Julian Harris Intranet - User Manual

Contents

1. Accessing the Intranet

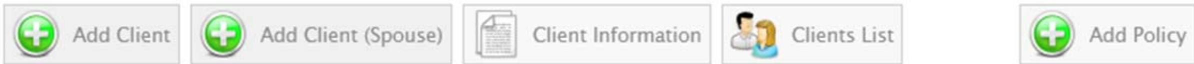
The Intranet website can be accessed via:

http://intranet.julianharris.net

Once there you login using your email address and password, if you haven't set up a password, ask your manager to assign one, this can be changed by you when you login.

2. Adding a New Client

To add a new client, select the ***Client*** tab and then select ***Add Client*** from the link bar. Once completed select ***Save***, you will then be presented with a summary of the information entered and buttons at the bottom of the page.



Add Client

This allows you to add another client as done previously.

Add Client (Spouse)

When adding a spouse it is quicker to select the Add Client (Spouse) button as the form will be pre-filled with the Title, Surname, Address and Home Phone Number of the client previously saved.

Client Information

By selecting Client Information you'll be taken to the Client page, allowing you to add a policy or change the information entered for the client.

Client List

The client list is a list of all clients.

Add Policy

Allows you to add a policy for the client.

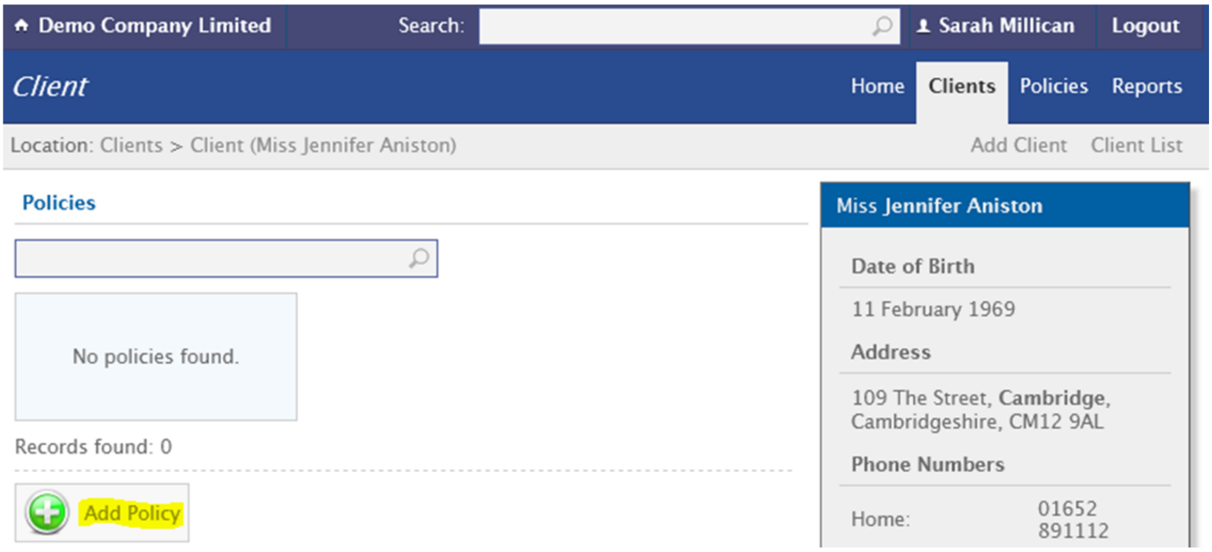
3. Adding a Policy

There are a number of ways of adding a new policy.

Adding a Client

When you've added a new client (as described in section 2) you have an option to ***Add Policy***, this will then create a new policy with the client already assigned.

