

# Salaam Takaful

User Manual

## Table of Contents

1.	Login to Salaam Takaful .....	3
2.	Customer Information Registration .....	3
1.1.	CIF Individual .....	3
a.	CIF Individual Add Mode .....	3
b.	CIF Individual Modify Mode .....	4
C.	CIF Individual Inquire Mode .....	4
1.2.	CIF Corporate .....	5
a.	CIF Corporate Add Mode .....	5
b.	CIF Corporate Modify Mode .....	5
C.	CIF Corporate Inquire Mode .....	5
3.	Proposal .....	6
3.1.	Proposal Add Mode .....	6
3.2.	Proposal Modify Mode .....	8
3.3.	Delete Proposal .....	8
4.	Authorize the Proposal .....	8
5.	Generate Policy Number .....	9
6.	Premium Receipt Order .....	9
7.	Collect Premium .....	10
	Collect premium (premium receipt order) .....	10
	Delete uncollected premium receipt order .....	11
8.	Print Policy .....	11
9.	Policy Renewal .....	12
9.1	Policy Renewal Add Mode .....	12
9.2	Policy Renewal Modify Mode .....	13
10.	Admin Control .....	13
11.	Multiple ATP .....	14
11.1.	Addition of Risk Identification .....	15
11.2.	Deletion of Risk Item .....	16
	Admin Note .....	17
11.3.	Deletion of Risk Identification .....	17
11.4.	Addition of Risk Item .....	18
11.5.	Addition of Risk Identification .....	18

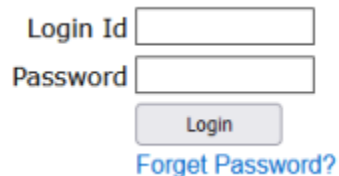
11.6 Cancellation of Policy by AIC.....	18
11.7 Change in Sum Insured .....	18
11.8 Cancellation of Policy with Full Premium Refund .....	18
11.2 ATP Modify Mode .....	18
Refund.....	18
12. Motor Certificate .....	19
12.1 Register Motor Certificate Number .....	19
12.2 Assign Motor Certificate to a Branch.....	19
12.3 View assigned Motor Certificates .....	20
13. Motor Certificate Issue .....	20
13.1 Motor Certificate Issue [Add Tab].....	20
13.2 Motor Certificate Re-allocation [Add Tab].....	21
13.3 Motor Certificate Issue Approval.....	23
13.4 Motor Certificate Premium Receipt Order .....	23
13.5 Motor Certificate Issue [Inquire Tab].....	24
14. Motor Certificate Issue Update .....	24
15. Motor Certificate Report .....	25
16. Yellow Card Proposal .....	26
17. Yellow Card Proposal Approval.....	27
18. Yellow Card - Premium Receipt Order .....	27

## 1. Login to Salaam Takaful

1. Type the address of Salaam Takaful System, in chrome browser

- a. For head office: 10.1.5.13:90/TKF\_Live/Login
- b. For Branches: 10.1.1.2:90/TKF\_Live/Login then click **Enter**

Note: a page that asks user to enter Login Id and Password will appear.



The image shows a login form with two input fields: 'Login Id' and 'Password'. Below the 'Password' field is a 'Login' button. Below the button is a blue link that says 'Forget Password?'.

2. Enter your Login Id and Password then click Login (or Enter key from keyboard)

Note! If your login id and Password are correct, then the system redirects to the Default page that contains Branch Date, Full Name and your Branch.

3. Based on user's role a menu that contains a list of pages will be shown on the left side of the page.

## 2. Customer Information Registration

Purpose: to Register Customer information.

### 1.1. CIF Individual

#### a. CIF Individual Add Mode

Purpose: To register Customer information

Steps to register Customer Information

1. Login with user account (Login Id and Password) that has "Underwriter" role.
2. Go to Menu > Customer Information > Entries > CIF Individual or CIF Corporate
3. Click Add tab (if the tab selected is not Add tab)
4. Under Basic Information
  - a) Select Salutation
  - b) Enter First Name, Father name, Grand Name and Mother Name
  - c) Click Check Availability. If the customer is already registered the system displays a message otherwise the system displays at the bottom of the page.
5. Under Personal Information
  - a) Enter Date of Birth, Select Gender, Marital Status, number of dependents, select Nationality and Religion.
6. Under Occupation Details
  - a) Select Occupation > Enter Employer > Select Industry > Select ID Type > Type Id Number, Issued By, Date of Issue, Date of Expiry and Place of Issue.

7. Under Tax Details
  - a) Type Tax Id Number, TIN Shared Customer Name, Auxiliary Name and Mobile App Login ID.
8. Under Communication Details
  - a) Select Address Type > Select Woreda > Select Kebele > Type Houser Number, Building Name, Po Box Number, Phone Number, Fax Number, Mobile Number and Email Address then Click Add Communication Detail.
  - b) Enter Remark
9. Click **Save**.

Note! The system displays a message “Detail saved Successfully!” Note! When the user clicks on Save button, the system generates CIF Number. The user can use the CIF Number later to register proposal.

10. To clear the entire page, user can click on **Reset** button.

#### b. CIF Individual Modify Mode

**Purpose:** To modify Individual information

Steps to modify Individual information

1. Login with user account (Login Id and Password) that has “Underwriter” role.
2. Go to Menu > Customer Information > Entries > CIF Individual
3. Click **Modify** tab
4. Edit/Modify fields you want to modify.
5. Click **Update**. The system displays a message “Detail updated successfully!”

