Swiss Re
Corporate Solutions

PULSE User Guide

Producing Office

General Information

Browser & Device Compatibility

PULSE platform is supported on all major browsers. Other input devices (e.g. iPad) are currently not supported.

Playground Environment can be accessed here

Production Environment can be accessed here

Lines of Business

The following Lines of Business are currently in scope:

- Property
- Casualty
- Directors & Officers
- Engineering & Construction

Roles & Responsibilities

Producing Carrier:

- Creates, navigates, and works on Accounts & Programs. Assigns task to CorSo Network.

Company Admin:

- Manages users, teams and company details

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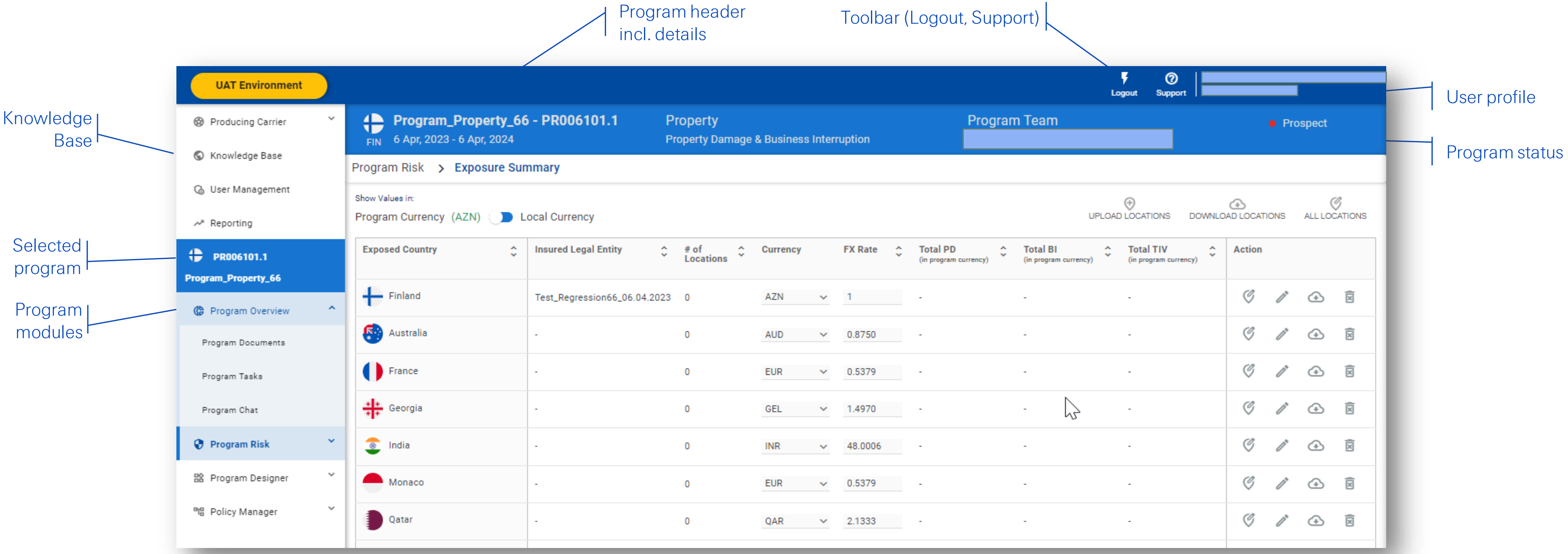
General Navigation

01

General Navigation for Producing User



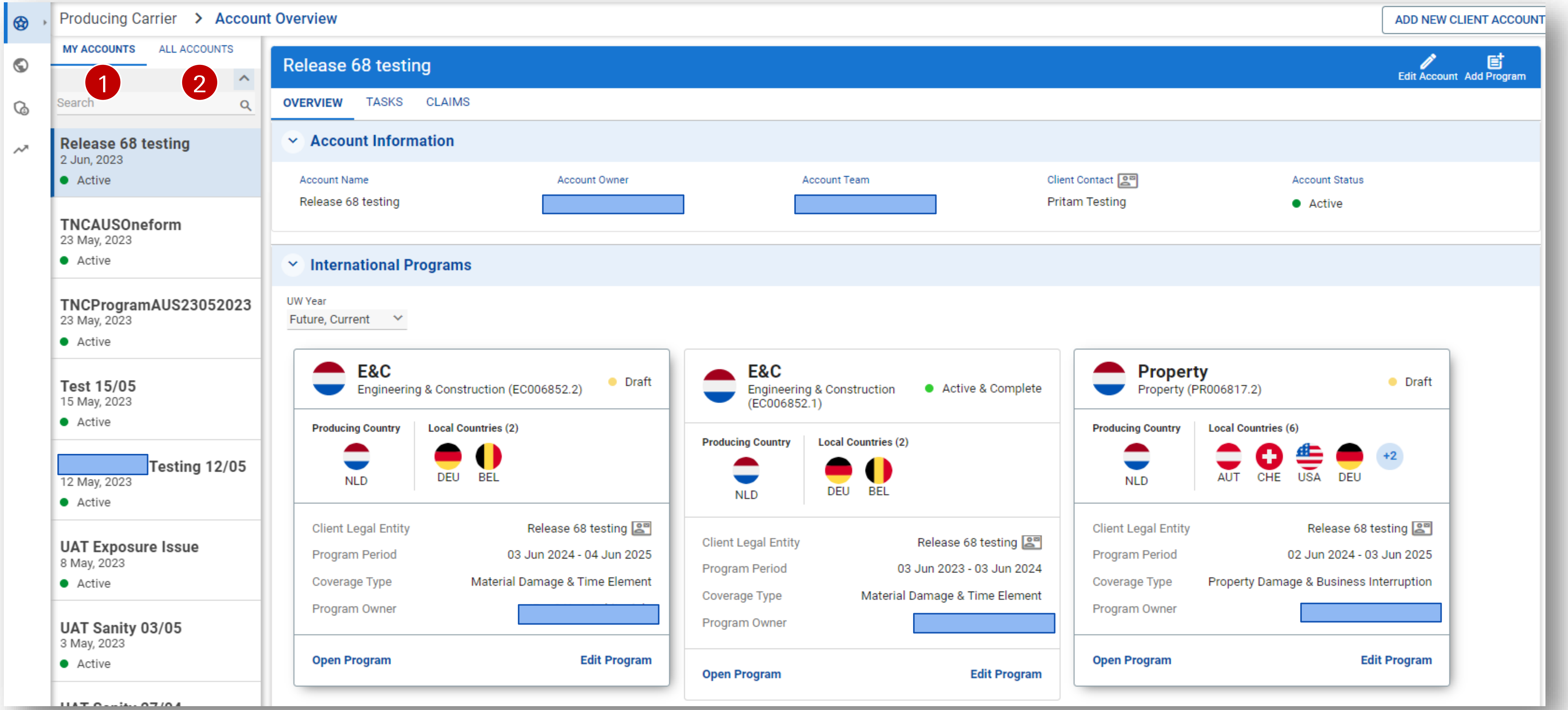
Account & Program

02

Account Overview – My Accounts vs. All Accounts

The account overview offers a holistic perspective on:

1. **My accounts**: the clients accounts assigned to the user
2. **All accounts**: all the clients accounts of the company



