

## User Guide Manual - Evolution



By

Cognisun Infotech Pvt Ltd



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# 1. CONTACT MANAGEMENT

## 1.1 HOW TO CREATE A NEW CONTACT

Dashboard V0.9.1.2020.02.21.18.10.00 en: QA Welcome Hilmar

Home / Contact Management

Find any details from Global search Global Search

Sort out button Add Contact button

Code	Name/Company	Phone	Email	Country	Business Type	Contact Type	Action
15	Allied Radio	+353 98 988 5 8550	Isobel.Phillips123@yopme	Ireland	Advertising	Service Center	
36	Miss Bhoomi Trivedi	+34 123123	bhoomi.cognisun@gmail.	Spain	Information Technology	Client	
12	cogmaster	+353 98 656 5 3200	cognisun123@yopmail.co	Ireland	Advertising	Insurance Company	
10	Mrs. ddd gggg	+43 43 434 3 43	fdgh@gt.pg	Ireland	Information Technology	Client	
2	Mr. Dinesh sonagara	+91 79 98 985 6 5652	diensh123@yopmail.com	Ireland	Public Relations	Approver Repairer	
13	Dr. George Ferray	+353 16 525 4 5214	manish@gmail.com	Ireland	Doctor	Sub-Agent	
14	Mr. Hilmar Sigurgeirsson	+353 42 356 0 1120	Hilmar123@yopmail.com	Ireland	Agriculture	Internal Staff	
27	Mr. James Horton	+353 45 125 3 1254	manishstar@gmail.com	Ireland	Advertising	Client	
21	Mr. Jay Shah	+353 94 513 8 7513	jay@yopmail.com	Ireland	Agriculture	Client	
17	Mr. John mehta	+353 98 854 5 20	john1234@yopmail.com	Ireland	Agriculture	Client	

1 to 10 out of 31 records

-View Contact - Delete Contact - View Policy of Contact


- New policy for Contact To create brand new contact.

## 1.2 ADD NEW CONTACT

[Home](#) / [Add New Contact](#)

Fields marked with \* are mandatory

**Contact# 35417**



**Contact Type\***

Client

**Company Name**

Company Name

**Name**

**Title\***  **Forename\***  **Surname\***  **Salutation\***

**Passport Number**  **Passport Country**  **Business Type\***

**Gender\***   **DOB\***

**Address**

**Country\***

**Line1\***

**Line2**

**Line3**

**County / Province\***  **Town**  **Postal Code**

**Phone**

**Type\***  **Country Code\***  **Phone\***

**Email**

**Type\***  **Email\***

**Contact Preference**

☒ Ok to Contact ☐ Do not Contact

**Contact Mode**

☐ By Phone ☐ By Email ☐ By Post ☐ By Text Message

**Document Delivery\***

☐ Email ☐ Post ☐ Both

**Notes**

**Create New Login ?**

☒ No ☐ Yes

- \* after any label indicates mandatory field in the screen.
- User can change his/her profile picture by clicking on Pencil icon over the default image.
- User can select Contact Type and select either Individual or Company.
- Company name field is mandatory when you selected Company button.
- Select Title from the Title Drop down and based on selection Gender will be filled automatically.

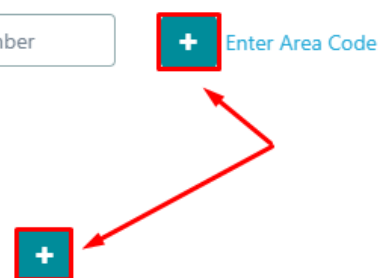
- Salutation will be filled automatically same like Forename field value.
- Select Passport Country, enter Passport number and Business Type.
- Birth date (Individual cannot be less than 12 yrs. of age.)
- Select Country from the drop-down list If you have selected Country from the drop down when you enter character then system will show list of County / Province for the selected country.
- Address line 1 is mandatory.
- County / Province is mandatory.
- User's individual one email id and one contact number is mandatory.
- Individuals will have to click plus icon to add user email and phone details as shown below.

### Phone

Type\*  Country Code\*  Phone\*  + Enter Area Code

### Email

Type\*  Email\*  +



- In the Phone section we can add Business, Home and Mobile type of Phones for the new/existing contact. We can also enter Area code.
- In the Email section anyone can create/update Emails for Work and Personal type of emails.
- You can set email or Phone Primary by just clicking on link Make Primary.
- Primary contact number and email id will be used to contact individual and also to login in the system.

### Phone

Type\*  Country Code\*  Phone\*  + Enter Area Code

Business	+353 984561	Primary		
Business	+353 99 874 6 516	Make Primary		

- Contact would be only accessible by selecting from Contact Preference and Contact mode.

