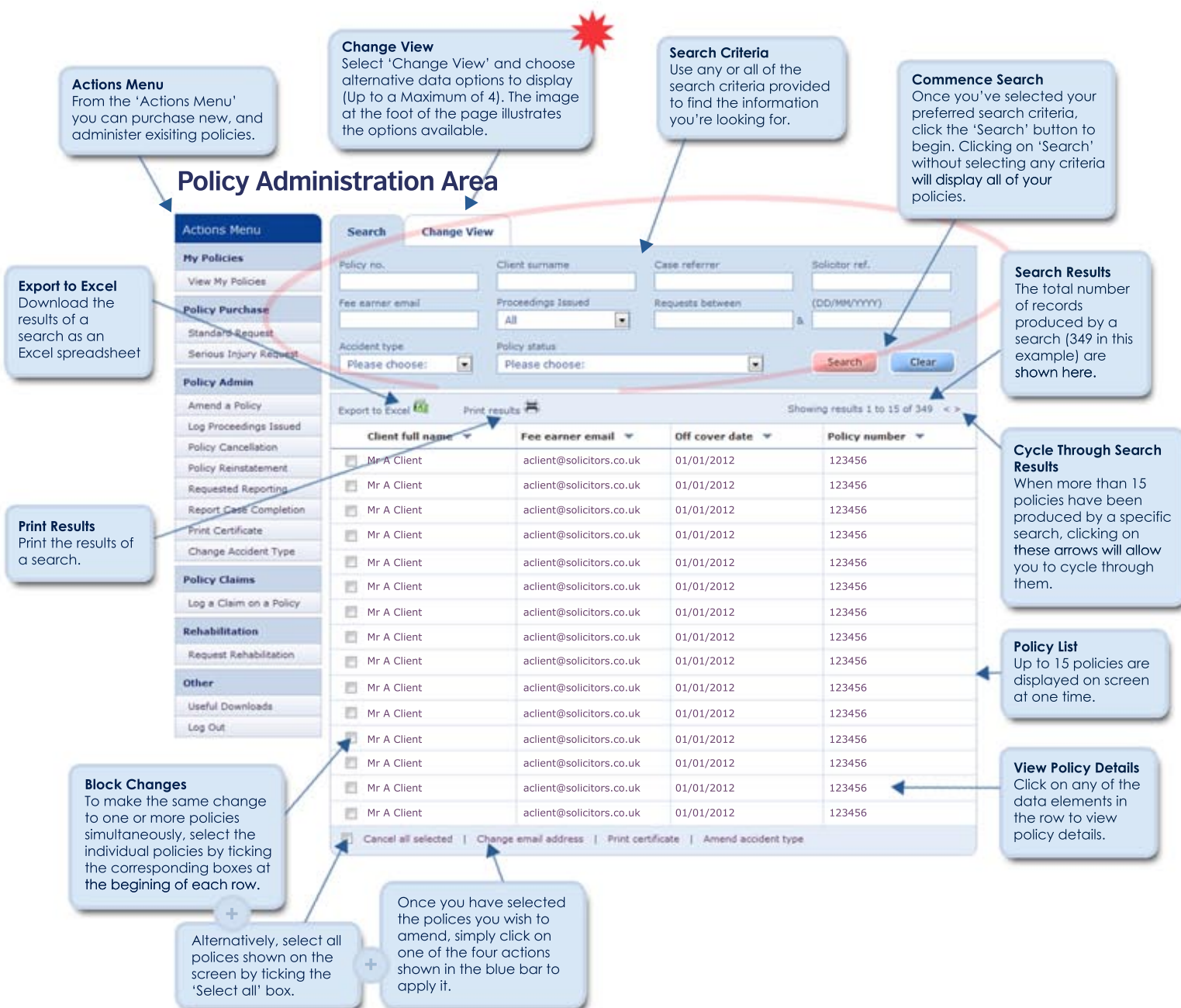


Policy Administration: Quick Guide



It's important to us that all of our clients are able to use our website as easily and efficiently as possible. This Quick guide is designed to introduce you to our improved 'Policy Administration Area' and to help you find your way around it. This is the place where you can buy new and administer existing ATE policies. If you have questions about anything we haven't covered here; don't hesitate to get in touch. We're here to help.



Actions Menu
From the 'Actions Menu' you can purchase new, and administer existing policies.

Change View
Select 'Change View' and choose alternative data options to display (Up to a Maximum of 4). The image at the foot of the page illustrates the options available.

Search Criteria
Use any or all of the search criteria provided to find the information you're looking for.

Commence Search
Once you've selected your preferred search criteria, click the 'Search' button to begin. Clicking on 'Search' without selecting any criteria will display all of your policies.

Search Results
The total number of records produced by a search (349 in this example) are shown here.

Cycle Through Search Results
When more than 15 policies have been produced by a specific search, clicking on these arrows will allow you to cycle through them.

Policy List
Up to 15 policies are displayed on screen at one time.

View Policy Details
Click on any of the data elements in the row to view policy details.

Block Changes
To make the same change to one or more policies simultaneously, select the individual policies by ticking the corresponding boxes at the beginning of each row.

Alternatively, select all policies shown on the screen by ticking the 'Select all' box.

Once you have selected the policies you wish to amend, simply click on one of the four actions shown in the blue bar to apply it.

Export to Excel
Download the results of a search as an Excel spreadsheet

Print Results
Print the results of a search.

Policy Administration Area

Search **Change View**

Policy no. Client surname Case referrer Solicitor ref.
Fee earner email Proceedings Issued Requests between (DD/MM/YYYY)
Accident type Policy status
Please choose: Please choose: Search Clear

Export to Excel Print results Showing results 1 to 15 of 349 <>

Client full name	Fee earner email	Off cover date	Policy number
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456

Cancel all selected | Change email address | Print certificate | Amend accident type

Search/Change View Panel

The image to the right shows the 'Change View' panel from the top of the page. Use the two tabs to switch between the 'Search' and 'Change View' panels.

In 'Change View' (seen here), select the data types you'd like to view by ticking the respective boxes alongside each options. Click on the 'Update Columns' bar to update the column headers.

Search **Change View**

<input type="checkbox"/> Accident date	<input type="checkbox"/> Age of policy	<input type="checkbox"/> Cancellation date	<input type="checkbox"/> Cancellation reason	<input type="checkbox"/> Client address
<input type="checkbox"/> Client DOB	<input checked="" type="checkbox"/> Client full name	<input type="checkbox"/> Client postcode	<input type="checkbox"/> Client surname	<input type="checkbox"/> Defendant full name
<input checked="" type="checkbox"/> Fee earner email	<input type="checkbox"/> Insurance status	<input checked="" type="checkbox"/> Off cover date	<input type="checkbox"/> On cover date	<input checked="" type="checkbox"/> Policy number
<input type="checkbox"/> Premium	<input type="checkbox"/> Proceedings issued	<input type="checkbox"/> Referral company	<input type="checkbox"/> Solicitor ref	<input type="checkbox"/> Accident type

Update Columns