#### C. CIF Individual Inquire Mode

Steps to view details of Individual information

1. Login with user account (Login Id and Password) that has “**Underwriter**” role.
2. Go to Menu > Customer Information > Entries > CIF Individual
3. Click **Inquire** tab.
4. Click **Search** next to CIF Number.
5. In the popup window Select **Host Branch**.
6. **[Optional]** Enter CIF Number and/or Enter Customer Name and/or Enter Father Name
7. Click **Retrieve**,
8. If there are records that matches the information provided, a grid will be displayed otherwise “no record found” message will be displayed. To View details of **Click** any row.

## 1.2. CIF Corporate

### a. CIF Corporate Add Mode

**Purpose:** To register Customer information

Steps to register Customer Information

- 1) Login with user account (Login Id and Password) that has “Underwriter” role.
- 2) Go to Menu > Customer Information > Entries > CIF Corporate
- 3) Click Add tab (if the tab selected is not Add tab)
- 4) Under Basic Information
  - a) Select Salutation and Enter Customer Name
- 5) Under Industry Detail
  - a) Select Industry and Date of Incorporation
- 6) Under Identification Details
  - a) Select Id Type > Enter ID Number, Issued By, Date of Issue, Date of Expiry, Place of Issue and Tax ID Number.
- 7) Under Communication Details
  - a) Select Address Type, Woreda and Kebele
  - b) Enter Houser Number, Building Name, Phone Number, Mobile Number, Email Address, Fax and P.O. Box.
- 8) Click **Save**. The system displays a message “Detail saved Successfully!”

### b. CIF Corporate Modify Mode

**Purpose:** To modify corporate information

Steps to modify corporate information

1. Login with user account (Login Id and Password) that has “Underwriter” role.
2. Go to Menu > Customer Information > Entries > CIF Corporate
3. Click Modify tab
4. Edit/Modify fields you want to modify.
5. Click **Update**. The system displays a message “Detail updated successfully!”

### C. CIF Corporate Inquire Mode

Steps to view details of corporate information

1. Login with user account (Login Id and Password) that has “**Underwriter**” role.
2. Go to Menu > Customer Information > Entries > CIF Corporate
3. Click **Inquire** tab.
4. Click **Search** next to CIF Number.
5. In the popup window Select **Host Branch**.

6. **[Optional]** Enter CIF Number and/or Enter Customer Name and/or Select ID Type and/or Enter Tax Id Number
7. Click **Retrieve**
8. If there are records that matches the information provided, a grid will be displayed otherwise “no record found” message will be displayed. To View details of **Click** any row.

### 3. Proposal

#### 3.1. Proposal Add Mode

Purpose: To register proposal

Steps

1. Login with user account (Login Id and Password) that has “Underwriter” role.
2. Go to Menu > Underwriting > Transactions > Proposal
3. Click Add tab (if the Add tab is not selected)
4. Select Policy Name
5. Select Business Source Type (Auxiliary Type, Bank or Direct).
6. If you select Auxiliary Type as a Business Source Type in step
  - a. Select Auxiliary Type (either Licensed Agent or Broker)
  - b. Select Auxiliary Name
7. If you select Bank as a Business Source Type in step
  - a. Select Bank Name
  - b. Select Bank Branch Name
8. If you select Direct as a Business Source Type in step 5 then there is no need to enter details for Auxiliary Type and Bank Name and Bank Branch Name.
9. Type **Period** and select **Day, Month** or **Year** from the dropdown control.

Note! **Policy Period From** date is the next day of your Branch Date.

10. The system calculates and displays Period To date based on the information provided in step 9.
11. In step 4, if the selected policy is “Marine All Risks Policy” then the user is expected to enter detail for **Transit From, Transit To** and **Mode of Transport**.
12. In step 4, if the selected policy is “Fire and Lightening Policy” then the user is expected to enter detail for Site Location.
13. Under Customer Details
  - a. Click search
  - b. The system displays a popup window. From the pop-up window, select CIF Type or Enter any piece of information in the text boxes provided.
  - c. Click **Retrieve**

Note! The system displays records in a grid based on the search criteria(s) in step 13. b.

- d. If the record you want is not in the list click **Next** or **Last**.
- e. To select the record you want, click on any row data (CIF Number, Host Branch or Full Name).

Note! The system fills CIF Number and Customer Name.

14. Click **Continue**, to save proposal details.

15. Under Basic Information

- a. Select **Rate Type** (Per Cent, Per Mille or Fixed Amount)
- b. Enter **Rate/Fixed Amount**
- c. Select **Risk Identification**
- d. Select No of Risk Items (Single or Multiple)
- e. If Multiple is selected then the system lets the user to enter the number of risk item in the textbox provided. Otherwise, if Single is selected the system displays 1 in the textbox.
- f. Click Add. Note! the system displays a data grid that contains the information you provided.
- g. If you don't want the risk then click Delete
- h. If you want to edit the risk then click Edit (the user can select a different risk or change status from single to multiple and the number of items or vice versa) To enter Risk Details

16. Click Enter Risk Detail Note! A popup window is displayed.

- a. Select the Risk
- b. Select the Item
- c. Enter Item Reference and other details
- d. Enter applicable values for Sum Insured Components Otherwise Enter 0 (zero)
- e. Click **Submit**.

Note! If you want to enter risk details for another item, go through steps 16.a. to 16.e.

- f. Click **Close**, to close the pop-up window

#### **To enter Peril Details**

17. Click Enter Risk Detail Note! A popup window is displayed.

- a. Select the risk
- b. Select the Item
- c. Enter Peril Details
- d. Click Submit

Note! If you want to enter Peril details for another item, go through steps 17.a to 17.d.