**Contact Preference**

☒ Ok to Contact

☐ Do not Contact

**Contact Mode**

☒ By Phone

☒ By Email

☐ By Post

☐ By Text Message

- Individual can also select if he/she want to create login account or not as shown below

Create New Login ?

☒ No    ☐ Yes

✓ Save

< Back

- When you click on Save button new contact will be created and System will ask if he/she want to Set up a new policy for the same contact.

The screenshot shows the Cognisun Yachtsman dashboard. A modal dialog box titled "Set up a new policy ?" is open, asking "Do you want set up a new policy ?" with "No" and "Yes" buttons. A red arrow points from the "Save" button in the background to the "Yes" button in the dialog. A green notification banner at the top right says "Contact details saved successfully". The background form includes fields for "Type\*" (Work), "Work" (test123@gmail.com, newe12@gmail.com), "Contact Preference" (Ok to Contact, Do not Contact), "Document Delivery\*" (Email, Post, Both), and "Notes". A red message at the bottom of the form states: "Once you save Contact Systeem will save the new contact and ask to Setup the new Policy."

## 1.3

## VIEW CONTACT

- By clicking on Expand Button, the following Dialogue box will be opened:

Dashboard V1.0.4.2.2020.03.02.14.30.00 env: DEV Welcome Hilmar

**Williams Lyons Insurances** (Sub-Agent) +999 099 9999 noemail@yachtman.ie

Multi Agency Intermediary

**Contact Details**

**Phone**  
Mobile +999 099 9999

**Email**  
Work noemail@yachtman.ie

**Address**  
113 Main Street  
Castleisland  
Kerry  
Ireland

**Contact Preference** Do not Contact  
**Contact Mode**  
**Document Delivery** Post

Expand Button

- If any individual clicks on Edit button and that contact type is a “client”, then verification is required.

Dashboard V1.0.4.2.2020.03.02.14.30.00 env: DEV Welcome Hilmar

Home / View Contact

**Contact# 35415**

**Nikki R**  
Agriculture Rui  
Gender: Female

**Edit Contact Details**

DOB 14/05/1989 Select

Mobile +44 75 321 8 8 Select

Postal Code PE28 5US Select

Comment

Verification Failed Verification Done



- If there is any incorrect details, Individuals would need to add comment and select verification done Tab (as per below dialogue box):
- Selection of all the fields are mandatory to be filled.

**Edit Contact Details**

DOB: 14/05/1989 (Incorrect)

Mobile: +44 75 321 8 8 (Correct)

Postal Code: PE28 5US (Correct)

Comment: [Empty text box]

Buttons: ✖ Verification Failed, ✔ Verification Done

Background Message: Please add comment to verify user

- If all the details are correct, then there is no need to comment for verification.

**Edit Contact Details**

DOB: 14/05/1989 (Correct)

Mobile: +44 75 321 8 8 (Correct)

Postal Code: PE28 5US (Correct)

Comment: [Empty text box]

Buttons: ✖ Verification Failed, ✔ Verification Done

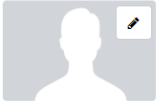
- After Verification is done, Individual will be redirected to Edit Contact Detail Page (as per below mentioned dialogue box)

**Yachtsman** Dashboard V1.0.4.2.2020.03.02.14.30.00  
env: DEV Welcome Hilmar

Home / Edit Contact

Fields marked with \* are mandatory

### Contact# 35415



**Contact Type\***

Client

**Company Name**

**Name**

**Title\*** 
**Forename\*** 
**Surname\*** 
**Salutation\***

**Passport Number** 
**Passport Country** 
**Business Type\***

**Gender\***  
**DOB\***

### Address

**Country\***

**Line1\***

## 2. POLICY MANAGEMENT

### 2.1 NEW POLICY CREATION

- Individual can search his/her contact name for new policy creation.
- If Individual cannot find his/her name then he/she can create new contact by clicking on



button.

Yachtsman  
Specialists in Marine Insurance

Dashboard V1.0.4.2.2020.03.02.14.30.00  
env: DEV

Welcome Hilmar

Home / NewPolicy

Contact Name or ID

Search contact name

Parl

Campion & Sparrow | 9999 | Ireland

Mr. Parth Solanki | 132465789 | Ireland

Mr. Parth Solanki | 123465789 | Ireland

Mr. Parth Solanki | 984651651 | Ireland

Mr. Parth Soni | 98456145 | Ireland

Sparrow Insurances | 9999 | Ireland

+ New Policy Setup

- After searching & selecting contact, individual can create brand new policy setup as mentioned screenshot:

The screenshot displays the Yachtsman Euromarine web application interface. At the top, the header includes the Cognisun logo on the left, the Yachtsman Euromarine logo on the right, and a 'Welcome Hilmar' message. The main content area is titled 'Home / NewPolicy'. A search bar labeled 'Contact Name or ID' contains the text 'Mr. Parth Solanki|132465789|Ireland'. Below the search bar, a message states 'Please enter min 3-4 characters to search'. To the right of the search bar is a magnifying glass icon and a plus sign icon. A red arrow points from the search bar to a contact card on the right. The contact card displays the following information: 'Mr. Parth Solanki (#42)', 'Main st Manorhamilton, Manorhamilton, Ireland', '+353 13 246 5 789', and 'parthsolanki@yopmail.com'. Below the contact information is a button labeled '+ New Policy Setup'.