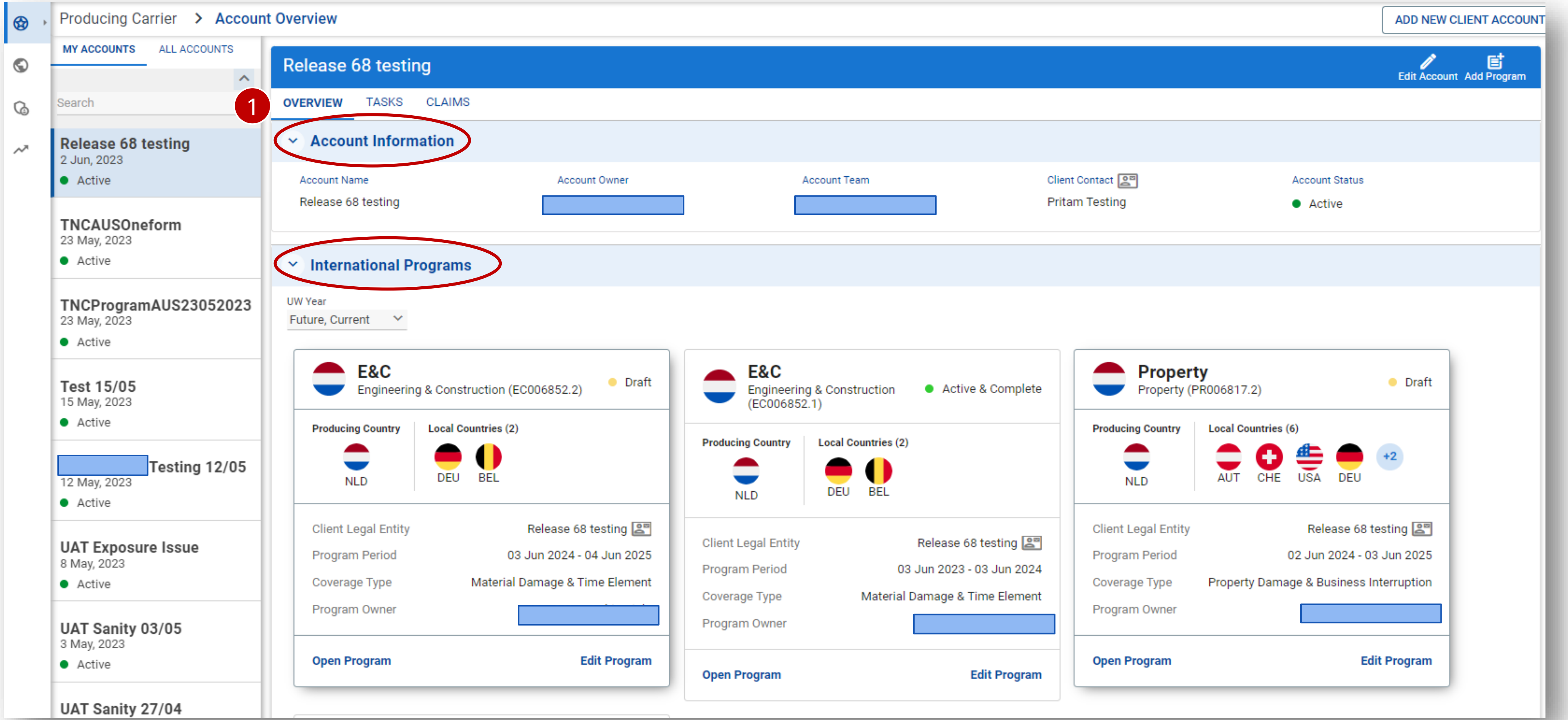
Account Overview – Overview, Tasks, Claims

For each account, on account overview, I have 3 overview features:

1 **Overview**: an overview on that account information and its international programs

2 Tasks**:** an overview on all tasks for that account

3 Claims: an overview on all claims for that account



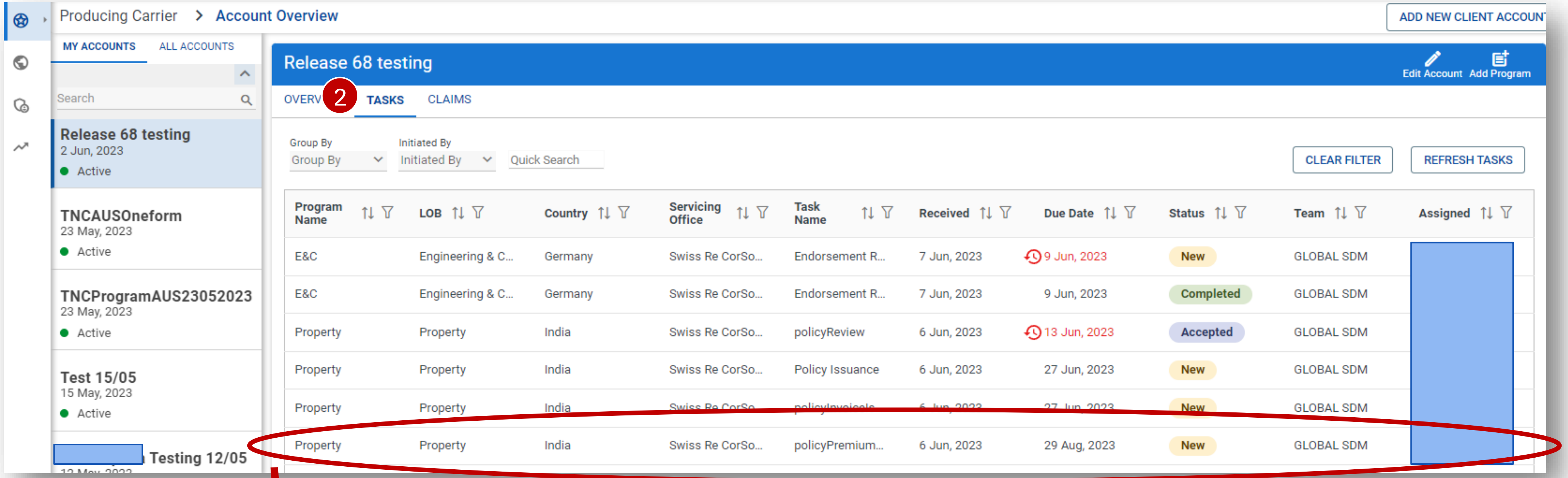
Account Overview – Overview, Tasks, Claims

For each account, on account overview, I have 3 overview features:

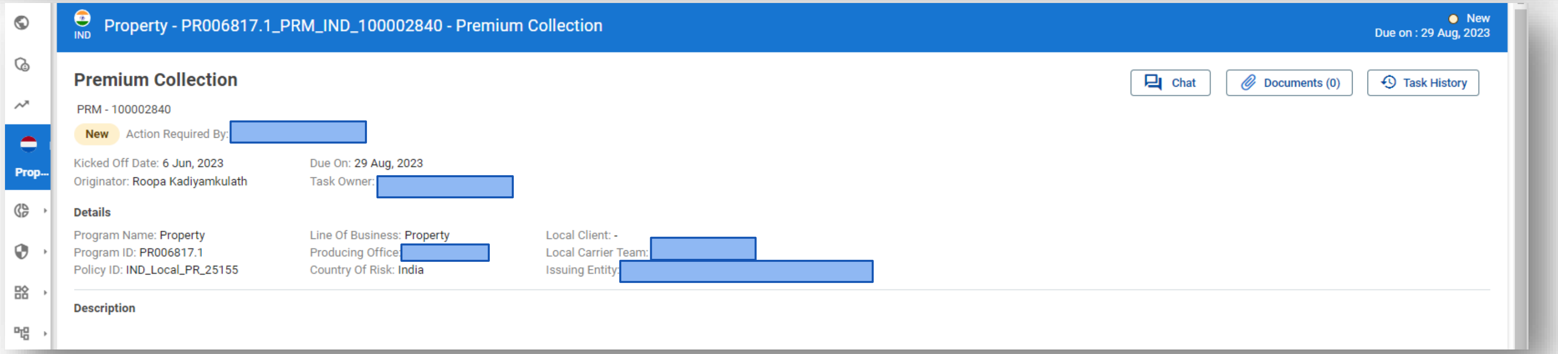
1 Overview: an overview on that account information and its international programs

2 **Tasks:** an overview on all tasks for that account

3 Claims: an overview on all claims for that account



click



To know more about tasks, **click here** and **here**

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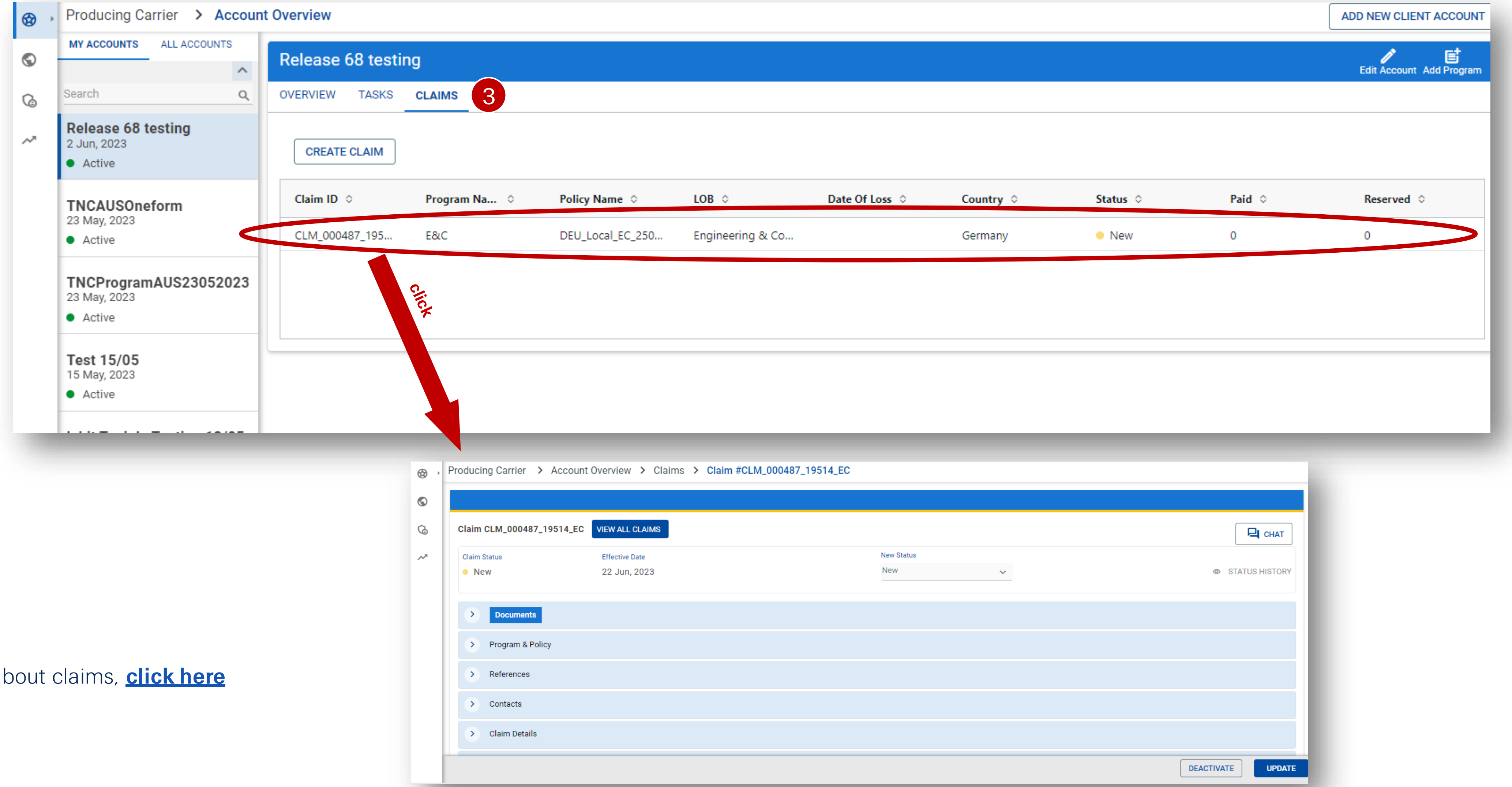
Account Overview – Overview, Tasks, Claims

For each account, on account overview, I have 3 overview features:

1 Overview: an overview on that account information and its international programs

2 Tasks: an overview on all tasks for that account

3 **Claims**: an overview on all claims for that account



To know more about claims, [click here]