Client Information

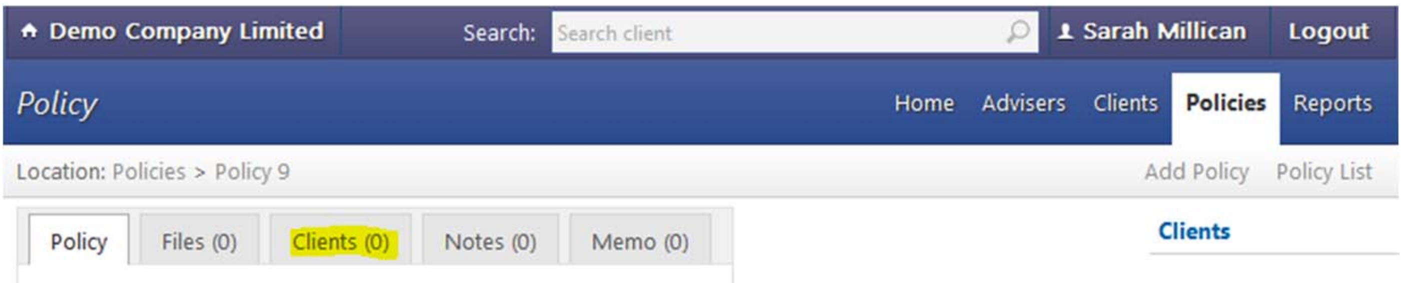


When viewing a client's information, under the list of policies, you can select ***Add Policy***, this will then create a new policy with the client already assigned.

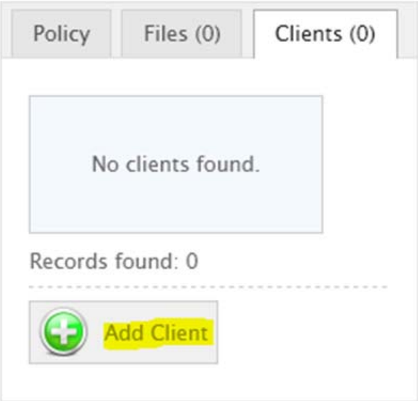
Add Policy

To add a new policy, select the ***Policies*** tab and then select ***Add Policy*** from the link bar.

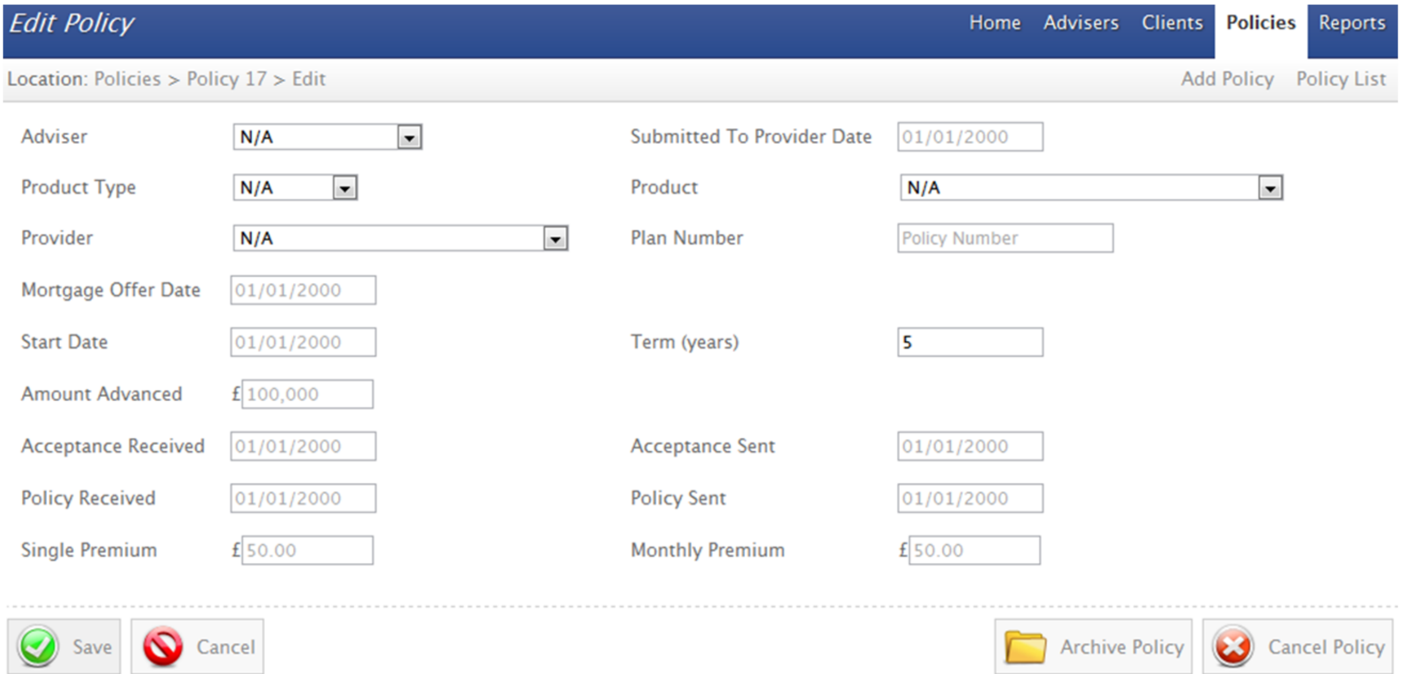
When adding a policy using this method, you are creating a policy without the client information. Once the policy is created you will then need to add client(s) to the policy.