## 2.2

## NEW POLICY QUOTATION

- Fill the data as mentioned in screenshot:

Dashboard
V1.0.4.2 2020.03.02 14:30:00
env: DEV
Welcome Hilmar

Home / CreatePolicy

### New Policy Quotation

Country \*

Ireland

Policy Type \*

Vessel

Document Language \*

English

Currency \*

EUR

Refer

Policy Effective Date

03/03/2020

Department \*

Direct

Class \*

Barge

Type \*

Wide Barge (Non Tidal)

Vessel Name

abc

Use of Vessel \*

Private Use Only

Hull Material \*

Aluminium

Make & Model \*

1998

Length (meters) \*

100

Type of Build \*

Converted

Year Built \*

1999

Year Purchased \*

Year Purchased

Purchase Price \*

123

Sum Insured \*

123

Sum Insured Method \*

Market Value

Last Survey Date \*

31/11/2015

Where is boat registered? \*

Belgium

Where is the boat Moored? \*

Aboard

Mooring Type \*

Launch & Retrieve

### Engine & Trailer Details

Main Engine(s) \*

2

HP \*

2000

Year \*

1999

No of Engines \*

Twin

Transmission \*

Jetdrive

Auxiliary Engine

Auxiliary Engine

HP

Year

No of Engines

Select

Transmission

Select

Max Speed (Knots)\*

12

Make of Trailer

Make of Trailer

Trailer Serial No.

Trailer Serial No.

### Navigational Limits

Cruising Range \*

Coastal Waters of Germany

Additional Cruising Range

Additional Cruising Range

### General Questions

Previous Boating Experience (Years)\*

1

Select your NCB (Years)\*

1

Previous Insurer

Previous Insurer Name

Previous Policy No.

1111

Boating Qualifications

Select

Advanced Powerboat Certificate

Any Losses in last 5 years? \*

Yes

Describe

test

Has the insurance been canceled or refused? \*

No

Has been Convicted or Charged? \*

No

Has the vessel ever been damaged? \*

No

### Limits / Additional Cover

Third Party Liability \*

3,000,000


Back to policy list

Generate Quotation

Click on Generate Quotation, after filling up the data

- Click on Generate Quotation after filling up the data.

- 1) Notes: Notes will be system generated.
- 2) Policy Number: shows your policy number.
- 3) Vessel Type: shows vessel type.
- 4) Policy Status: shows policy status either it is "Active" or in "Quotation".
- 5) Policy Referred: shows policy is referred or not.
- 6) Policy Referred checkbox: individual can uncheck for manually referred policy.
- 7) Total Policy: shows total number policies are created for same contact. On clicking of that number individual is redirected to the policy list page, at their individual can see all the created policy of that particular contact.
- 8) Total Claims: shows total number of claims individual had claimed.
- 9) Policy Type/Language/Currency: Click on Pencil icon to change accordingly.



Dashboard
V1.0.4.2.2020.03.02.14.30.00  
env: DEV

Welcome Hilmar

Home / Policy

Recompute Premium
Bind Policy
New Claim
New Policy

1 \*Policy is Referred as Vessel Year Built is more than 20 years

2 Policy 48322
3 Wide Barge (Non Tidal)
4 Quotation
5 Referred
6 Refer ☒
7 Policies 3
8 Claims 0

Policy Holder Parth Solanki
Email parthsolanki@yopmail.com
Phone +353 13 246 5 789
Country Ireland

9 Policy Type Vessel
9 Language English
9 Currency EUR

- Referring to the above clause "6", if we uncheck & check again the refer check box, then system generated note will be changed to manually referred (as mentioned below):

Recompute Premium
Bind Policy
New Claim
New Policy

\*Policy is Manually Referred

Policy 48322
Wide Barge (Non Tidal)
Quotation
Referred
Refer ☒
Policies 3
Claims 0

- Click on Eye icon to view the summary details.

### Summary

All values are in EUR.