- e. Click **Close**, to close the pop-up window

18. To add another risk for the product (policy) repeat step 15 (a-h), 16 (a-f) and 17(a-e).

19. Enter **Standard Risk Description**.

20. Click **Save**.

Note! The system displays a message "**Details have been successfully Sent for Authorization**" and generates a proposal Number.

21. Click "**View Premium Sheet**" to view proposal premium sheet.



### 3.2. Proposal Modify Mode

Purpose: To Modify Proposal that are not approved by the respective branch manager.

Steps to Modify Proposal

1. Login with user account (Login Id and Password) that has “**Underwriter**” role.
2. Go to Menu > Underwriting > Transactions > Proposal
3. Click **Modify** tab
4. Click **Search**. A popup window is displayed.
5. From the popup window, select **product** and/or enter any search criteria.
6. Click **Retrieve**. The system displays data grid based on the search criteria provided in step 5.
7. Click on any row that you want to modify.
8. **Modify/Edit** data that you want to modify.
9. Click **Update**.

### 3.3. Delete Proposal

This will be the role of Underwriter

Purpose: to Delete proposal

Steps to Delete proposal that is not approved.

1. Login with user account (Login Id & Password) that has “Underwriter” role.
2. Click Delete tab.
3. Enter the Proposal Number that you want to Delete.
4. Click **Delete**.

Note! If the record is found and delete then the system displays “**Record Deleted Successfully!**” otherwise “**Record not found**”.

## 4. Authorize the Proposal

This will be the role of **Branch Manager**

Purpose: to authorize the proposal

Steps to authorize the proposal

1. Login with user account (Login Id & Password) that has “**Branch Manager**” role.

2. Click on Authorizations(xx) found at the top of the page. xx indicates the number of proposals waiting for approval/return for edit or reject.

Note! The system displays a list proposal with basic details.

3. Click on the Proposal Number that you want to Approve. The system displays detail for the proposal you selected. The user (branch manager) can click on “**View Premium Sheet**” to see further details of the selected proposal.
4. Click **Approve**. Note! The system displays “Authorization Completed Successfully.”
5. To Approve another policy, repeat steps 2 to 4.

## 5. Generate Policy Number

Purpose: To generate policy number

Steps to generate policy number

1. Login with user account (Login Id and Password) that has “Underwriter” role.
2. Go to Menu > Underwriting > Transactions > Print Policy
3. Click Add tab
4. Click Search
5. On the popup window
  - a) Select Product > Enter proposal number or Enter Date [optional]
  - b) Click **Retrieve**. The system displays approved policy (policies) that matched the search criteria.
6. Click on the record that you want to generate policy.

Note! The system fills Proposal Number textbox the proposal number selected.

7. Click **Generate Policy**. The system automatically generates a policy number.

## 6. Premium Receipt Order

Steps to order premium receipt

1. Login with user account (Login Id and Password) that has “**Underwriter**” role.
2. Go to Menu > Underwriting > Transactions > Print Policy
3. Click **Add** tab
4. From Premium From, select “**Policy Premium**”.

5. Click **Search**.
6. On the popup window
  - a. Enter **Policy Number**
  - b. Select **Product Name**
  - c. Click **Retrieve**
  - d. The system displays record based on the search criteria
  - e. Click on the record that you want to order premium receipt.

Note! The system fills the Host Branch, Date and the Reference Number.

7. Enter **Receipt Number**
8. On Premium Accounting Detail
  - a. Enter Prepaid Withholding Tax
  - b. Select Premium Receipt Mode

Note!

- If Cash is selected from Premium Receipt Mode, then Cash Amount will be displayed.
- If Cheque is selected from Premium Receipt Mode, then Cheque Amount will be displayed, and the user is required to enter other cheque details (Cheque Number, Cheque Date, Bank Name and Bank Branch)
- If Bank Remittance Advice is selected from Premium Receipt Mode, then Bank Remittance Advice Amount will be displayed, and the user is required to enter other details (Bank Remittance Advice Number, Bank Remittance Advice Date, Bank Name and Bank Branch)
- If CPO is selected from Premium Receipt Mode, then CPO Amount will be displayed, and the user is required to enter other details (CPO Number, CPO Date, Bank Name and Bank Branch)

9. Enter **Remark**

10. Click **Save**.

Note! The system generates a **voucher number** and displays a message “**Detail Saved Successfully**”.

## 7. Collect Premium

Collect premium (premium receipt order)

Steps to collect premium

1. Login with user account (Login Id and Password) that has “**Cashier**” role.
2. Go to Menu > General Ledger > Cashier Transaction
3. Click **Add** tab
4. Select **Receipt** from Transaction Type. (The **receipt** can be from **Policy Premium** and/or **Yellow Card**)
5. Click **Search**. The system displays record(s) under Cashier Transaction, if there are any.
6. Click on one of the records. The system fills Reference Number, Counter Party, Currency, Transaction Amount and Receipt Number.
7. Click **Save**. The record will move to transactions records.
8. From Transactions record click **Print**, sign on it, put stamp and (don't) handover to customer.

Caution: Don't save premium receipt order before you collect the premium amount.

### Delete uncollected premium receipt order

Incase if the information sent from the underwriter has error, the cashier can delete sent premium receipt order.

Steps to delete incorrectly sent premium receipt order.

1. Login with user account (Login Id and Password) that has “**Cashier**” role.
2. Go to Menu > General Ledger > Cashier Transaction
3. Click **Add** tab
4. Select **Receipt** from Transaction Type
5. Click **Search**. The system displays record(s) under Cashier Transaction, if there are any.
6. Click on one of the records. The system fills Reference Number, Counter Party, Currency, Transaction Amount and Receipt Number.
7. Click **Delete**.

