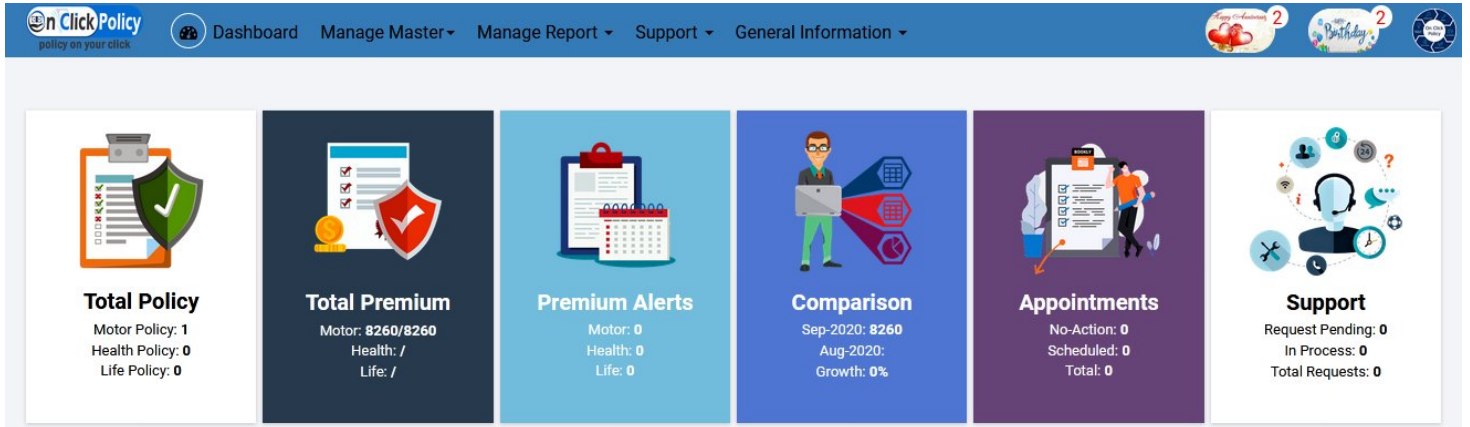


How to use On Click Policy-User Portal

First Register Your Self: <https://www.onclickpolicy.com>

1. You will get an Email with Your Initial Password.
2. Login and Complete Your KYC.
3. After KYC Completion you will allow for 3 Day Trial Period or Payment may be done if you already know the Procedure.
4. Update your all Details in Profile Setting.
5. After Completing all Details your account is ready to Use.



Manage Master-

1. Manage User-
Create User (User Role-Channel Partner/Business Partner)
 1. Channel Partner the Person who is doing business with you and Business Partner the Person with whom you are doing business whether Insurance Company (Agency Code Details) or Broker
 2. Alias Name is the name that will reflect in your Sheet (use of alias to avoid data confliction for same name persons)
 3. State Code is Mandatory for Purpose of GST invoice or Payout Invoice
 4. TDS % is subject to User who had their TAN No. and Paying Commission by TDS Deduction to Channel Partner.
 5. Please fill all required columns according to your Business Use.

Policy Inwarding-

1. Search Customer if already created by you or Fill Customer Details and Proceed to Next.
2. On Policy Inwarding Page fill Complete Policy details, Like Policy Type, Vehicle/Plan Type.
3. Installment Tenure is the Duration of Policy or Premium Deposit Tenure depends on Installment Prefixed by Insurance Company against Policy. It will help you in Renewal or Premium Due alert.
4. Payment Mode will be pending where premium paid by Client in cash or short amount (same will be handled by MIS Payment Report in proper accounting)
5. Agent Commission Details-Commission you pay to Agent or Cash back to Customer in Case direct sourcing.
6. Insurer Commission Details-Commission you earn from your Business Partner with your mutual consent.

Agent/Insurer MIS Report-

1. Agent/Insurer wise Report on search basis. Export on Search Basis and Compete MIS Report Export.

Cheque Report-

1. Cheque Report Represents the report where payment mode is Cheque and not clear.

Pending MIS Report-

1. Pending MIS Report Represents the cases where Premium Recd amount is less than Gross Premium.

MIS Payment Report-

1. Add your Bank Account/Credit Cards according to your payment Modes to manage Account Properly.
2. TAG your payment according to policy, Only Pending policy will reflect.
3. In case of Commission Paid and Commission Recd Please Select Period.
4. To Generate GST Invoice IGST or CGST/SGST will require to add GST in Invoice.
5. While Edit a Bank TXN it is necessary to Copy your available balance of that Transaction to avoid unnecessary mismatch of Bank Ledger.

Renewal MIS Report-

1. Renewal MIS Report will show the Renewals within 7 Days before expire and after expire.
2. Renewal will depend on the installment basis.
3. You will have the option of Manual status of Renewal Follow Up/Matured/Case lost etc.
4. This will help you to mature your maximum lead.
5. Renewal Premium will be defined by Insurer; we will show the Expiry of Policy and LY Premium.

Technical Support-

1. If you have any Query or Technical Issue with Portal you may raise your Ticket.
2. Policy – We provide you option for Hard Copy Dispatch to your Clients (Courier Charge/Printing Charges will taken from Partner).
3. We are availing Endorsement as well where Service Charges will be charged other than Endorsement Charges where you are facing in Endorsement for other branches or Insurer.
4. Claim & Financial Services will avail soon on our Portal as we are looking for a dedicated team for that.

Fix Appointment

1. You can fix appointment with your partners' clients and any other.
2. Appointment will reflect in your dashboard for the day.

General Information

1. In General Information you will have the option to Search PIN Code RTO Code/Bank IFSC Code.

**Important Information: If you have any other Query Regarding the usage of Portal,
Please feel free to call us at +91 93509 96509 or drop a mail us at
support@onclickpolicy.com**