Total Sum Insured 1500

Rate 0 %

Starting Premium 54.05

Adjustments 225

Adjusted Premium 279.05

No Claim Bonus 13.95

Local Tax 24.52


Admin Fees 35

Add Ons 0

Total Due 324.62

Excess 50

Commission 27.5

To view summary details 

- After clicking view icon, the summary detail will be shown as mentioned.

Yachtsman Euromarine

Dashboard V1.0.4.2020.03.02.14.30.00

Welcome Hilmar

Home / Policy

\*Policy is Referred as V

Policy 34440

Policy Holder

Policy Type

Summary

All values are in EUR.

Total Sum Insured 1500

Rate 0 %

Starting Premium 54.05

Adjustments 225

Summary Details

Policy Number 34440 Type New Business Country Ireland

Ins. Company Lloyd's Insurance

Agency

Vessel Class Canoe & Kayak Vessel Type Canoe & Kayak

Sum Insured 1,500 Inception Date Date 25-02-2020

Base Rating 0.00% Absolute 54

Min Premium 750.00 Starting Premium 54

Question	Response	Rate	Rate Applied To	Reference Amount	Absolute	Amount
THIRD_PARTY_LIABILITY	6500000.00	15.00	SumInsured	1,500	0	225
AUXILIARY_ENGINE_TRANSMISSION		0.00	StartingPremium	54	0	0
MAIN_ENGINE_TRANSMISSION	Outboard	0.00	StartingPremium	54	0	0
HULL_MATERIAL	Aluminium	0.00	SumInsured	1,500	0	0
TYPE_OF_BUILD	Production	0.00	StartingPremium	54	0	0
CRUISING_RANGE	Coastal water of Spain Including Gibraltar (Exclud	0.00	StartingPremium	54	0	0
CREW_LIABILITY		0.00	StartingPremium	54	0	0

- Warning message will be displayed in warning dialogue box.

### Warnings / Messages / Reminders

Warnings / Messages / Reminders

## Policy Vessel Tab

- 1) Expand button for all Tab
- 2) Edit Button: To edit all the data from the column
- 3) Vessel Tab: Individual Expand button for Vessel
- 4) Engine and Trailer Detail Tab: Individual Expand button for Engine & Trailer Detail
- 5) Tender/Auxiliary Vessel Tab: Individual Expand button for Tender/Auxiliary Vessel
- 6) Sum Insured Tab: Individual Expand button for Sum Insured Detail

The screenshot shows the 'Vessel' tab selected in a navigation bar. Below the navigation bar, there is a list of tabs with expand buttons (chevron icons) on the right side. The tabs are: Vessel, Engine and Trailer Details, Tender/Auxiliary Vessel, and Sum Insured. The expand buttons are numbered 1 through 6, corresponding to the list items in the previous block.

- Any Individual can edit his/her vessel details by clicking on pencil button (as mentioned in screenshot):

The screenshot shows the 'Vessel' details form. It contains several fields: Vessel Class (Canoe & Kayak), Vessel Type (Canoe & Kayak), Vessel Name (Celebration), Make & Model\* (Honda), Type of Build\* (Production), and Year Built\* (2015). A red box highlights the 'Vessel Class' and 'Vessel Type' fields, with a red arrow pointing to a pencil button on the right, labeled 'for edit vessel class and type'.



- Navigation Equipment value should be matched with the total of Itemised Breakup & same for the Sails, Canopy & Covers.

Navigational Equipment	1000	Itemised Breakup
Sails, Canopy & Covers	1000	Itemised Breakup
Portable Generator	0	
Custom Coverage	0	
<b>Total Sum Insured</b>	<b>3500</b>	

[< Back to policy list](#)
[✓ Save](#)
[✕ Cancel](#)

Referring to the above screenshot, the value of “1000” should be matched in the navigation Equipment details as mentioned in the screenshot.

Navigational Equipment

Equipment Nav.	Model/Description/Value (€)
Radar	500
Sonar	
GPS	500
Plotter	0
Combined Equipment	0
VHF	0
Radio Beacon	0
Auto Pilot	0
BLU	0
Slide	0
Wind Equipment	0
Tridata	0
Others 01	0
Others 02	0
Others 03	0
Others 04	0
<b>Total</b>	<b>1000</b>

✓ OK

## Policy Underwriting Tab

- 1) Expand button for all Tab
- 2) Edit Button: To edit all the data from the column
- 3) Policy & Dates Tab: Individual Expand button for policy & dates detail
- 4) Policy Options & Adjustment Tab: Individual Expand button for Policy Options & Adjustment
- 5) Limits/Additional Cover & Commission & Fees and Levy's Tab: Individual Expand button for Limits/Additional Cover & Commission & Fees and Levy's
- 6) Rating/Excess Tab: Individual Expand button for Rating/Excess Tab

- 1) Click on Back to policy list, it will take you to the policy list.
- 2) Click on Save button to save details.
- 3) Cancel Tab: To Cancel the details.