**Note!** The Underwriter can now by filing the correct information and the user with Cashier role can collect the premium.

## 8. Print Policy

**Purpose:** to generate print policy Steps to print policy

1. Login with user account (Login Id and Password) that has “**Underwriter**” role.
2. Go to Menu > Underwriting > Transactions > Print Policy

3. Click **Inquire** tab
4. Click **Search**
5. On the popup window
  - a) Select **Product**.
  - b) Enter Policy Number and/or Customer Name and/or CIF Number.
  - c) Click **Retrieve**.
  - d) Click **Print Policy**.

## 9. Policy Renewal

**Purpose:** to renew policy

### 9.1 Policy Renewal Add Mode

Steps to renew policy

1. Login with user account (Login Id and Password) that has “**Underwriter**” role.
2. Go to Menu > Underwriting > Transactions > Policy Renewal.
3. Click **Add tab** (if the Add tab is not selected)
4. Click **Search**.
5. On the popup window
  - a) Select **Product**
  - b) Enter **Policy Number**
  - c) Enter Customer Name and/or CIF Number and/or Select Business Source [optional]
  - d) Click **Retrieve**. The system displays the desired policy
  - e) Click on the row to select the policy

Note! The system fills the policy details by adding 1 year to Policy Period (Policy Period from and Period To).

6. Click **Continue**

If necessary, make changes to **Risk Detail** and **Period Detail**.

7. Enter **Standard Risk Description**
8. Click **Save**.

Note! The system will generate a new **proposal number**. **Policy Number** will not be changed. **Policy Renewal Authorization** step is similar to **Proposal Authorization**.

## 9.2 Policy Renewal Modify Mode

**Purpose:** to modify a policy (renewal)

Steps to modify renewal policy

1. Login with user account (Login Id and Password) that has “**Underwriter**” role.
2. Go to Menu > Underwriting > Transactions > **Policy Renewal**.
3. Click **Modify tab**
4. Click **Search**.
5. On the popup window
  - a. Select **Product**
  - b. Enter **Policy Number**
  - c. Enter Customer Name and/or CIF Number and/or Select Business Source [**optional**]
  - d. Click **Retrieve**. The system displays the desired policy
  - e. Click **the policy**
6. Edit/Modify the policy. If necessary, make changes to **Risk Detail** and **Period Detail**.
7. Enter **Standard Risk Description**
8. Click **Update**.

## 10. Admin Control

Cashier role in Salaam Takaful is either to pay or receipt premium amount. Mode of receipt can be in cash or cheque.

Steps to do daily activities of cashier.

1. Login with user account (Login Id and Password) that has “**Cashier**” role.
2. Go to Menu > System Administration > Configuration > Admin Control.
3. Click Add tab (if the Add tab is not selected). Morning From 8:00AM to 8:15 AM
4. Make sure that Day Begin is selected and the next working day (transaction date) is shown in Processing date. The system automatically jumps each Sunday and Holiday days.
5. Click Process. System displays “Detail Saved Successfully!”

6. Click Logout and Login, to make use of the Processing Date as a transaction date. Make sure that at the top of the page is changed. During Day End (around 4:30 PM)
7. Go to Menu > System Administration > Configuration > Admin Control.
8. Make sure that Day End is selected.
9. Click **Process**. The system displays “**Detail Saved Successfully!**”.

## 11. Multiple ATP

Steps to do alteration to a policy

1. Login with user account (Login Id and Password) that has “**Underwriter**” role.
2. Go to Menu > Underwriting > Transaction > Multiple ATP.
3. Click **Search** (after policy number text box)
4. On the popup window
  - a) Enter **policy number**
  - b) Select **policy issue branch**
  - c) Select **product**
  - d) [**Optional**] Select business source or Enter CIF Number or Enter Customer Number.
  - e) Click **Retrieve**.

Note! The system displays a record(s) in a grid view or “no record is found” message.

5. Click the row that contains the details of the policy you want.
6. Select **No. of Alterations** (Single)
7. Select **Level** (**Policy Level** or **Risk Level** or **Risk Item Level**).
8. Select **ATP Type** (**Financial** or Non-Financial).
9. Select **ATP Identification**.

**Note!** ATP Identification list depends on Level (policy level, risk level or risk item level)

10. Click **Continue**

Based on the selected **level** and **ATP Identification** different kinds on alterations can be done.

**Note!**

- For all types of alterations **rate type** (Percent or Per mile) and **rate amount** remain unchanged.

## 11.1. Addition of Risk Identification

### Steps to do addition of risk identification

1. Login with user account (Login Id and Password) that has “**Underwriter**” role.
2. Go to Menu > Underwriting > Transaction > Multiple ATP.
3. Click **Search** (after policy number text box)
4. On the popup window
  - a) Enter **policy number**
  - b) Select **policy issue branch**
  - c) Select **product**
  - d) [**Optional**] Select business source or Enter CIF Number or Enter Customer Number.
  - e) Click **Retrieve**.

Note! The system displays a record(s) in a grid view or “no record is found” message.

5. Click the row that contains the details of the policy you want.
6. Select **No. of Alterations** (Single)
7. Select **Policy Level** from the Level options.
8. Select **ATP Type (Financial)**.
9. Select **Addition of Risk Identification** from **ATP Identification** dropdown list.
10. Click **Continue**
11. Select **Effective Date**
12. Select **Risk** from **Risk Identification** list.
13. Select **No of Risk Items** (Single or Multiple) and Number of Items (1 for single or >1 for Multiple)
14. Select **Premium Type** (New Premium Amount or Refund Premium Amount).
15. Click **Add**
16. Click **Enter Risk Detail**.
17. On the popup window, select **Risk Identification** (latest added) and Select **Items** then fill the form and click **Submit**.
18. Click Enter Peril Detail.
19. On the popup window, select **Risk Identification** (latest added) and Select **Items** then fill the form and click **Submit**.
20. Enter **Remark**.
21. Click **Save**.