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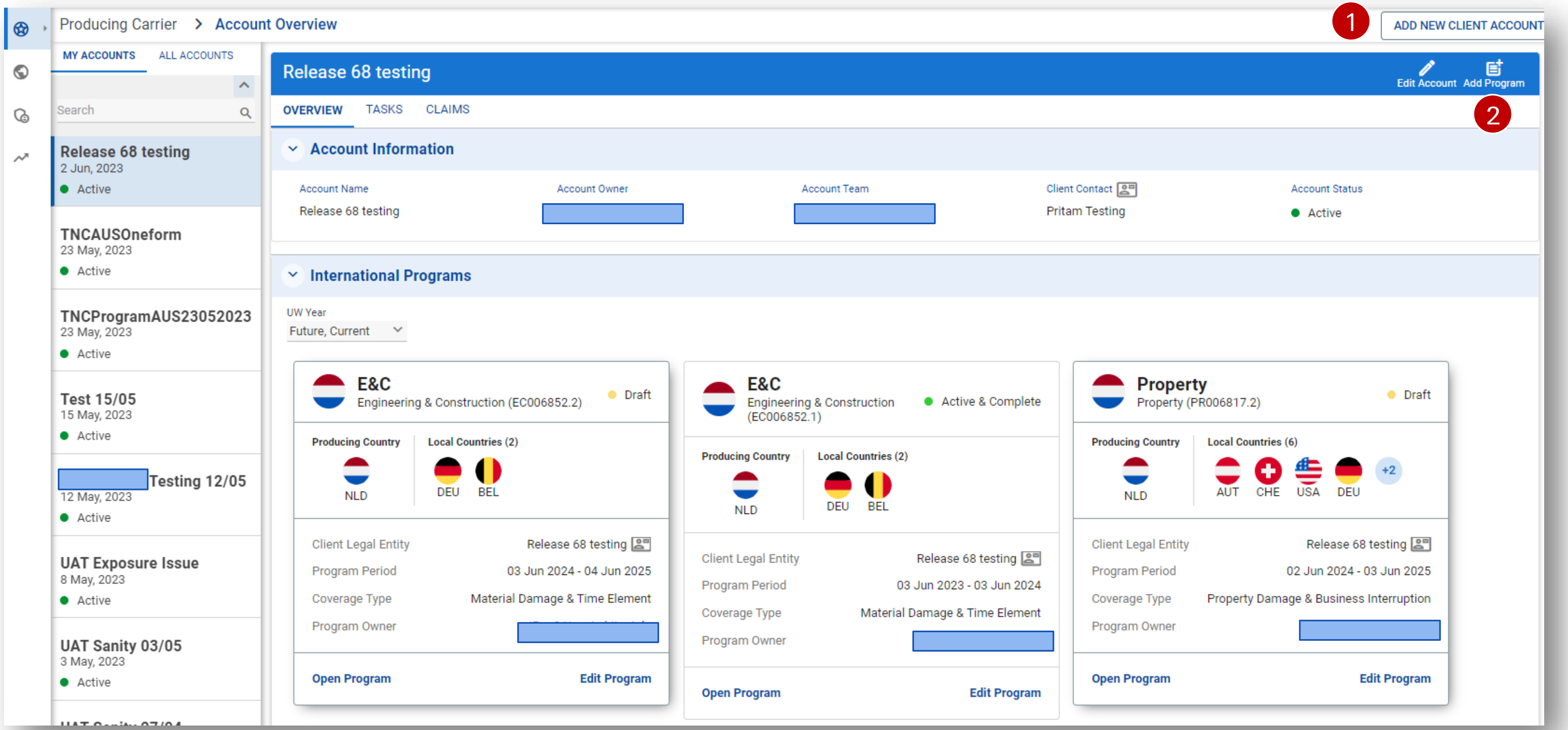
Program Overview – Create or Edit an Account



To create a Program, the user needs to either:

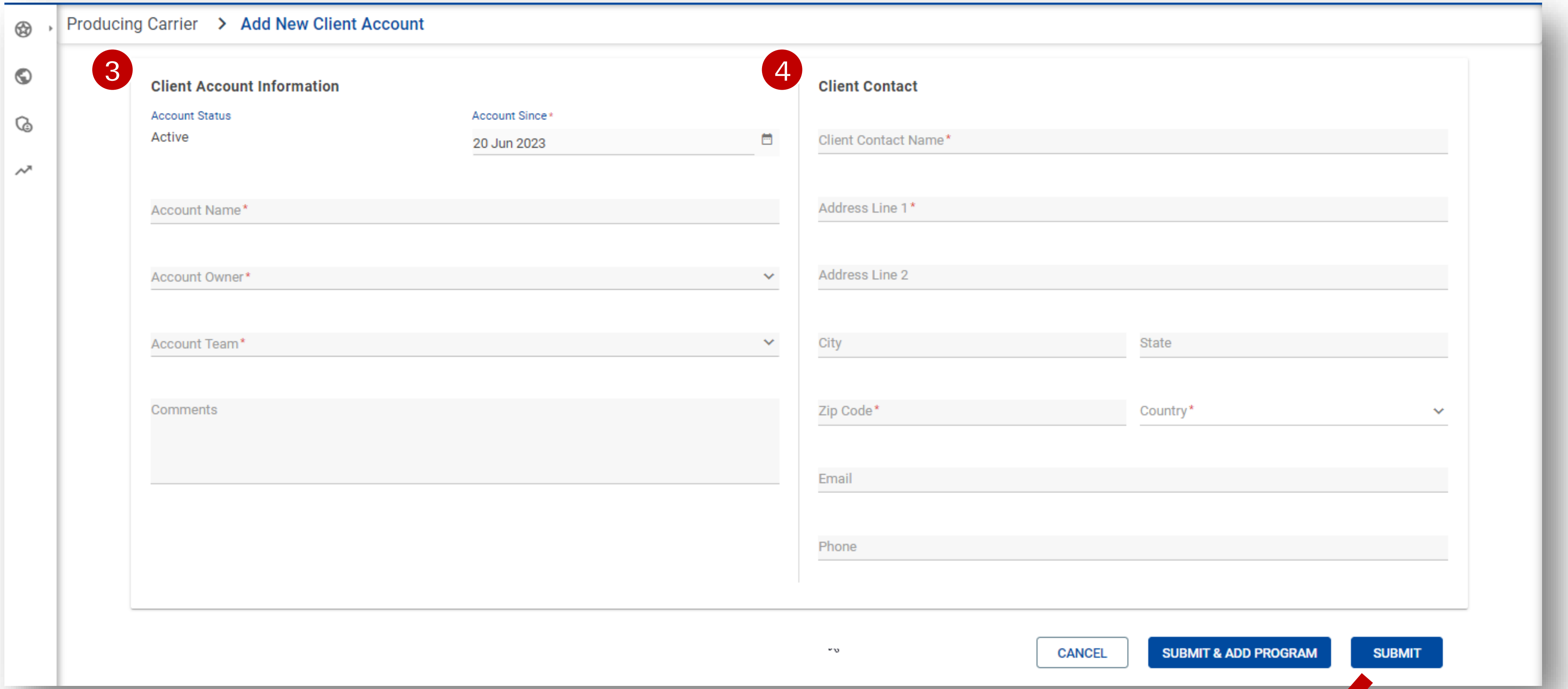
1 **Create** a new account

or

2 **Edit** an existing account

in order to create a Program

Program Overview – Create an Account



In this step, the user is requested to add information about:

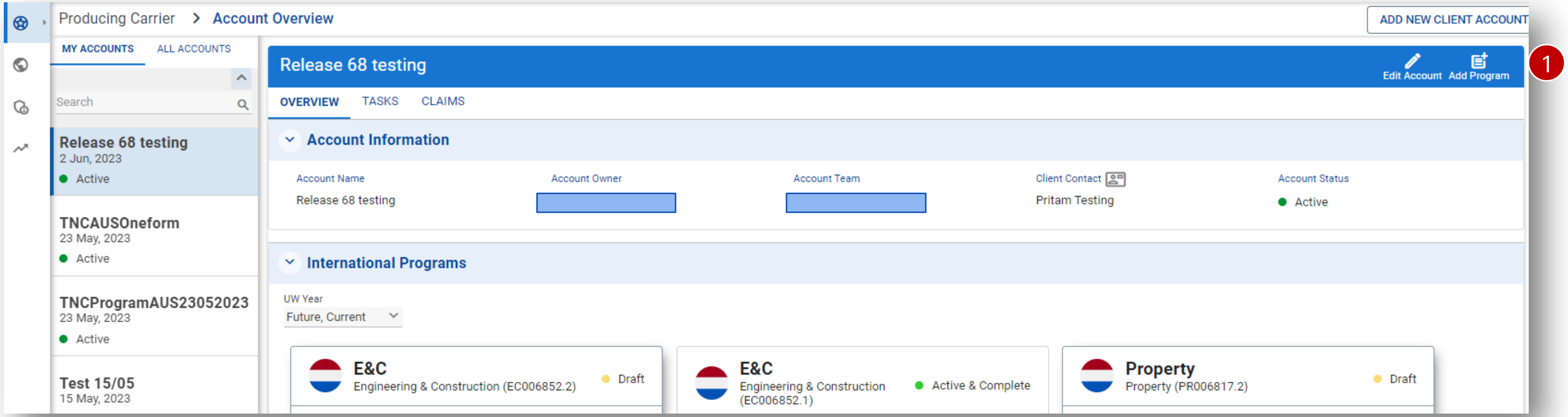
3 **Client Account Information** (e.g., The headquarters)

4 **Client Contact** (e.g., the risk manager)

Fields marked with * are mandatory to set up an Account.

