

## INSURANCE – RECEIVE DOCUMENTS INTO POLICY AND DISPLAY IN CLIENT ACCOUNTS

### INTRODUCTION

A new feature has been developed which will allow you to receive insurance documents into an insurance policy and also choose to have this saved to all individual properties covered by the policy and therefore into the **Letters Documents** tab of every relevant client. As part of this process the insurance document can be assigned a Web Document Type and can therefore appear on the client web portal.

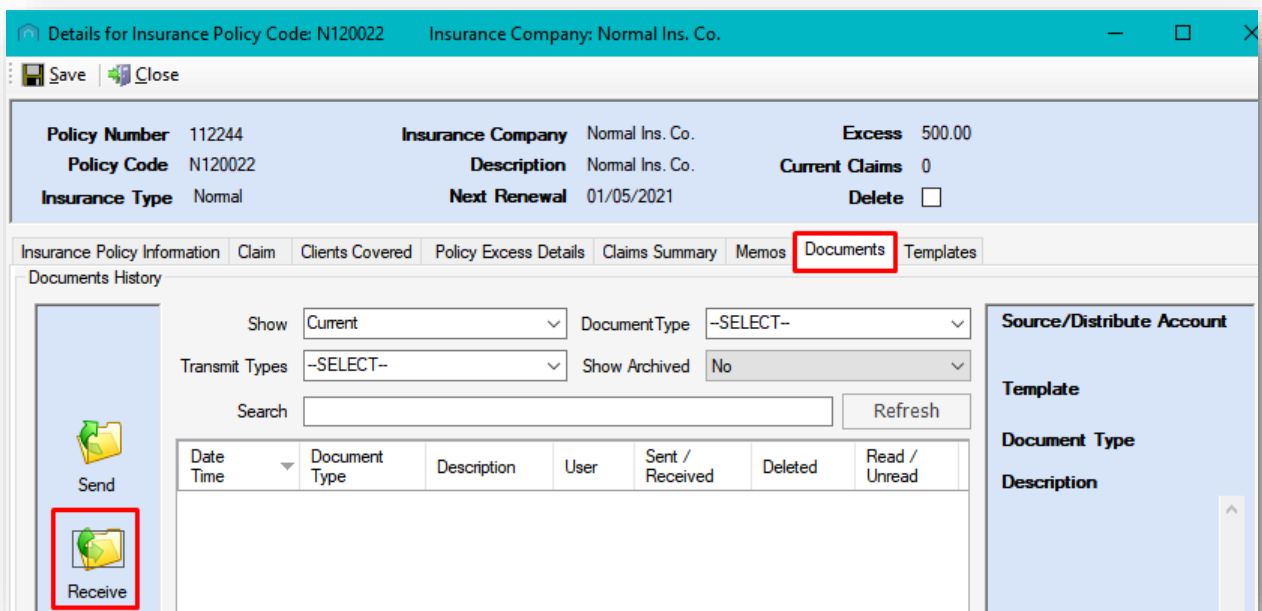
### DOCUMENT TYPE

You will need to have a Document Type already created for insurance to be able to receive a document into your insurance policy area. The **Document Types** feature within CPL allows you to set up categories of documents and to prescribe which CPL areas these will be available from, which areas they will be distributed to and what audience will be able to see them.

Please consult the **Document Types Training Guide** available [here](#) on the Knowledge Base if you would like some help with creating the Document Type.

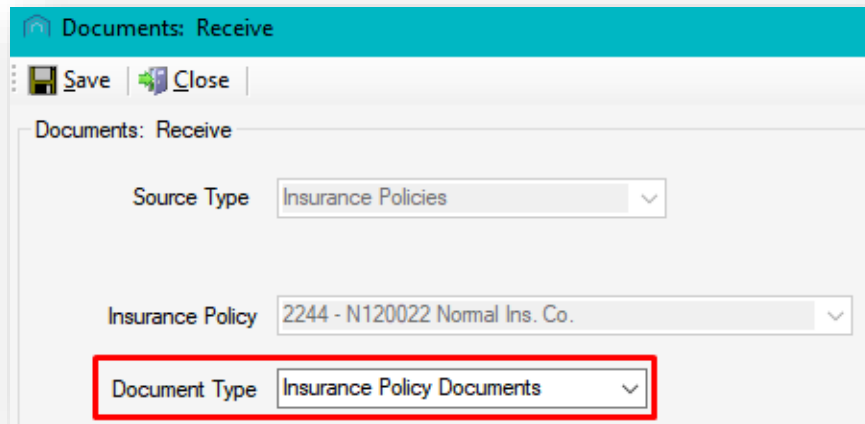
### UPLOADING YOUR INSURANCE DOCUMENT

To upload an insurance document that you wish to share with all clients covered by that policy, open the individual insurance policy, from the main **Insurance** tab, click on the **Documents** tab and then click on the **Receive** option in the action panel on the left of the screen.