Note! The system displays “**Details have been successfully Sent for Authorization**” message and shows the **New Premium Amount** or the **Refund Amount** and **ATP Reference Number**.

## 11.2. Deletion of Risk Item

To delete a risk item the policy should have at least **one risk identification** with two or more risk items.

### Steps to do Deletion of Risk Item

1. Login with user account (Login Id and Password) that has “**Underwriter**” role.
2. Go to Menu > Underwriting > Transaction > Multiple ATP.
3. Click **Search** (after policy number text box)
4. On the popup window
  - a) Enter **policy number**
  - b) Select **policy issue branch**
  - c) Select **product**
  - d) [**Optional**] Select business source or Enter CIF Number or Enter Customer Number.
  - e) Click **Retrieve**.

Note! The system displays a record(s) in a grid view or “no record is found” message.

5. Click the row that contains the details of the policy you want.
6. Select **No. of Alterations** (Single)
7. Select **Risk Item Level** from the Level options.
8. Select **ATP Type (Financial)**.
9. Select **Deletion of Risk Item** from **ATP Identification** dropdown list.
10. Click **Continue**
11. Select **Effective Date**
12. Select **Premium Type**
13. From the **Risk Identification** drop down select **Risk Identification**.
14. From the **Risk Item** drop down control select the **item** to be deleted.
15. Click **Delete**.
16. Enter **Remark**.
17. Click **Save**.

Note! The system displays “**Details have been successfully Sent for Authorization**” message and shows the **Refund Amount** and **ATP Reference Number**.

#### Admin Note

- Can we delete a risk item from a policy that have two risk identifications each with one risk item? **My View** is no, we can’t delete. If we delete one of the risk-items then indirectly we deleted the risk identification. That means the policy will remain with one Risk Identification and the process will be similar to Deletion of Risk Identification.

### 11.3. Deletion of Risk Identification

For a deletion of Risk Identification to work, a policy must have at least two risk identifications.

#### Steps to do Deletion of Risk Item

1. Login with user account (Login Id and Password) that has “**Underwriter**” role.
2. Go to Menu > Underwriting > Transaction > Multiple ATP.
3. Click **Search** (after policy number text box)
4. On the popup window
  - a) Enter **policy number**
  - b) Select **policy issue branch**
  - c) Select **product**
  - d) [**Optional**] Select business source or Enter CIF Number or Enter Customer Number.
  - e) Click **Retrieve**.

Note! The system displays a record(s) in a grid view or “no record is found” message.

5. Click the row that contains the details of the policy you want.
6. Select **No. of Alterations** (Single)
7. Select **Risk Level** from the Level options.
8. Select **ATP Type (Financial)**.
9. Select **Deletion of Risk Identification** from **ATP Identification** dropdown list.
10. Click **Continue**
11. Select **Effective Date**
12. From the grid view displayed, click **Delete** next to Risk Item.
13. Enter **Remark**.

14. Click **Save**.

Note! The system displays “**Details have been successfully Sent for Authorization**” message and shows the **Refund Amount** and **ATP Reference Number**.

#### 11.4. Addition of Risk Item

#### 11.5. Addition of Risk Identification

- Days from effective date to period to are included i.e., date difference plus one day
- Total sum insured must be entered. The system will calculate how much should be paid (collected) for the rest of the period.
- Total Peril Amount must be entered (if any). The system will calculate how much should be paid for the rest of policy period.

#### 11.6 Cancellation of Policy by AIC

#### 11.7 Change in Sum Insured

#### 11.8 Cancellation of Policy with Full Premium Refund

- (Stamp Duty amount) 5 birr is included in the refund amount. Is that correct?

### 11.2 ATP Modify Mode

#### Refund

- If daily collection is zero and there is a refund amount to be paid for the participant then from which should the cashier pay?

## 12. Motor Certificate

### 12.1 Register Motor Certificate Number

**Purpose: To register Motor Certificate Numbers**

1. Login to the system with **Underwriter Officer** role
2. Menu > System Administration > Motor Certificate
3. Being on **Add** Tab, Select **Motor Certificate** from **Inventory Type**

The screenshot shows the 'Add Inventory' tab selected in a window with four tabs: 'Add Inventory', 'Distribution to Branch', 'Return from Branch', and 'Return Inventory'. The form contains the following fields and buttons:

Date of Receipt	<input type="text"/>	Series Reference	<input type="text"/>	Serial Number From	<input type="text"/>
Serial Number To	<input type="text"/>	Number of Leaves	<input type="text"/>		
<input type="button" value="Save"/>	<input type="button" value="Delete"/>	<input type="button" value="Reset"/>			

4. Click **Add Inventory** Tab is not selected.
5. Select **Date of Receipt**
6. Enter **Series Reference**, **Serial Number from** and **Serial Number To**

Note! Clicking anywhere in the window, Number of leaves will be shown.