Select the ***Clients*** tab, then ***Add Client***.

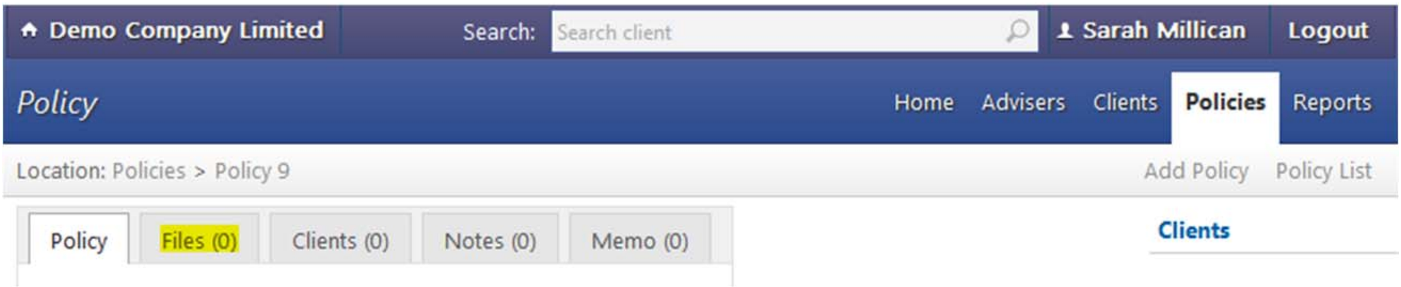

Policy
Files (0)
Clients (0)
No clients found.
Records found: 0
Add Client

4. Policy Data Entry

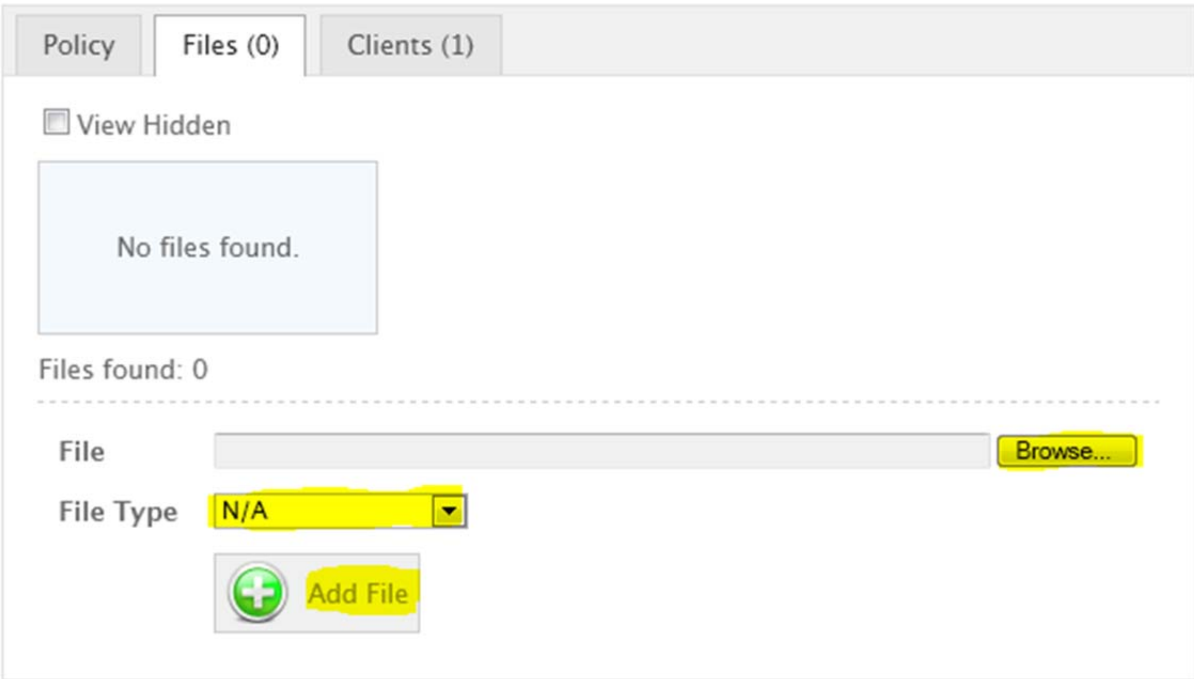


If the provider isn't shown on the Provider list, please email Donna, and the list will be updated.

5. Adding Files to the Policy



To add files to a policy, select the ***Files*** tab.



Browse for the file you wish to upload, select the ***File Type*** and then ***Add File***.

Multiple File Upload

If your browser supports multiple files, you can select multiple files using either the *Shift* or *Alt* button on your keyboard once you've clicked the browse button. After clicking the ***Add File*** button you will be presented with a list of files uploaded, which you'll be able to choose the file type for.

Converting documents to Adobe PDF format