## Policy General Tab

- 1) Expand button for all Tab
- 2) Edit Button: To edit all the data from the column
- 3) General Question Tab: Individual Expand button for General Question detail
- 4) Insurance History Tab: Individual Expand button for Insurance History detail
- 5) Schemes Tab: Individual Expand button for Scheme detail

- Individual need to select from System Endorsement drop down & need to click on Add button. And selected value will appear as shown in screenshot.

## Policy Navigation Tab

- Individual need to select from drop down of 'Where is the boat Moored?' and accordingly all the below information will be shown along with navigation.

sel
Underwriting
General
Endorsements
Navigation
AddOnCoverage
Account
Timeline

Where is the boat Registered?\*
Belgium
Registration No
Where is the boat Moored?\*
Admiral Marina
Mooring Type\*
Marina Pontoon
Country
Namibia
Location
Croatia
Location Type
Coastal
Coordinates
null , null
Zone
Irish Zone
Loading (%)
0.00
Approval Required
NO
Notes
N/A

Map
Satellite
Terracina
Formia
Gaeta
Caserta
Benevento
Pompeii
Salerno
Sorrento
Amalfi
Naples
Ponza
Google
Map data ©2020 Google
Terms of Use

Navigation Limits
Cruising Range\*
Coastal water of Spain Including Gibraltar (Excluding North Africa)
Additional Cruising Range
Additional Information here

< Bak to PolicyList
Save
Cancel

## Add-on Coverage

Vessel
Underwriting
General
Endorsements
Navigation
AddOnCoverage
Account
Timeline

Add On Coverage Already Purchased

Policy Option	Premium	Admin Fees	Total	Action
---------------	---------	------------	-------	--------

Add On Coverage Available to Purchase

Policy Option	Premium	Admin Fees	Total	Add to my Policy
---------------	---------	------------	-------	------------------

## Policy Account Tab

- 1) Journal Entry
- 2) Bank Details
- 3) Make Payment
- 4) Edit for Journal Entry / Make Payment
- 5) Delete for Journal Entry / Make Payment
- 6) Receipt of Payment
- 7) View Receipt of Payment

Vessel	Underwriting	General	Endorsements	Navigation	AddOnCoverage	Account	Timeline
--------	--------------	---------	--------------	------------	---------------	---------	----------

1 Journal Entry		2 Bank Details		Payment Due : € 1,080		3 Make Payment	
-----------------	--	----------------	--	-----------------------	--	----------------	--

Seq Num	Transaction Date	TransactionID	Description	Amount Charged	Payment Amount	Payment Mode(STATUS)	Added By	Updated by	Balance	Action
2	04/03/2020	11	New Business	€0	€120	Cheque (Success)			€1,080	4 5 6 7
1	04/03/2020	10	First entry	€1,200	€0				€1,200	

1 to 2 out of 2 records

## Journal Entry

- 1) Payment Entry for Debit/Credit amount.
- 2) Save the details after filling up the data.

\*In description dialogue box, any individual can write about the payment related description.\*If Charge Amount is 10 & charge fees is 2 then the total amount will be automatically calculated & displayed

Yachtsman Dashboard V1.0.4.2020.03.02.14.30.00

Policy 34440

Policy Holder Bhoomi Trivedi

Policy Type Vessel

Summary

Warnings / Messages / Reminder

Vessel Underwriting General

Journal Entry

Journal Entry

Policy 34440 Policy Type Vessel

Policy Holder Bhoomi Trivedi

Transaction Date\* 04/03/2020

Transaction Type ☒ Debit (Charge) ☐ Credit

Reference (Transaction) ID

Description\*

Charge Amount\* 0

Charge Fee 0

Total Charge Amount 0

Note

Save Cancel

\*If Charge Amount is 10 & charge fees is 2 then the total amount will be automatically calculated & displayed

## Bank Details:

Fill up the details as mentioned below:

- 1) Account Name of Policy holder
- 2) Bank Name of Policy holder
- 3) Country of Bank
- 4) IBAN number of Bank
- 5) BIC number

**Enter Bank Details**

Enter Bank Information

Account Name\* 1

Bank Name\* 2

Country\* 3

IBAN\* 4

BIC\* 5

## Make Payment

- 1) Description: Input few descriptions for payment
- 2) Payment Amount: Input the amount you wish to pay
- 3) Payment Mode: Select payment Mode from drop-down
- 4) Note: Payment related note

**Payment Entry**

Policy: 34440 Policy Type: Vessel

Policy Holder: Bhoomi Trivedi

Transaction Date\*: 04/03/2020

Transaction Type: ☒ Payment

Transaction ID:

Description\*: 1 New Business

Payment Amount\*: 2 1200

Payment Mode\*: 3 Select payment mode

Note: 4

Payment Due : € 1200

Balance after payment : € 0.00

☒ Save ☐ Cancel

- Back to Policy List: by clicking on back to policy, it will redirect to policy list.
- Save: by clicking save, all the data will be saved.
- Cancel: Individual will be redirected to Dashboard.