7. Click **Save**

### 12.2 Assign Motor Certificate to a Branch

**Purpose: To assign Motor Certificate Numbers (range) for branches**

1. Login to the system with **Underwriter Officer** role
2. Menu > System Administration > Motor Certificate
3. Click **Add** Tab, Select **Motor Certificate** from **Inventory Type**

The screenshot shows the 'Distribution to Branch' tab selected in a window with four tabs: 'Add Inventory', 'Distribution to Branch', 'Return from Branch', and 'Return Inventory'. The form contains the following fields and buttons:

Branch Name	--Select Branch--	Series Reference	--Select--	Serial Number From	<input type="text"/>
Serial Number To	<input type="text"/>	Number of Leaves	<input type="text"/>		
<input type="button" value="Assign"/>	<input type="button" value="Delete"/>	<input type="button" value="Reset"/>			

4. Click **Distribution to Branch** Tab
5. Select **Branch Name** from the dropdown list
6. Select **Series Reference** from the dropdown list
7. Enter **Serial Number From**
8. Enter **Serial Number To**

Note! Clicking anywhere in the window, Number of leaves will be shown.

- Click **Assign**

## 12.3 View assigned Motor Certificates

**Purpose: To view Motor Certificates assigned for Branches**

- Login to the system with **Underwriter Officer** role
- Menu > System Administration > Motor Certificate.
- Click **Inquire** Tab, Select **Motor Certificate** from **Inventory Type**

[Distribution to Branch](#)
[Return from Branch](#)
[Return Inventory](#)

Branch Name	Finfinee Grand Main Branch	Series Reference	MTCM(5294801 - 5294850)	Serial Number From	
Serial Number To		Number of Leaves			
<input type="button" value="Save"/>	<input type="button" value="Delete"/>	<input type="button" value="Reset"/>			

- Click **Distribution to Branch** Tab (if not selected)
- Select **Branch Name** from the dropdown list
- Select **Series Reference** from the dropdown list

Note! System will display a grid view containing details of Motor Certificate

Date of Receipt	Branch Name	Series Reference	Serial Number From	Serial Number To	Reason for Return	-
29/05/2023 00:00:00	Finfinee Grand Main Branch	MTCM	5294801	5294850		10

## 13. Motor Certificate Issue

### 13.1 Motor Certificate Issue [Add Tab]

**Purpose: To allocate Motor Certificate**

To allocate Motor Certificate follow the following steps

- Login to the system with **Underwriter** role
- Menu > Underwriting > Transactions > Motor Certificate Issue
- Being on **Add** Tab, Select **Motor Certificate** from Issue Type dropdown list
- Click **Search** Button next to Policy Number
- On the popup window
  - Enter policy number and Select Product Name
  - Click **Retrieve**
  - Click the row to select (from the resulting grid view)

Note! A grid view that contains Risk Detail, Risk Item Details, Unique Id, RRI Input Value will be shown

Risk Detail	Risk Item Details	Unique Id	RRI Input Value	-	Allocate
Land Cruisers	LAND CRUISERS	Plate No	ET-CD-20-055	3338	<input checked="" type="checkbox"/>
Land Cruisers	LAND CRUISERS	Plate No	ET-CD-20-054	3339	<input checked="" type="checkbox"/>
Solely PVT-Automobiles	TOYOTA COROLLA	Plate No	ET- CD-20-046	3340	<input checked="" type="checkbox"/>

6. Click **Search** Button next to Series Reference
7. On the popup window
  - a. Click Retrieve
  - b. Click the row to select (from the resulting grid view)

**Note!** Series Reference and Serial Number From textboxes are filled with the appropriate values.

Enter Serial Number To (based on the number of risks) > Click anywhere in the window.

The number of leaves will be shown (Note! The number of risks and number of leaves must be equal)

8. Click Check Button (if the number of risks and number of leaves are equal Allocate button will be active)
9. Click **Allocate**

### 13.2 Motor Certificate Re-allocation [Add Tab]

**Purpose:** To allocate Motor Certificate

To allocate Motor Certificate follow the following steps

1. Login to the system with **Underwriter** role
2. Menu > Underwriting > Transactions > Motor Certificate Issue
3. Being on **Add Tab**, Select **Motor Certificate Issue In lieu of Damage/Lost** from Issue Type dropdown list
4. Click **Search** Button next to **Policy Number**
5. On the popup window
  - a. Enter **policy number** and Select **Product Name**
  - b. Click **Retrieve**
  - c. Click the row to select (from the resulting grid view)
6. Select **Risk Name**

**Motor Certificate / Yellow Card Issue**

**Basic Information** | **Proposal Details**

Branch: Finnee Grand Main Branch | Issue Type: Motor Certificate Issue in lieu of Damage / Lost | Policy Number: AIC/FFN/CMTP/000006/12 | Search

Risk Name: -----Select----- | Risk Item Details: | Search | Add | Cancel

Save | Delete | Reset

7. Click **Search** Next to Risk Item Details Textbox.
8. On the popup window
  - a. Select Risk Related Input (Plate Number, Chassis Number, Engine Number) or Click retrieve
  - b. Select row

Risk Related Input	<div> <div>-----Select-----</div> <div> Plate Number  Chassis Number  Engine Number </div> </div>	Value	<input type="text"/>
<div>Retrieve</div>			

Risk Item Reference	Risk Dimension Name	Risk Dimension Value
TOYOTA AUTOMOBILE-SI=0	Motor TP No of Passengers	4
TOYOTA AUTOMOBILE-SI=0	Motor Purpose of Vehicle	PRIVATE USE
TOYOTA AUTOMOBILE-SI=0	Plate No	02-78776 AA
TOYOTA AUTOMOBILE-SI=0	Chassis No	JT1EOEE8000091208
TOYOTA AUTOMOBILE-SI=0	Engine No	2E-1222085
TOYOTA AUTOMOBILE-SI=0	Year of manufacture	1985
TOYOTA AUTOMOBILE-SI=0	Motor Cylinder Capacity TP Compulsory Auto	1295
TOYOTA AUTOMOBILE-SI=0	Make of vehicle	TOYOTA