There are two ways to convert your documents to Adobe PDF.

1. If you are using Microsoft Office 2010 you can choose the type ***PDF (*.pdf)*** when you click ***Save As***. For Microsoft Office 2007 you can download an Add-in which gives you the same function.

2. PrimoPDF is a free PDF print driver. Once you have installed it, you will then be able to ***Print*** in any program and select the ***PrimoPDF printer***. Once chosen you'll then be provided with an option to save the file.

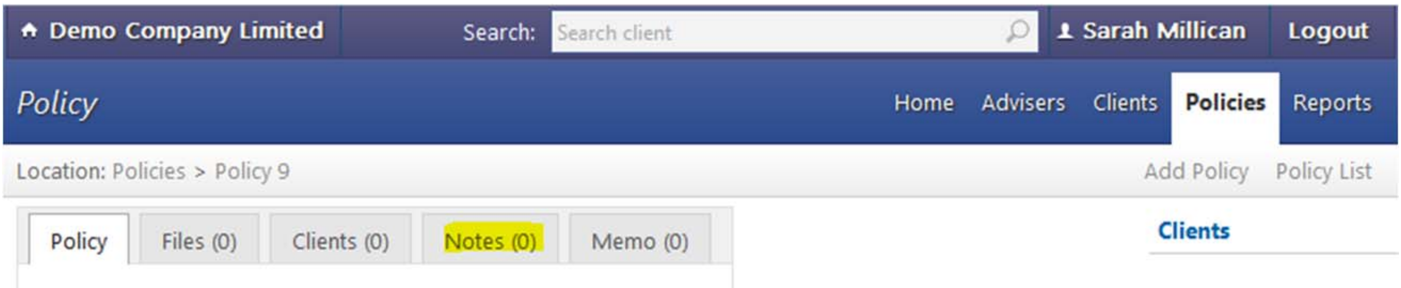
6. Removing Files from the Policy

	Type	Name	Size	Date Added		
PDF	Com	Trigold.pdf	13	27/09/2011 13:14		

To remove a file from the policy, click the ***Edit Button***.

On the Edit File page, click the ***Hidden*** checkbox and then ***Save***. This will remove the file from the policy.

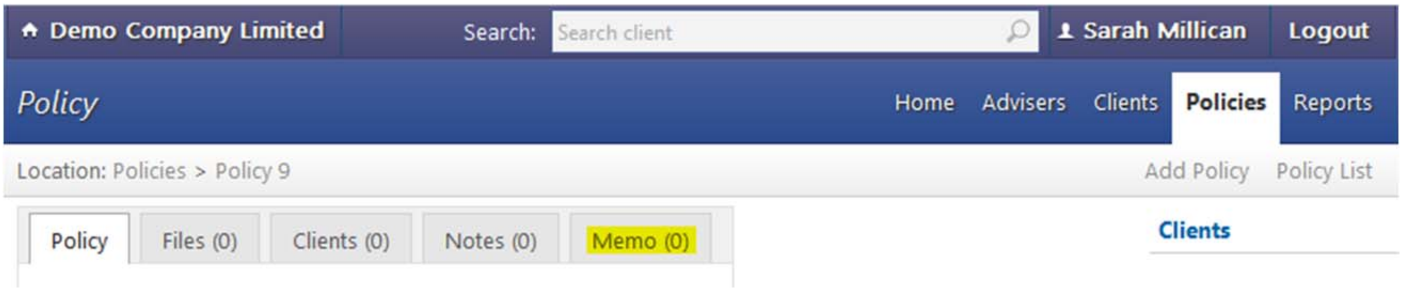
7. Adding Notes to the Policy



To add note to the policy, select the ***Notes*** tab.

