



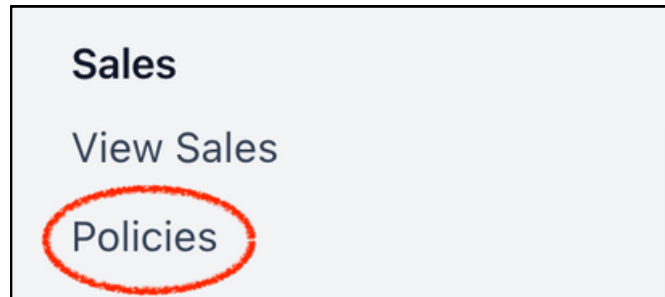
# HOW TO: View your client policies

SMART. SIMPLE. SAFE.



# See status on all policies

Click on "Policies" on the left hand navigation ...



...to show the status of all your sold policies

My Policies							Download Spreadsheet
<input type="text" value="Search by policy or ID no."/>		Filter by Status <span>▼</span>					
Policy no.	Policy Owner	Status	Inactive Date	Missed premium?	Off cover?	Last payment	
NIKROA240812LCX	Niko Roa Test 8206115333085	Active	---	No	No	(new contract)	
NIKPAT200624NUO	Niko Patrikios 8206115333085	Active	---	No	No	(new contract)	
MARJON211123QRZ			---	No	No	(new contract)	
EMIHAI230921DJS			---	No	No	(new contract)	
NIKPAT200727DVF	Niko Patrikios 8206115333085	Active	---	No	No	(new contract)	

# Detail on each policy

Click on the “Actions” button next to the policy, for detail

View correspondence

Request debicheck mandate

Policy document

Self service

Upsell

Debicheck status:  
Other (2024-11-01 at 15:08)

## Self Service allows you to see all the details of each policy

Contract

Policy Summary

Payment Details

Benefits

Debit Orders

Salary Deductions

Changes

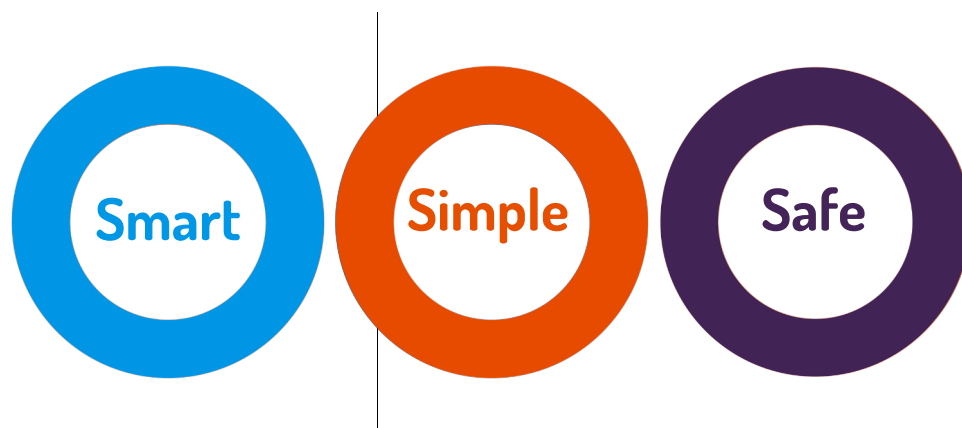
Tickets

Collection Actions

ACTIVE

Refresh

Notes



Contact your  
Broker Consultant  
for assistance.



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