## Payment Receipt

It will be generated as mentioned below:



**James Horton**  
1522 Jinela Dr  
Aghlem Dublin D02 AF30

Date: 04-03-2020

## Receipt of Payment

This receipt is issued in pursuance of Section 30 of the Investment Intermediaries Act 1995. The acceptance of a completed insurance proposal by us does not of itself constitute the effecting of a policy of insurance

<b>Policy Type:</b>	Extra 10.1 to 15m
<b>Insurance Company:</b>	Lloyd's Insurance
<b>Policy No:</b>	34460
<b>Transaction Date:</b>	04-03-2020
<b>Payment Mode:</b>	Cash
<b>Purpose of Payment:</b>	New Business

**Amount Received:** € 6.07  
**Balance Outstanding:** € 0.00



Address: Abbey Mount House, Abbey Street, Nias, Co. Kildare.

Telephone: 045 902668 Fax: 045 902983.

M J O'Neill (Insurance) Ltd t/a Yachtsman Euromarine, Yachtsman Marine Insurance,

Yachtsman Seguros de Barcos is regulated by the Central Bank of Ireland.

Company Reg. No. 48019 Matthew McGarry (Managing Director) Liam McGarry (Director)

Coverholder at **LLOYD'S**



## Policy Binding / New Claim / New Policy Creation

- 1) Recompute Premium
- 2) Bind Policy
- 3) New Claim
- 4) New Policy

[Home](#) / [Policy](#)

1 Recompute Premium
2 Bind Policy
3 New Claim
4 New Policy
☰

\*Policy is Referred as Vessel Length is more than 15m

Policy	34440	Canoe & Kayak	<span style="background-color: #007bff; color: white; padding: 2px 5px;">Quotation</span> <span style="background-color: #dc3545; color: white; padding: 2px 5px;">UNPAID</span> <span style="background-color: #ffc107; color: black; padding: 2px 5px;">Referred</span>	Refer <input checked="" type="checkbox"/>	Policies	2	Claims	0
Policy Holder	Bhoomi Trivedi	Email	bhoomi.cognisun@gmail.com	Phone	+34 123123	Country	Ireland	
Policy Type	Vessel	Language	English	Currency	EUR			

Summary
▼


Warnings / Messages / Reminders
▼

- 1) Recompute Premium: If any changes will be made in Vessel Tab, Underwriting Tab & General tab, then re-computation is necessary.
- 2) If all the details which has been filled are correct then Individual can bind the policy.
- 3) New Claim: for new claim.
- 4) New Policy: If any individual wants to create new policy for current policy holder.

## Drawer Menu System

- Click on Document Option and Drawer menu System will bring you to the Document window.

Dashboard V0.9.2.2020.02.21.22.30.00  
env: DEV


Welcome Hilmar 

Home / Policy



Recompute Premium Bind Policy New Cl

\*Policy is Referred as Vessel Length is more than 15m

Click on Documents option from the Drawer menu

Policy 48277 Canoe & Kayak  Quotation UNPAID Referred Phone +353 45 234 2 3243 Policies

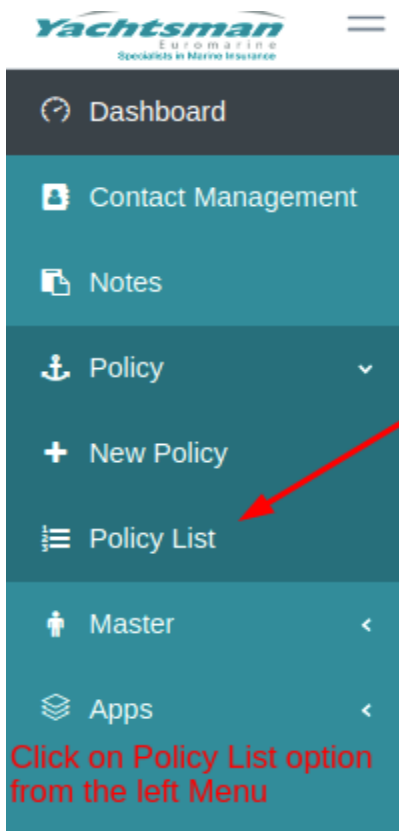
Policy Holder Pritesh Joshi Email testddfsd@gmail.com Country

Policy Type Vessel  Language English  Refer ☒ Currency

- Contact Details
- Claims
- Documents
- Notes
- Tasks
- History



### 3. POLICY LIST



- In the Policy List screen, we can see list of existing Policies and create or update the existing screens.
- Here we can also sort the Policies on each column.
- We can also export the Policy List data into the CSV.

