximum Age	Apply Max Age As	Max Cover Amount	Underwriting Premium	Administrator Premium	Commission Percentage	Commission Cost	Total Premium	Applied Per Dependant	Max Dependents	Default	Active
Extended Family 1 - 5	1	Years	5	Years	R 15 000.00	R 100.00	R 15.00	0.00%	R 15.00	R 115.00	☒	0	☐	☒
Extended Family 13 - 17	13	Years	17	Years	R 25 000.00	R 130.00	R 25.00	0.00%	R 15.00	R 155.00	☒	0	☐	☒
Extended Family 18 - 65	18	Years	65	Years	R 30 000.00	R 150.00	R 30.00	0.00%	R 15.00	R 180.00	☒	0	☐	☒
Extended Family 6 - 12	7	Years	12	Years	R 20 000.00	R 120.00	R 20.00	0.00%	R 15.00	R 140.00	☒	0	☐	☒

Funeral Benefit

Funeral Benefit Exceptions

Benefit:*

Funeral Benefit Type:* N/A

Max Dependents: 0

Apply Min Age As: Years

Minimum Age: 0

Apply Max Age As: Years

Maximum Age: 0

Priority: 0

Max Cover Amount: R 0.00

Underwriting Premium: R 0.00

Administrator Premium: R 0.00

Total Premium: R 0.00

Apply Commission As: Cost

Commission Percentage: 0.00%

Commission Cost: R 0.00

☐ Active ☐ Default ☐ Applied Per Dependant

OK Cancel



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 either months or years	
Minimum Age	Minimum age of person to be covered	
Apply Max Age As	Maximum age can be either 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' in order 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.

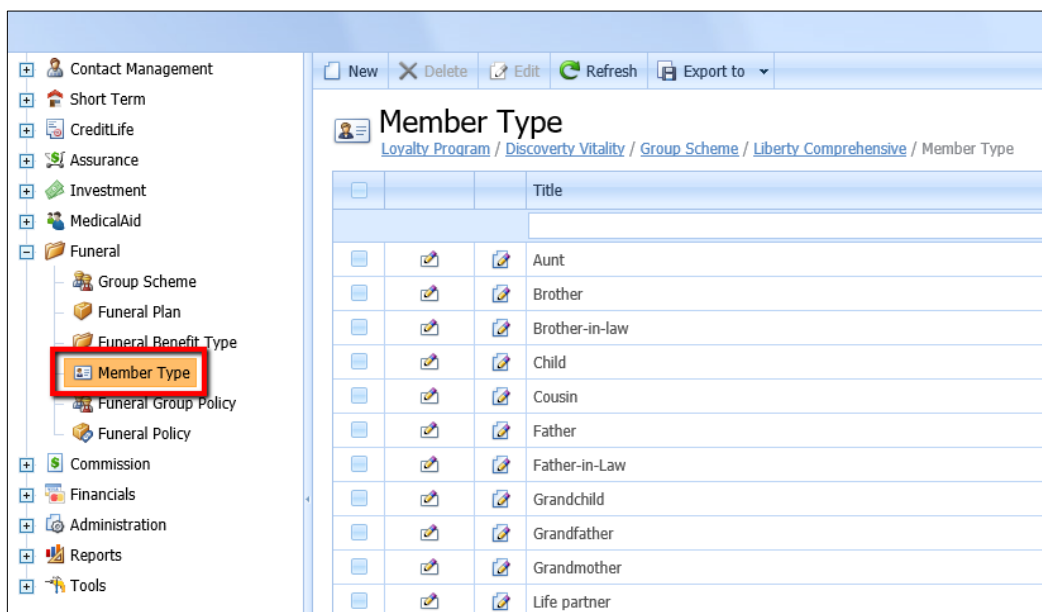
The screenshot displays two windows from the TC Web Application. The top window, titled 'Funeral Benefit', contains a table with columns 'Description' and 'Proof Required'. A red arrow points to the 'Link' button in the toolbar. The bottom window, titled 'Funeral Exception', shows a 'New' button highlighted with a red box. Below the button is a search bar and a list of exceptions: 'Disabled' and 'Student'. The page size is set to 20, and the page number is 1 of 1 (2 items).



Member Type

Member types can be setup from either the Benefit screen or 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 Principle 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.



Commission Product
[Credit Life Product](#) / [Assurance Product](#) / [Investment Product](#) / [Commission Product](#) / Commission Product

Save Save and Close Save and New Cancel

Detail Translation

Product Provider:* N/A

Name:*

Product Category:* N/A

External Code:

Start Date:* 2019-08-06

End Date:

☒ Is Active
☐ Is Vatable
☒ Validate Contract Consultant

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:

Commission Statement Detail Process

Commission Contract

☐ Create Contract

Default Owner: Broker

New Contract Status:* N/A

☒ Use Template ☐ Use Default % When Template Not Found

Commission Product

☒ Auto Create Product

Default Commission Product Category:* N/A

Commission Transaction

☒ Auto Create Transaction Type

☐ Merge Similar Transactions

☐ Update Contract Contribution

OK Cancel

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. Please refer to Contract Roles section in the TC Insure-IV Suite User Guide.