Type the note and then click ***Add Note***.

8. Sending a Memo about the Policy



To send a memo, select the ***Memos*** tab.

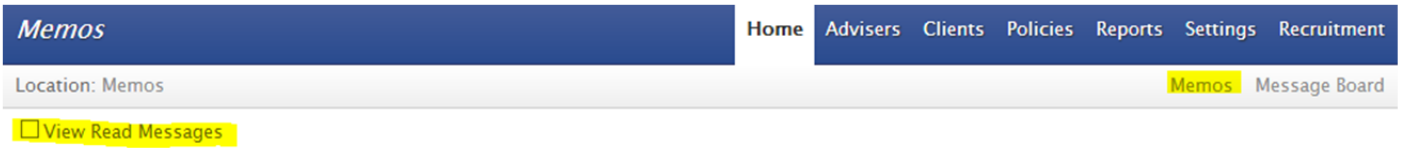
Select the person who you wish to send the memo to, type the memo and then click ***Send Memo***.

9. Receiving Memos

When a memo has been sent to you, your name will be replaced at the top of the screen with the number of memos waiting.

Click the “Memo found” message to be presented with a list of policies with memos unread.

Read Memos



To review previously read messages, click the ***Memos*** link and then select ***View Read Messages***.

10. Policy Status

Each policy starts with a status of Incomplete ( ).

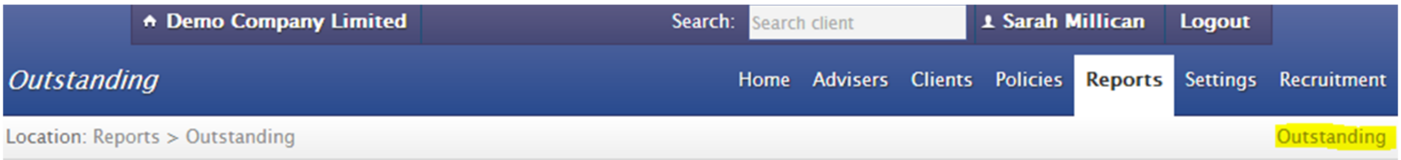
For the policy to progress to a status of Compliance ( ), the required data needs to be inputted and files uploaded. A list of required data and files will be shown in the To Do List shown when viewing a policy.

Once a policy status is at Compliance ( ), some data and files may still be required, this again will be shown in the To Do List. Once the policy has been checked by Compliance Officer and all data and files received the policy will change to Completed ( ).

If you are entering a policy that doesn't require compliance checking, for instance an agency switch, where you would like to use the system for reconciling your renewal commission, you can mark the policy as Archive ( ). To do this you need to click the ***Archive Policy*** button on the ***Edit Policy*** page.

To cancel a policy, click the ***Cancel Policy*** button on the ***Edit Policy*** page. This will then change the status of the policy to Cancelled ( ).

11. Policies with work outstanding



To review a list of policies that are requiring files or further information, select the ***Reports*** tab and then the ***Outstanding*** link.

2556 21/05/2012		Ms Angelina **Jolie** Mr Brad **Pitt**	Details: Clients Product Type Product Provider Application Date Premium Term	Details: Plan Number Start Date Acceptance Received Date Acceptance Sent Date Policy Received Date Policy Sent Date		
2554 21/05/2012	Further Advance	Ms Angelina **Jolie** Mr Brad **Pitt**	Details: Application Date Premium Term Amount Advanced Rate Rate Type Files: Factfind / Addendum Terms of Business / IDD Comparisons / Research KFI – Interest/Repayment/Part & Part Application Form Proof of Income Interest Only Declaration Suitability Report / Demands & Needs	Details: Plan Number Mortgage Completion Date Files: Customer Satisfaction Questionaire Mortgage Offer		