Once you finish, click **Submit** to create the Account. If you click on **Submit & Add Program**, you will go directly to the Program Creation screen [here](#).

Program Overview – Create a Program



A new Program can be created:

1. By **adding a Program** to an already existing Account **or**
2. While **creating a new Client Account** – in these steps **here**

Program Overview – Create a Program

To create a new Program,

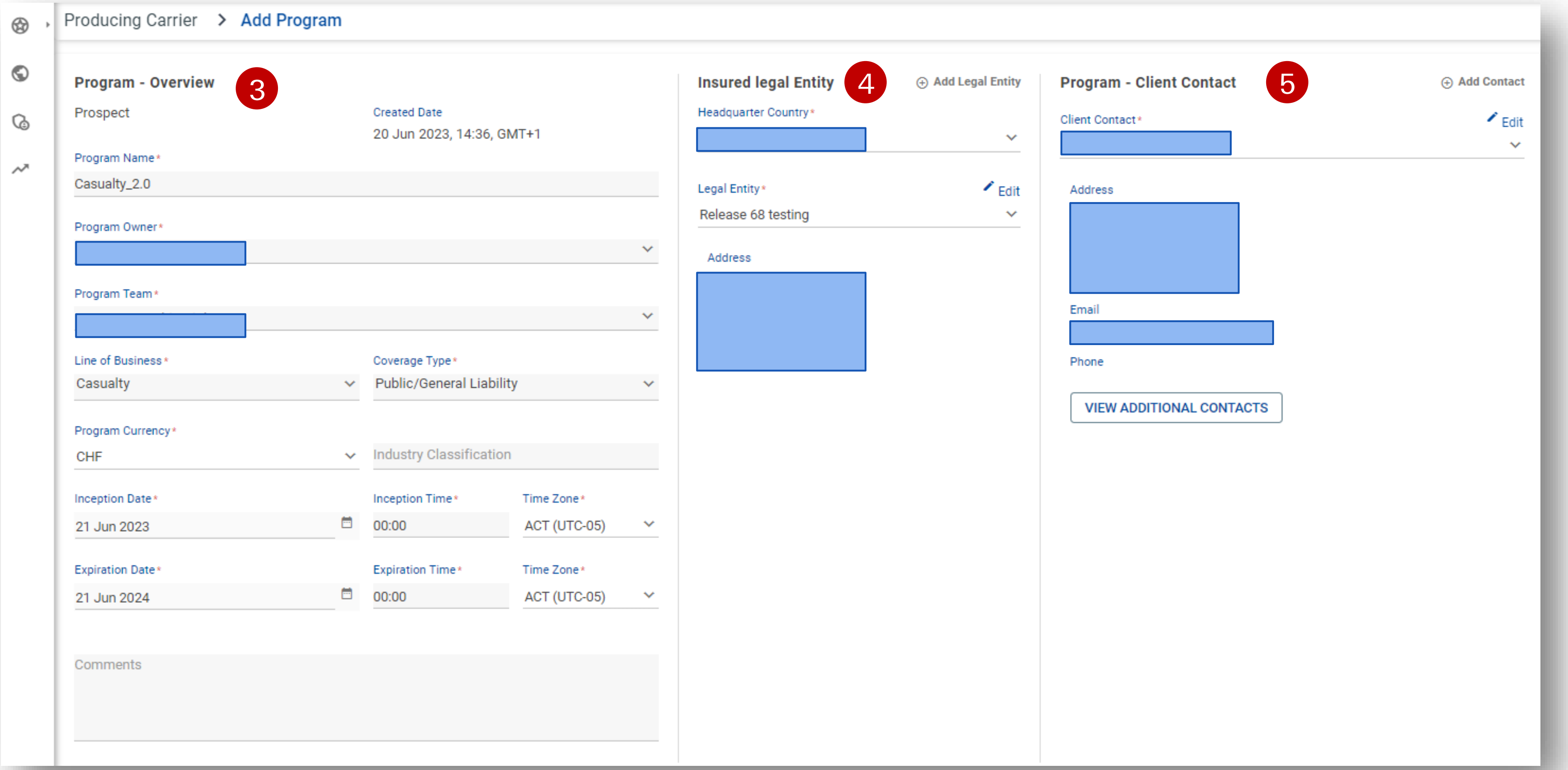
3 **General Program Information**, such as LoB, Currency, Inception and Expiration Date