Motor Certificate / Yellow Card Issue

Basic Information

Proposal Details

Branch

Finfinee Grand Main Branch

Issue Type

Motor Certificate Issue in lieu of Damage / Lost

Policy Number

AIC/FFN/CMT/000006/12

Search

Risk Name

SOLELY PVT- AUTHOMOBILES

Risk Item Details

TOYOTA AUTOMOBILE-SI=0

Search

Add

Cancel

Save

Delete

Reset

- c. It fills Risk Item Details (by SI)
- d. Click Add

Risk Name	-----Select-----	Risk Item Details	<input type="text"/>	Search	Add	Cancel
-----------	------------------	-------------------	----------------------	--------	-----	--------

Risk Details	Risk Item Details	Unique ID	RRI Input Value	Certificate Number	Reallocate	Delete	
SOLELY PVT- AUTHOMOBILES	TOYOTA AUTOMOBILE	Plate No	02-78776 AA	MTC/464392	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Reallocate

- e. Click Reallocate

Risk Details	Risk Item Details	Unique ID	RRI Input Value	ReAllocated Certificate Number	Edit
SOLELY PVT- AUTHOMOBILES	TOYOTA AUTOMOBILE	Plate No	02-78776 AA	CMT/6786	

Amount Due Details

Premium Adjustment

No

Cost/Certificate

13.85

No of Certificates

1

Total Certificate Cost(Transaction)

13.85

Save

Delete

Reset

- f.
- g. Click Save

Note! A grid view that contains Risk Detail, Risk Item Details, Unique Id, RRI Input Value will be shown

9. Click **Search** Button next to Series Reference

10. On the popup window

- a. Click Retrieve
- b. Click the row to select (from the resulting grid view)

**Note!** Series Reference and Serial Number From textboxes are filled with the appropriate values.

Enter Serial Number To (based on the number of risks) > Click anywhere in the window.

The number of leaves will be shown (Note! The number of risks and number of leaves must be equal)

11. Click Check Button (if the number of risks and number of leaves are equal Allocate button will be active)
12. Click **Allocate**

### 13.3 Motor Certificate Issue Approval

Purpose: To Approve Motor Certificate Reallocation

1. Login to the system with **Branch Manager** role
2. Click Authorizations(xx)
3. Click **Motor Certificate Issue in lieu of Damage / Lost (Customer) (1)** from Authorization Basket
4. Click

Motor Certificate Issue in lieu of Damage / Lost (Customer)	Action	Performed By	Performed On	Status	Authorization Completed	Authorised On	Authorization Awaited
MCDLCISSUE-AIC/FFN/CMTP/000018/12	Added	Bekuma	19/07/2023	Waiting			Manager Main Branch/Deputy Main Branch Manager

Motor Certificate Issue in lieu of Damage / Lost (Customer)	Action	Performed By	Performed On	Status
MCDLCISSUE-AIC/FFN/CMTP/000018/12	Added	Bekuma	19/07/2023	Waiting

- 5.
6. Click Motor Certificate Issue In lieu of Damage Number

**Motor Certificate / Yellow Card Issue**

Basic Information

Proposal Details

Branch

Finnee Grand Main Branch

Issue Type

Motor Certificate Issue in lieu of Damage / Lost

Policy Number

AIC/FFN/CMTP/000018/12

Risk Details

SOLELY PVT- AUTOMOBILES

Risk Item Details

AUTOMOBILE

Unique ID

Plate No

RRI Input Value

2-23973 AA

Certificate Number

CMTP/6785

ReAllocated Certificate Number

CMTP/6785

Amount Due Details

Premium Adjustment

No

Cost/Certificate

13.85

No of Certificates

1

Total Certificate Cost(Transaction)

13.85

Authorization Remarks

Authorization Remark

Approve

Reject

7. Enter **Authorization Remark**
8. Click **Approve**

### 13.4 Motor Certificate Premium Receipt Order

1. Login to the system with underwriter account
2. Menu > Underwriting > Transaction > Premium Receipt Order



### 3. Select Policy Premium

**Premium Due** **Policy / Proposal Details**

**Premium Receipt Order**

Host Branch:  Date:  Voucher Number:

Premium From:  Reference Number:  Search:  ☐ Manually Received

Product Name	ATP Reference	Due Date	Amount Due	Stamp Duty	Passenger Tariff	Certificate Cost	Balance	Payment Status	Currency
Motor		28/07/2022	856.40	5	160 101.64	13.85	1136.89	Paid	Birr
Motor		19/07/2023	0	0	0	13.85	13.85	Unpaid	Birr

**Premium Accounting Details**

Stamp Duty:  Prepaid Withholding Tax:  Net Premium:

Balance:  Receipt Amount:   Passenger:

Tariff:  Certificate Cost:

Premium Receipt Mode:

Remarks:

[Save](#) [Delete](#) [Reset](#) [View Policy Details](#)

### 13.5 Motor Certificate Issue [Inquire Tab]

Purpose: To print motor certificate

- Login to the system with **Underwriter** role
- Menu > Underwriting > Transactions > Motor Certificate Issue
- Being on Inquire Tab, Select Motor Certificate from Issue Type dropdown
- Click **Search** Button next to Policy Number
- On the popup window
  - Enter policy number > Select Product Name
  - Click **Retrieve**
  - Click the row to select (from the resulting grid view)

Note! A grid view will be displayed.