The **Source Type** and the **Insurance Policy** fields will already be populated.

Select the appropriate **Document Type** from the field below. If you don't already have a document type created for insurance, the field will not display any options for you to select and you will not be able to save your document. If you already have an appropriate document type created you can select this.



Documents: Receive

Save Close

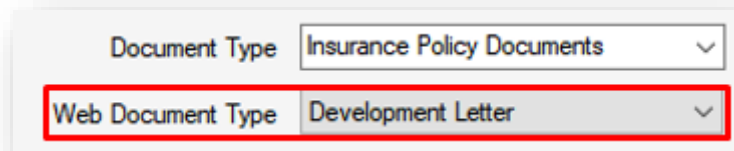
Documents: Receive

Source Type Insurance Policies

Insurance Policy 2244 - N120022 Normal Ins. Co.

Document Type Insurance Policy Documents

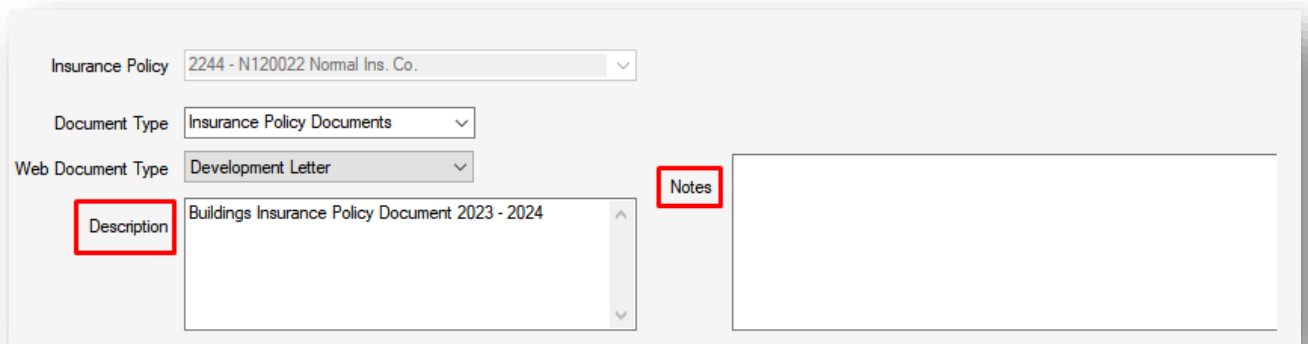
If you would like the insurance document to display on the appropriate Documents tab of your client web portal, you can choose an appropriate **Web Document Type**.



Document Type Insurance Policy Documents

Web Document Type Development Letter

Add a **Description** and you may also add any internal **Notes** if you wish to.



Insurance Policy 2244 - N120022 Normal Ins. Co.

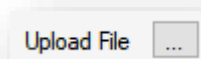
Document Type Insurance Policy Documents

Web Document Type Development Letter

Description Buildings Insurance Policy Document 2023 - 2024

Notes

Click on the **Upload File** button to browse for and upload your insurance document.



Upload File ...

### APPLYING TO ALL POLICY HOLDERS

The key option which will enable you to make the document available to all clients covered by this policy is to tick the **Apply Document to all Policy Holders** option.

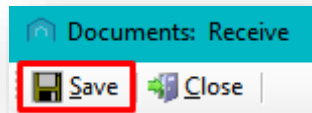
Upload File

Apply Document to all Policy Holders

Audience Type

Print QR Code

Once you have done this, don't forget to click on the **Save** button in the top-left of the screen before closing.



This insurance document will now be available from every client account in the **Letters Documents** tab.

Client Account: 0006001 / Mr D Leonard

Save Close

Account Number	0006001	Float Due	£200.00	Current Balance
Client Name	Mr D Leonard	Float Paid	£200.00	Charge Balance
Property Manager	Karen-Ann	Float O/S	£0.00	Balance Due
Payment Type	Normal	Status	Normal	PW Balance

Activity | Diarised Charges | Web Portal Tracking | Invoice Preview

Account | Addresses Activity | Transaction Activity | Float Transactions | Charge Transaction | Credit Control | Memos | **Letters Documents**

Documents History

Show  Document Type

Transmit Types  Show Archived

Search

Date Time	Document Type	Description	User	Sent / Received	Deleted
03/07/2023 11:29:08	Insurance Policy Documents	Buildings Insurance Policy Document ...	Administrator	Received	<input type="checkbox"/>