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.

The screenshot displays the 'Product Code' management interface. The left pane shows a list of products grouped by 'Product' (Momentum). The right pane shows the details for 'Retirement Annuity', including Name, Description, Investment Type, Product Provider, Product Category, External Code, and Start Date. The 'Benefit Codes' tab is highlighted in the bottom right pane.

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:

The screenshot displays the 'Transaction Type' configuration form. Fields include Description, Short Description, System Type, Income/Expense, External Code, Category, and Default Unit Cost. The 'Auto Approve' checkbox is also visible.

Fieldname	Description	Required
Description	Provide a user-friendly name for the transaction. It will be used in display and reporting.	✓
Short Description	This provide 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 have an effect on 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

Setup 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:

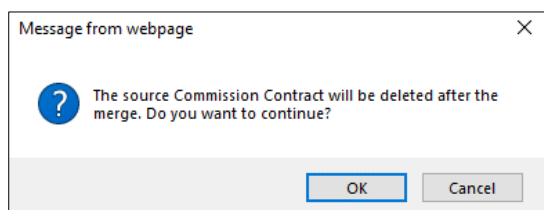
- Statement Details
- Market Values
- Tasks
- Notes
- Documents
- Questionnaires
- Property Sheets



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

Commission Contract										
Product Code / Retirement Annuity / Retirement Annuity / Transaction Type / Commission Contract										
Drag a column header here to group by that column										
	Owner	Contract Number	Commission Product	Product Provider	Inception Date	Market Value	Status	Consultant	Last Statement Date	Template
☒	Nel David (D A)	1384293	Coastal Saver-Discovery	Discovery Health	2019-01-04	R 0.00	Active	Nel David (D A)	2019-04-01	David Nel Generic
☐	Nel David (D A)	3896123	Coastal Saver-Discovery	Discovery Health	2019-01-04	R 0.00	Active	Nel David (D A)	2019-04-01	David Nel Generic
☐	MDINGI Z (Z)	CD20098798	Balanced Fund - Cadiz	Cadiz Asset Management	2018-02-02	R 0.00	Active	Abrahams Mark (M.)	2019-07-01	Abrahams Generic
☐	Nel David (D A)	1546093	Coastal Saver-Discovery	Discovery Health	2019-01-04	R 0.00	Active	Nel David (D A)	2019-04-01	David Nel Generic
☐	Derbyshire Lance (L)	IA00067022	INVACC - AIMS	AIMS	2018-03-21	R 0.00	Active	Taylor Gareth (G.S.)	2018-03-21	Taylor Gareth Generic
☐	Du Preez Thomas (T)	IA10004841	INVACC - AIMS	AIMS	2018-03-21	R 0.00	Active	Kane J (J)	2018-03-21	Kane J Generic
☐	Taylor Gareth (G.S.)	CD20098800	Worldwide Flexible Fund - Cadiz	Cadiz Asset Management	2018-02-02	R 0.00	Active	Taylor Gareth (G.S.)	2019-07-01	Taylor Gareth Generic
☐	Plessis Johannes (J.P.J.D.)	JP-CLS-22	Credit Life Forbes	Forbes	2017-04-13	R 0.00	Active			
☐	Filander John (J.P.)	CD20098787	Absolute Yield Fund - Cadiz	Cadiz Asset Management	2018-02-02	R 0.00	Active	Filander John (J.P.)	2019-07-01	Filander J Generic
☐	Yende Roxanne (R.)	984456	Retirement Annuity	Momentum	2018-04-01	R 0.00	Active	Van Deventer Maxine (M.)		Abrahams Generic
☐	Kasayi Freddy (F Z)	IA00074215	INVACC - AIMS	AIMS	2018-03-21	R 0.00	Active	Taylor Gareth (G.S.)	2018-03-21	Taylor Gareth Generic
☐	RAVHELE T (T A)	CD20098792	Worldwide Flexible Fund - Cadiz	Cadiz Asset Management	2018-02-02	R 0.00	Active	Abrahams Mark (M.)	2019-07-01	Abrahams Generic
☐	Richardson MS (MS)	CD20098756	Absolute Yield Fund - Cadiz	Cadiz Asset Management	2018-02-02	R 0.00	Active	Richardson MS (MS)	2019-07-01	MS Richardson Generic
☐	Manell VW	CD20098734	Balanced Fund -	Cadiz Asset	2018-02-02	R 0.00	Active	Kane J (J)	2018-03-21	Kane J Generic

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:

Merge Commission Contract Process

Source Contract:*
Nel David (D A) (Discovery Health - 1384293)

Destination Contract:*
N/A

New
Clone...