Risk Detail	Risk Item Details	Unique Id	RRI Inpute Value	Certificate Number	Risk Id	Id	
Land Cruisers	LAND CRUISERS	Plate No	ET-CD-20-055	5108451	3338	1	<a href="#">Print</a>
Land Cruisers	LAND CRUISERS	Plate No	ET-CD-20-054	5108452	3339	2	<a href="#">Print</a>
Solely PVT- Automobiles	TOYOTA COROLLA	Plate No	ET- CD-20-046	5108453	3340	3	<a href="#">Print</a>

- Click **Print** next to each risk detail.

**Note!** If a policy has more than one risk then clicking print will shows the premium tariff, insurance fund tariff and other details of each risk of the policy.

## 14. Motor Certificate Issue Update

Branch:  Inventory Type:  Reason for Return:

Series Reference:  Search:  Remark:  Print Error:  Go:

**Purpose:** To update allocated motor certificates

1. Login to the system with **Underwriter** role
2. Menu > Underwriting > Transactions > Motor Certificate Issue Update
3. Select **Motor Certificate** from **Inventory Type** dropdown
4. Select your reason to update from **Reason for Return** dropdown
5. Click **Search** Button next to **Series Reference**
  - a) On the popup window Click **Retrieve**
  - b) Click the row to select (from the resulting grid view)

Note! Series Reference and Serial Number From textboxes are filled with the appropriate values.

6. Enter your remark in the **Remark** textbox
7. Click **Go** button
8. Select check box (boxes) next to Certificate Number that match your Reason for Return

	Series Reference	Certificate Number	Select All
1	MTCM(5108451 To 5108500)	5108451	<input checked="" type="checkbox"/>
2	MTCM(5108451 To 5108500)	5108452	<input checked="" type="checkbox"/>
3	MTCM(5108451 To 5108500)	5108453	<input checked="" type="checkbox"/>
4	MTCM(5108451 To 5108500)	5108454	<input type="checkbox"/>
5	MTCM(5108451 To 5108500)	5108455	<input type="checkbox"/>
6	MTCM(5108451 To 5108500)	5108456	<input type="checkbox"/>
7	MTCM(5108451 To 5108500)	5108457	<input type="checkbox"/>
8	MTCM(5108451 To 5108500)	5108458	<input type="checkbox"/>
9	MTCM(5108451 To 5108500)	5108459	<input type="checkbox"/>
10	MTCM(5108451 To 5108500)	5108460	<input type="checkbox"/>

9. Click **Save** Button.

Note! If you select **Damaged, Void or Others** for Reason for Return then you can allocate another certificate number (re-allocate) for that policy in **Motor Certificate Issue** page.

## 15. Motor Certificate Report

**Purpose:** to view motor certificate report

1. Menu > Reports > Motor Certificate Report

[Add](#) [Modify](#) [Delete](#) [Inquire](#)

**Motor Certificate Report**

Branch	--Select Branch Unit--	Inventory Type	--Select --	Reason for Return	--Select --
Date From		Date To			
<a href="#">Show</a>	<a href="#">Reset</a>				

2. Select **Branch**. [Optional]

Note!

- A user from any branch can view Motor Certificate Report of his/her branch only.
- A user from head office can view motor certificate report of

- all branches (if Branch is not selected from dropdown list) or
  - a specific branch (if that specific branch is selected in the dropdown list)
3. Select **Motor Certificate** from **Inventory Type** dropdown list
  4. Select **Reason from Reason** for Return dropdown list
  5. Select **Date from** and **Date to**.
  6. Click **Show** Button.

## 16. Yellow Card Proposal

Steps to write yellow card proposal

1. Login to the system with **Underwriter** role
2. Menu > Underwriting > Transactions > Yellow Card Proposal
3. Select Pre-requisite Policy Name
4. Click **Search**
5. On the popup window, enter policy number and/or other details then click **Retrieve**.
6. From the result grid view click on any row to select
7. If necessary, Edit **Yellow Card Covered Period from** and **Yellow Card Covered Period to**.
8. Select **Unique RRI**, then value of the selected Unique RRI will be shown in next textbox.
9. Select **Type of Vehicle**
10. Select a country from **Countries Covered** and Click on an arrow button.  to pass all countries or  to pass selected country only.

*In the Amount Due Details*

11. Enter **Handling Charge**
  12. Enter **AIC Premium Amount Due**
  13. Enter **COMESA Portion Gross Premium**.
- 
10. Click **Add**
  11. If you want to enter detail for another item in the policy then go through **steps 8 to 14**.
  12. Enter **Remark**
  13. Click **Save**

## 17. Yellow Card Proposal Approval

Steps to Approve Yellow Card Approval

1. Login to the system with **Branch Manager** role
2. Click on Authorizations (\*\*) found at the top of the page.
3. Click on Yellow Card Proposal (\*\*)
4. Click on the Yellow Card Proposal Number that you want to **Approve**. The system displays detail for the yellow card proposal you selected.

## 18. Yellow Card - Premium Receipt Order

Steps to order premium receipt for yellow card

1. Login with user account (Login Id and Password) that has “**Underwriter**” role.
2. Go to Menu > Underwriting > Transactions > Print Policy
3. Click **Add** tab
4. From Premium From, select “**Yellow Card Proposal**”.
5. Click **Search**, next to Reference Number.
6. On the popup window
  - a. Enter **Policy Number**
  - b. Select **Product Name**
  - c. Click **Retrieve**
  - d. The system displays record based on the search criteria
  - e. Click on the record that you want to order premium receipt.

Note! The system fills the Host Branch, Date and the Reference Number.

7. Enter **Receipt Number**
8. Select **Premium Receipt Mode**
9. Enter **Remark**
10. Click **Save**.

Note! The system generates a **voucher number** and displays a message “**Detail Saved Successfully**”.