4 **Insured legal Entity Information**

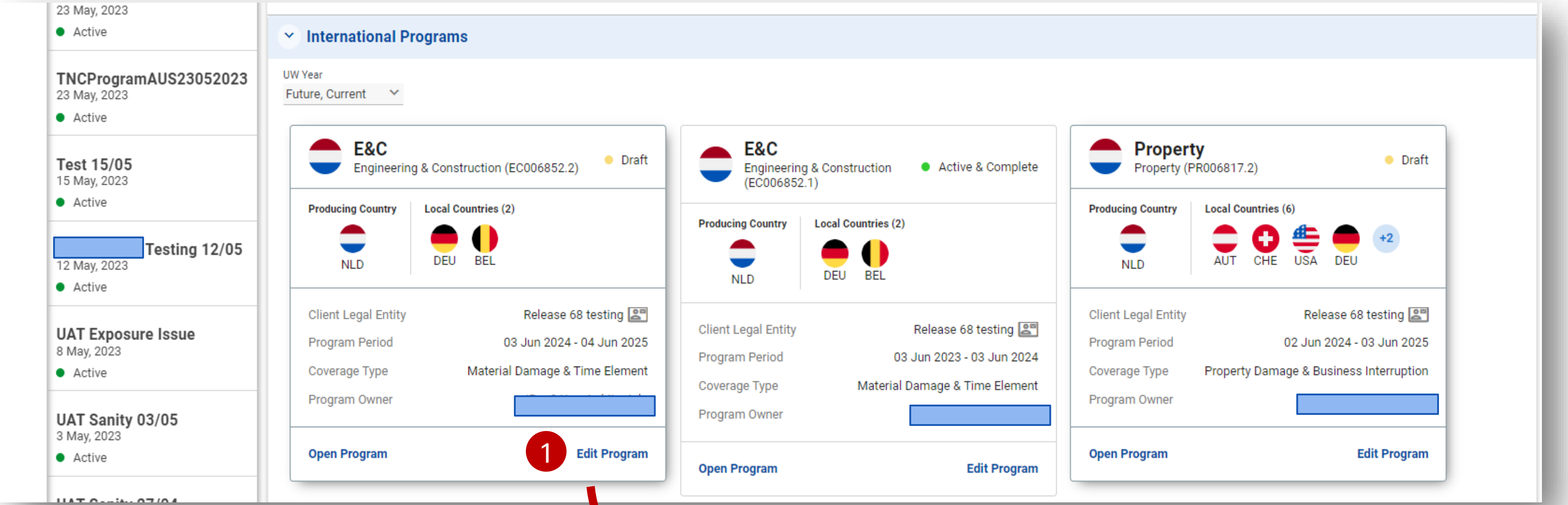
5 **Client Information**

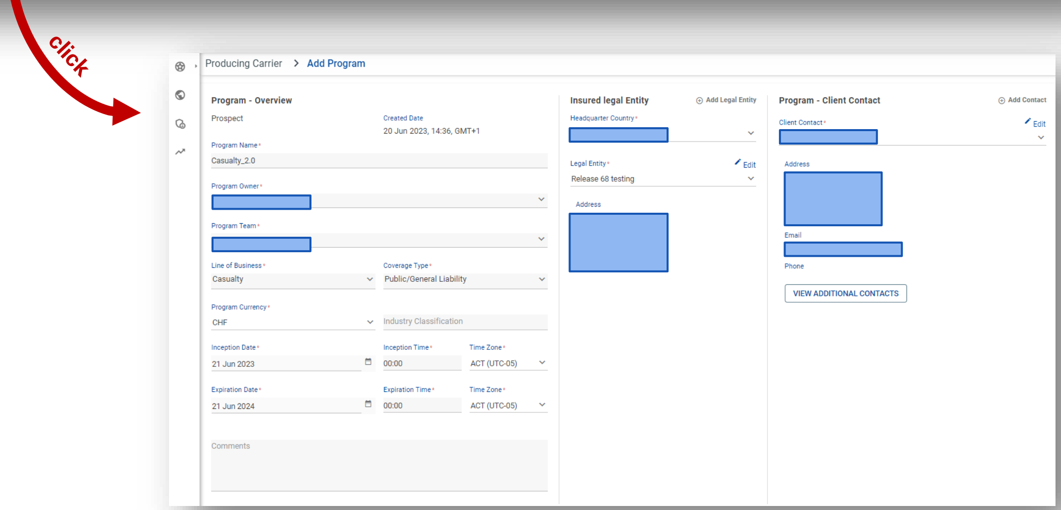
N.B. Information already entered on Account level is pre-populated but can be changed if applicable.

Fields marked with * are defined as mandatory to proceed with the Program creation



Program Overview – Edit a Program



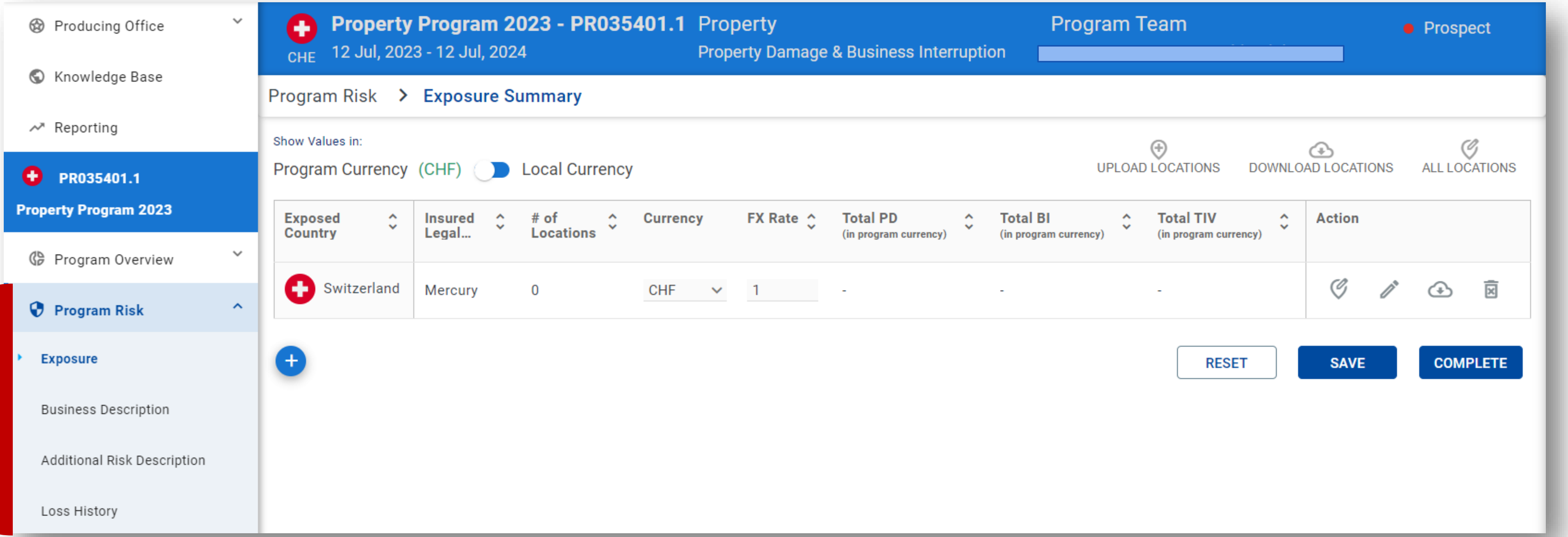


1 The user can also **edit** the **Program information** of an exiting Program in the Account Overview

Program Risk

03

Program Exposure and Risk Information – Property



1 In the **Program Risk** module, the user can add:

- Exposure data
- Business Description
- Risk Description
- Loss History data & comments