nel david
Search

	Owner	Product Provider Name	Commission Product	Contract Number
☐	Nel David (D A)	Discovery Health	Coastal Saver- Discovery	5008170
☐	Nel David (D A)	Discovery Health	Coastal Saver- Discovery	1915202
☐	Nel David (D A)	Discovery Health	Coastal Saver- Discovery	5056913
☐	Nel David (D A)	Discovery Health	Coastal Saver- Discovery	4070660
☐	Nel David (D A)	Discovery Health	Coastal Saver- Discovery	2936014
☐	Nel David (D A)	Discovery Health	Coastal Saver- Discovery	1198104
☐	Nel David (D A)	Discovery Health	Coastal Saver- Discovery	5303882
☐	Nel David (D A)	Discovery Health	Coastal Saver- Discovery	2196053

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.

Short Term

CreditLife

Assurance

Investment

MedicalAid

Funeral

Commission

Recipient

Recipient Statement

Template

Commission Contract

Commission Statement

Tools

Convert Commission Contract

Convert to Short Term Policy

Convert to Credit Life Policy

Convert to Medical Aid Policy

Convert to Assurance Policy

Convert to Funeral Policy

Convert to Investment Policy

Commission Contract

Product Code / Retirement Annuity / Retirement Annuity / Transaction Type / Commission Contract

Drag a column header here to group by that column

	Owner	Contract Number	Commission Product	Product Provider	Inception Date	Market Value	Status	Consultant	Last Statement Date	Use Template	Template
☒	Nel David (D A)	1384293	Coastal Saver-Discovery	Discovery Health	2019-01-04	R 0.00	Active	Nel David (D A)	2019-04-01	☒	David Nel Generic
☐	Nel David (D A)	3896123	Coastal Saver-Discovery	Discovery Health	2019-01-04	R 0.00	Active	Nel David (D A)	2019-04-01	☒	David Nel Generic
☐	MDINGI Z (Z)	CD20098798	Balanced Fund - Cadiz	Cadiz Asset Management	2018-02-02	R 0.00	Active	Abrahams Mark (M.)	2019-07-01	☒	Abrahams Generic
☐	Flander John (J.P.)	CD20098787	Absolute Yield Fund -Cadiz	Cadiz Asset Management	2018-02-02	R 0.00	Active	Flander John (J.P.)	2019-07-01	☒	Flander J Generic
☐	Yende Roxanne (R.)	984456	Retirement Annuity	Momentum	2018-04-01	R 0.00	Active	Van Deventer Maxine (M.)		☒	Abrahams Generic
☐	Kasayi Freddy (F Z)	IA00074215	INVACC - AIMS	AIMS	2018-03-21	R 0.00	Active	Taylor Gareth (G.S.)	2018-03-21	☒	Taylor Gareth Generic
☐	RAVHELE T (T A)	CD20098792	Worldwide Flexible Fund- Cadiz	Cadiz Asset Management	2018-02-02	R 0.00	Active	Abrahams Mark (M.)	2019-07-01	☒	Abrahams Generic
☐	Richardson MS (MS)	CD20098756	Absolute Yield Fund - Cadiz	Cadiz Asset Management	2018-02-02	R 0.00	Active	Richardson MS (MS)	2019-07-01	☒	MS Richardson Generic
☐	Manelli VW (VW)	CD20098774	Balanced Fund - Cadiz	Cadiz Asset Management	2018-02-02	R 0.00	Active	Kane J (J)	2019-07-01	☒	Kane J Generic
☐	Dirks Juanita (J)	IA00045125	INVACC - AIMS	AIMS	2018-03-21	R 0.00	Active	Kane J (J)	2018-03-21	☒	Kane J Generic

Medical Aid Policy

Clone...

Detail

Account

Commission

Owner:*

Nel David (D A)

Medical Contribution:

R 0.00

Employer:

N/A

Contribution Frequency:

Monthly

Product:*

Coastal Saver- Discovery

Loyalty Program:

Discovery Vitality

Product Provider:*

Discovery Health

Loyalty Number:

Contract Number:*

1384293

Loyalty Program Status:

N/A

Source:

N/A

Has GAP Cover

☐

Inception Date:

2019-01-04

GAP Cover Policy No:

Status:*

Active

GAP Cover Premium:

R 0.00

Consultant:

Nel David (D A)

Late Joining Penalty:

N/A

Cancel Date:*

Intermediary:

N/A

Cancel Reason:*

N/A

Tasks

Dependents

Contract Links

Documents

Notes

Questionnaires

Property sheets

History

New

File Task

Unfile Task

Forward Task

Schedule Task

Clone...

Delete

Edit

Automated Process

Add Note

Show in Report

Export to

Filter

My Tasks

Task Number	Subject	Type	Start Date	Due Date	Status	Priority	Percentage Complete	Assigned To	Created By	Date Created	Reported By
					N/A	N/A					



Financials

Configuration of the various reference tables is an important part of how the Financial module implement 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 or 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 with 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