### 3.1

### POLICY LIST SCREEN

In the Policy List screen, we can see the list of existing policies and can create, update new policies

Dashboard V0.9.1.2020.02.21.18.10.00  
env: QA

Home / Policy

Welcome Hilmar











**Policy List**

Search Policy

Sorting on Columns

In the Policy List screen we can see list of existing Policies, and create and Update the new Policies.

Create new Policy

Action	Policy No/Type	Client/Contacts	Vessel	Insurer	Sum Insured/Premium	Inception/Renewal	Department	Status
Edit Policy			Class/Type					
 	Vessel 48258	Sagar Kamadia +3 539 8 4563 sagar.cognisun@gr	Fast Fisher Fast Fisher	Lloyd's Insurance	7000 677.01	20-02-2020	Direct	Quotation
 	Vessel 48257	Sagar Kamadia +3 539 8 4563 sagar.cognisun@gr	Sports Boat Sportsboat	Lloyd's Insurance	10300 2387.6	22-02-2020	Direct	Pending
 	Vessel 48256	Sagar Kamadia +3 539 8 4563 sagar.cognisun@gr	Sports Boat Sportsboat		10600 809.83	20-02-2020	Direct	Active
 	Vessel 48255	Sagar Kamadia +3 539 8 4563 sagar.cognisun@gr	Sports Boat Sportsboat	Lloyd's Insurance	200000 40050.1	20-02-2020	Direct	Quotation
 	Vessel 48254	Sagar Kamadia +3 539 8 4563 sagar.cognisun@gr	Day Boats Day Boat	Lloyd's Insurance	5000 2125	19-02-2020	Direct	Quotation
		Sagar Kamadia						

1 to 10 out of 120 records

## 3.2

## CREATE NEW POLICY

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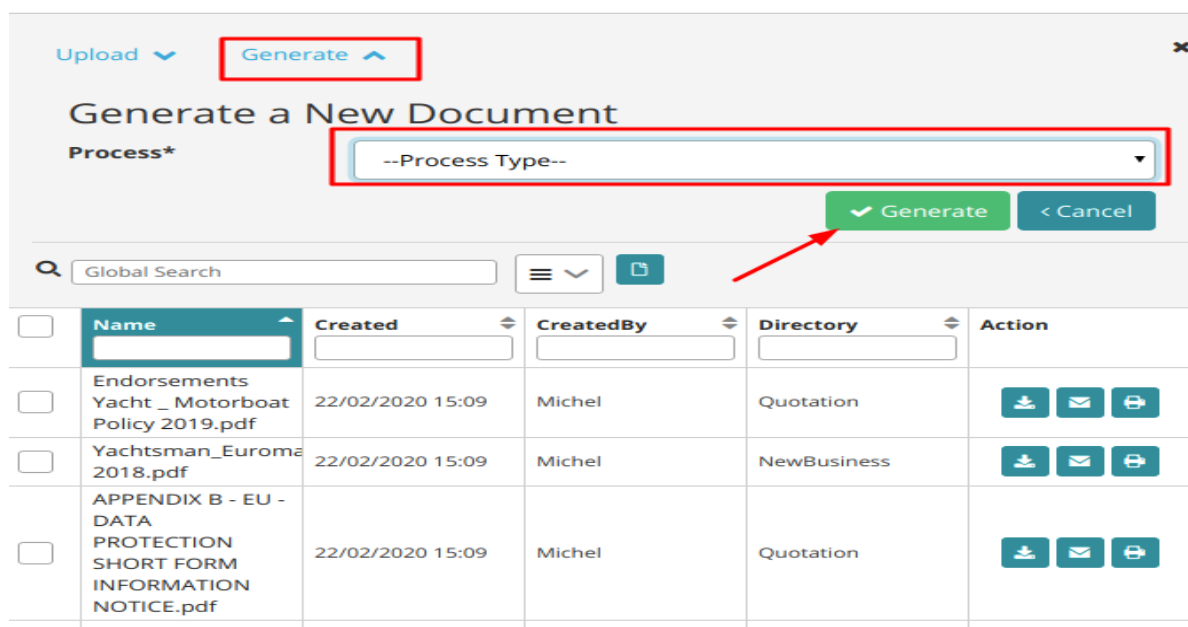
New/Create Policy Setup: Go to the Policy List page under Policy Menu.