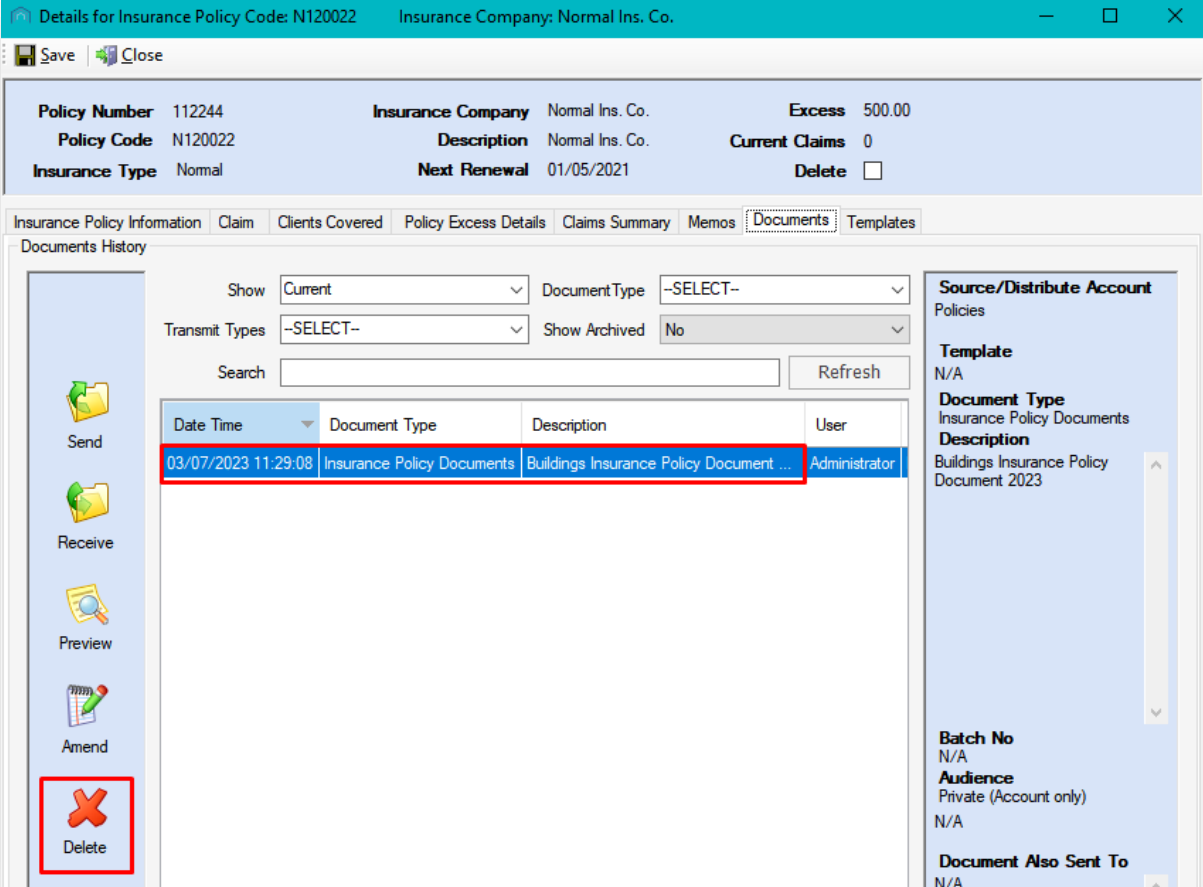
Send

### AVAILABILITY ON CLIENT WEB PORTAL

If you added a web document type, it will also be available for all relevant clients to access from the appropriate **Documents** tab of your client web portal.

*Please note, if you add a new development or new properties within a development subsequent to this process, the new properties will not automatically pick up the insurance document and each new client will not have this listed in the Letters Documents tab of their account or available to them on the Documents tab of the client web portal.*

*In this instance, you could delete the document from the Documents tab in the Insurance Policy and re-upload this. This will pick up all existing clients covered including the clients of the new properties added who are now covered by the policy.*



Details for Insurance Policy Code: N120022 Insurance Company: Normal Ins. Co.

Save Close

<b>Policy Number</b>	112244	<b>Insurance Company</b>	Normal Ins. Co.	<b>Excess</b>	500.00
<b>Policy Code</b>	N120022	<b>Description</b>	Normal Ins. Co.	<b>Current Claims</b>	0
<b>Insurance Type</b>	Normal	<b>Next Renewal</b>	01/05/2021	<b>Delete</b>	<input type="checkbox"/>

Insurance Policy Information Claim Clients Covered Policy Excess Details Claims Summary Memos **Documents** Templates

Documents History

Show: Current Document Type: --SELECT--  
 Transmit Types: --SELECT-- Show Archived: No  
 Search: Refresh

Date Time	Document Type	Description	User
03/07/2023 11:29:08	Insurance Policy Documents	Buildings Insurance Policy Document ...	Administrator

Source/Distribute Account Policies  
 Template: N/A  
 Document Type: Insurance Policy Documents  
 Description: Buildings Insurance Policy Document 2023  
 Batch No: N/A  
 Audience: Private (Account only)  
 Document Also Sent To: N/A

Send  
 Receive  
 Preview  
 Amend  
**Delete**