Property Upload

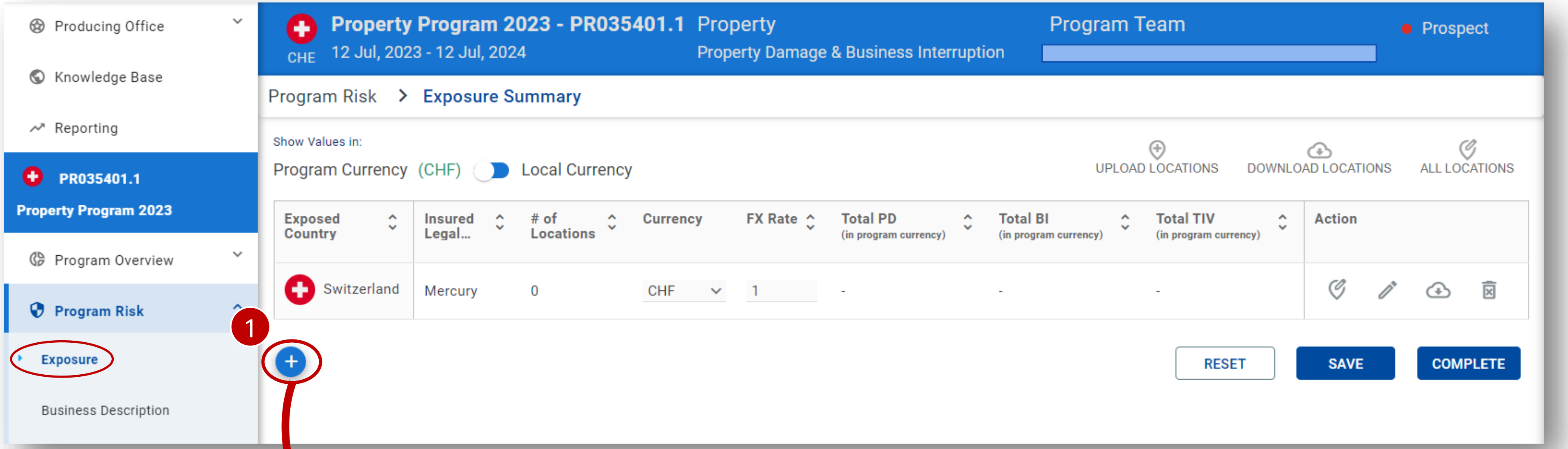
03.1

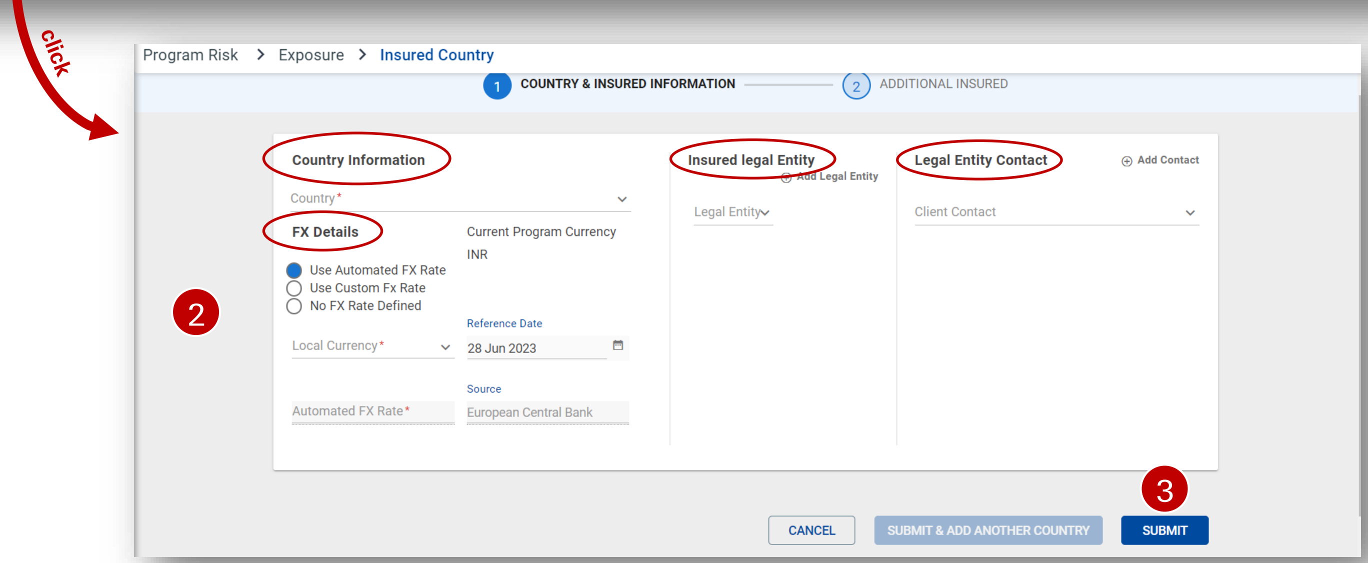
Add Country & Insured Information manually – Property

Start by adding your exposed countries data either **manually** or **via an Excel Sheet** in the Exposure section.

Manually:

1. Click on the “plus” button.
2. Complete all the relevant fields with:
   - **Country Information**
   - **FX Details**
   - **Insured legal Entity**
   - **Lega Entity Contact**
3. Click “Submit” to save.