Once you click on + button on top right corner of the Policy list screen System will bring you to the New Policy section

## 4. DOCUMENT MANAGEMENT

### 4.1 GENERATE A NEW DOCUMENT



Upload

### Generate a New Document

Process\*

Global Search

	Name	Created	CreatedBy	Directory	Action
<input type="checkbox"/>	Endorsements Yacht _ Motorboat Policy 2019.pdf	22/02/2020 15:09	Michel	Quotation	<input type="button" value="Download"/> <input type="button" value="Email"/> <input type="button" value="Print"/>
<input type="checkbox"/>	Yachtsman_Euromarine 2018.pdf	22/02/2020 15:09	Michel	NewBusiness	<input type="button" value="Download"/> <input type="button" value="Email"/> <input type="button" value="Print"/>
<input type="checkbox"/>	APPENDIX B - EU - DATA PROTECTION SHORT FORM INFORMATION NOTICE.pdf	22/02/2020 15:09	Michel	Quotation	<input type="button" value="Download"/> <input type="button" value="Email"/> <input type="button" value="Print"/>

As per above mentioned screenshot, click on Generate Dropdown & you can see different types of options i.e.: (quotation, New business, Renewal Notice, Confirmation of Renewal, Midterm adjustment, Boat safety check) to generate the different kind of documents. Once you generate the documents you can download from the generated list.

## 4.2

## UPLOAD DOCUMENT

### Upload Document:

Custom Document can be uploaded as per the above-mentioned screenshot.

Dashboard V0.9.2 2020.02.21.22.30.00 env: DEV Welcome Hilmar

Home / Policy

\*Policy is Referred as Vessel Length is more than 15m

Policy 48277 Canoe & Kayak Quotation

Policy Holder Pritesh Joshi

Policy Type Vessel

Summary

All values are in EUR.

Total Sum Insured	52000
Rate	0 %
Starting Premium	0
Adjustments	18200

Upload a New Document

Upload Generate

Select File\* Choose file No file chosen

File Name\* File Name

Directory\* --Document Type--

Description Description

Upload Cancel

Global Search

Name	Created	CreatedBy	Directory	Action
Endorsements Yacht_Motorboat Policy 2019.pdf	22/02/2020 15:09	Michel	Quotation	Download Edit Delete

### Notes:

Notes can be added by clicking on Menu Drawer.

Home / Policy

Policy 34460 Extra 10.1 to 15m Pending UNPAID Refer Policies 9 Claims

Policy Holder James Horton Email manishstar@gmail.com Phone +353 45 125 3 1254 Country

Policy Type Vessel Language English Currency

Summary

Warnings / Messages / Reminders

Vessel Underwriting General Endorsements Navigation AddOnCoverage Account Timeline

Vessel

Engine and Trailer Details

Tender/Auxiliary Vessel

Sum Insured

Notes



## Add Notes:

- Select Note Type from the drop-down & click on Exclamatory icon to check whether it's referred or not.
- Enter Note description & click on Save button.

The screenshot shows the 'Add Notes' dialog box on the right, which is open over a policy details page on the left. The dialog box has a 'Notes Type\*' dropdown menu with an information icon (i) next to it. Below the dropdown is a text input field labeled 'Notes\*' with the placeholder 'Enter Note'. At the bottom right of the dialog are 'Save' and 'Cancel' buttons. Below the dialog, a list of '2 notes' is displayed. The first note is a 'Policy' note with the text 'test', added by Hilmar Sigurgeirsson on 04/03/2020 at 17:25. The second note is a 'Refer' note with the text 'Policy is Referred as Vessel Length is more than 15m', added by Hilmar Sigurgeirsson on 01/03/2020 at 06:48, and updated by Hilmar Sigurgeirsson on 04/03/2020 at 16:18. The background page shows policy details for policy 34460, including the policy holder James Horton and the vessel type Vessel.

The note dialogue box will be generated automatically, if the data would not be relevant to the rules & regulations/policy as mentioned below screenshot.

This screenshot shows the 'Add Notes' dialog box and a list of notes, similar to the previous one, but with an additional warning message. The warning message, located at the top of the policy details page, states: '\*Policy is Referred as Vessel Length is more than 15m'. The 'Add Notes' dialog box is the same as in the previous screenshot. The list of notes now shows '3 notes'. The first note is a 'System' note with the text 'Mooring information was updated for this policy.', added by Hilmar Sigurgeirsson on 04/03/2020 at 17:34. The second note is a 'Policy' note with the text 'test', added by Hilmar Sigurgeirsson on 04/03/2020 at 17:25. The third note is a 'Refer' note with the text 'Policy is Referred as Vessel Length is more than 15m', added by Hilmar Sigurgeirsson on 01/03/2020 at 06:48, and updated by Hilmar Sigurgeirsson on 04/03/2020 at 16:18. The background page shows the same policy details as before.

-----THANK YOU-----