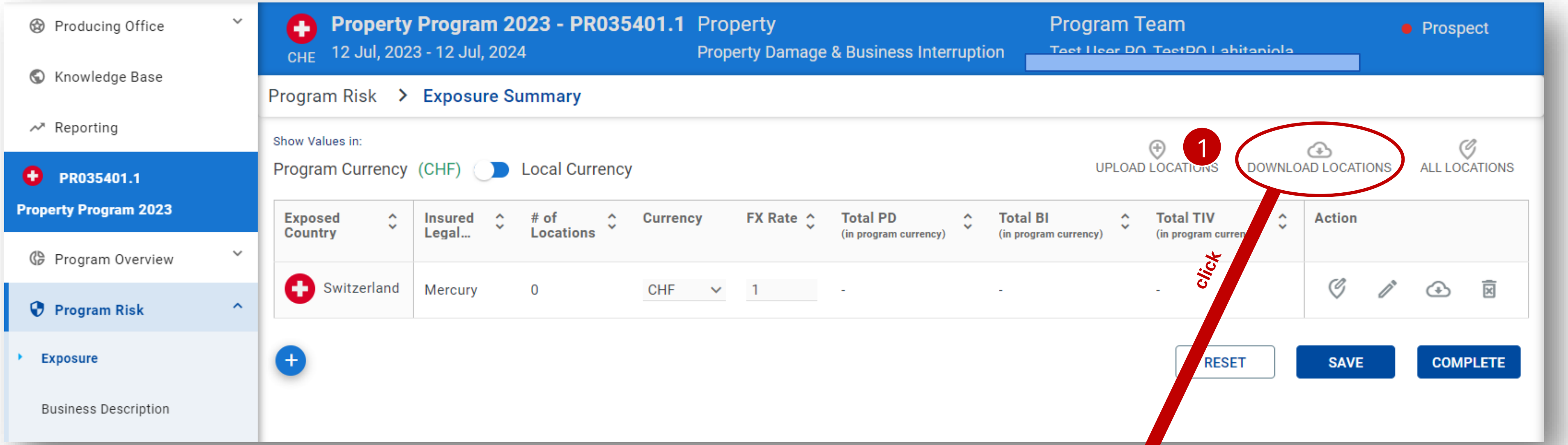


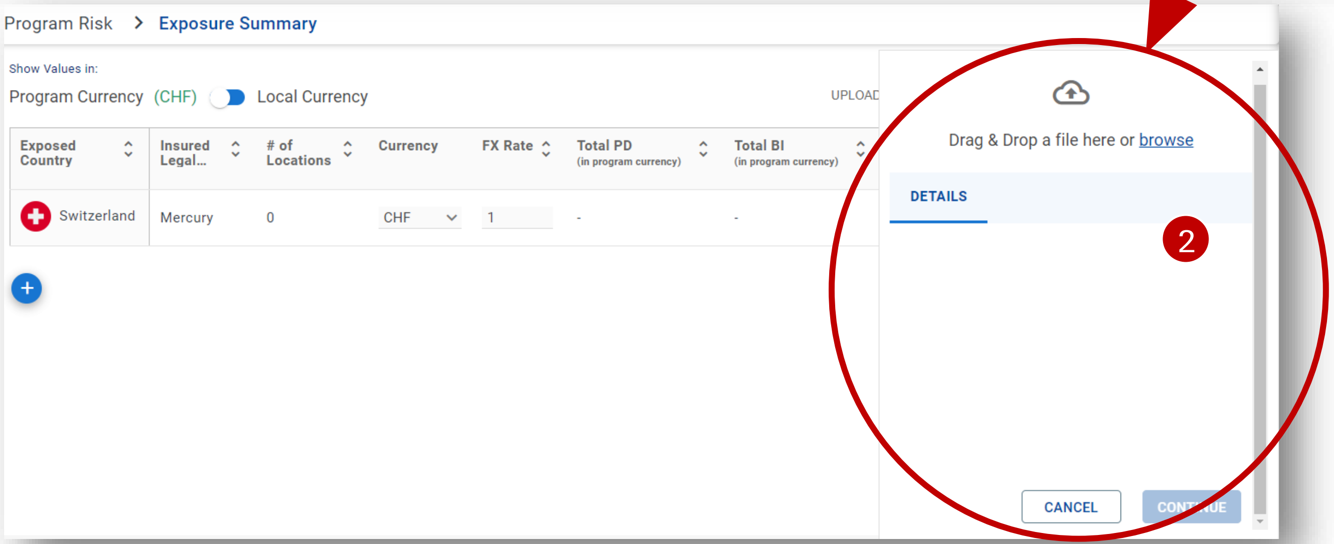


Add Country & Insured Information via Excel Sheet – Property

Via Excel Sheet:

1. Click on the "Upload Locations" button.
2. Browse and select the Excel file which contains the exposure details.





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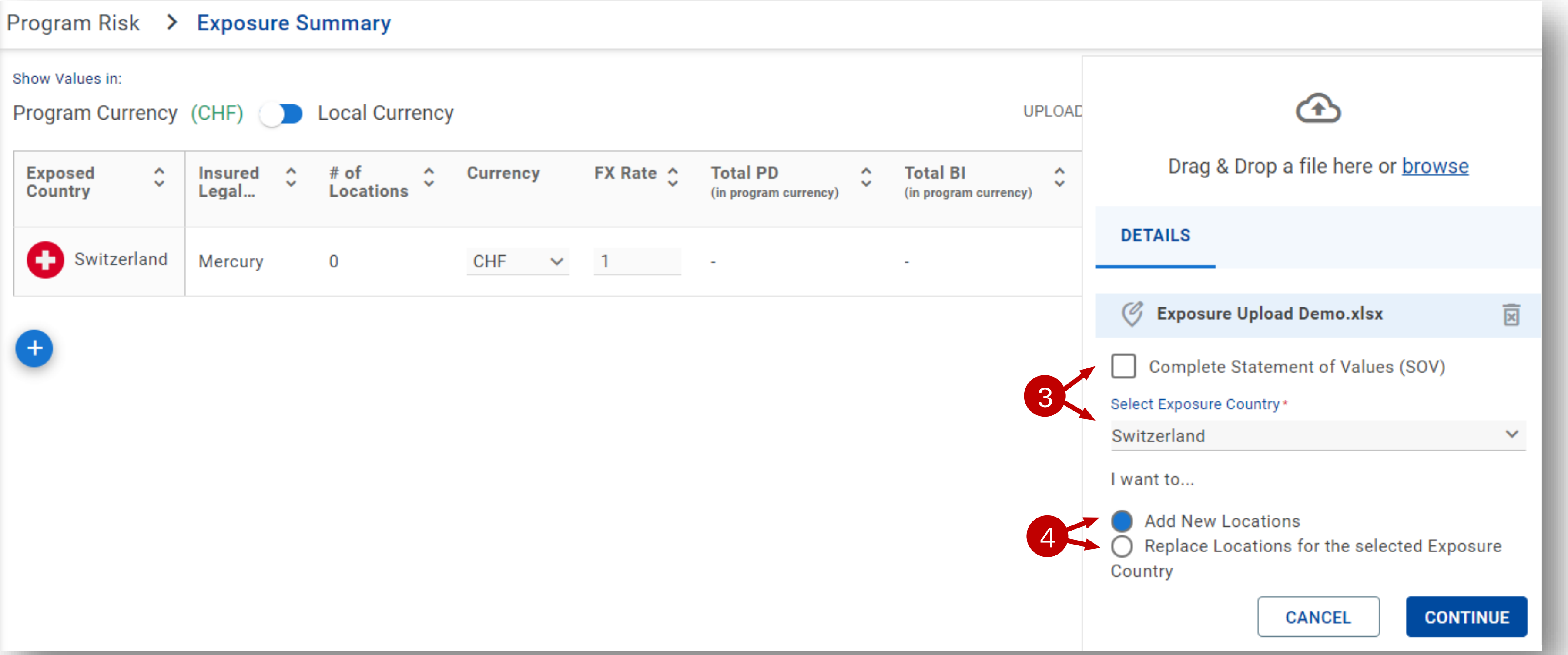
Exposure Upload – Details



Before extracting the data, the user has to instruct how to use the exposure upload:

3. The user can upload a complete file for all exposure countries **or** for specific countries only.

4. The user can add exposure on top of the already existing data **or** replace earlier submitted data.

"Continue" to go to next screen.

Exposure Upload – Excel sheet

Data

Countries

Country	Subsidiary Name	Currenc	Rate of Exchan	Total Turnover (EUI	Annual Wages Total (E	Total Employe	State	City	Address	Postal Cod	Domestic Turno	Exports to USA/Can	Exports RoW	# Blue Collar Employ	Annual Wages Blue Cc	# White Collar Employ	Annual Wages White Co	Main Activity	% Main Activi	Activity 2	% Activity	Activity 3	% Activity	Comment
France	Casualty Upload Test !	EUR	1	418'350'100	42'370'061	620	Île-de-Franc	Paris	Rue	75015	400'900'100	17'350'000	100'000	544	35'070'000	76	7'300'061	Chemicals	88.0	Pharmaceuticals	12.0			Test comment 1
MDG	Madagascar Test S.A.	MGA	4'889.0	3'901'000	1'804'456	71	Toamasina	Toamasina	Avenue	501	3'731'000	0	170'000	58	1'300'000	13	504'456	Chemicals	60.0	Pharmaceuticals	40.0			
Benin	Bénin Test S.A.	XOF	655.96	2'100'000	1'663'700	58	Littoral	Cotonou	n/a	n/a	2'100'000	0	0	41	1'030'700	17	633'000		100.0					
Switzerlan	Bündner Test AG	CHF	0.976	106'088'123	15'271'000	163	GR	Glaris	Davoser Hauptstraße	7270	77'888'123	5'100'000	23'100'000	148	13'400'000	15	1'871'000	Pharma	66.0	Chemicals	20.0			Test comment 4
USA	Test Inc. (USA)	USD	1.09059	20'512'000	5'230'000	68	KS	Wichita	324 Alicia Motorway	67203	19'234'000		1'278'000	59	4'230'000	9	1'000'000	Chemicals	89.0	Automotive suppl	11.0			
Germany	Test GmbH	EUR	1	58'196'160	7'288'000	98	NRW	Frechen	Freiheitsring 17	50226	33'456'000	7'629'080	17'111'080	82	5'764'000	16	1'524'000	Chemicals	100.0					
Belgium	Test (BE) S.A.	EUR	1	32'107'300	732'000	7		Bruxelles	Boulevard Anspach	1000	28'651'200		3'456'100	0		7	732'000	Trading	100.0					

Exposure Details

This is an example of an Excel file with exposure data (turnover, wages, number of employees) by country.

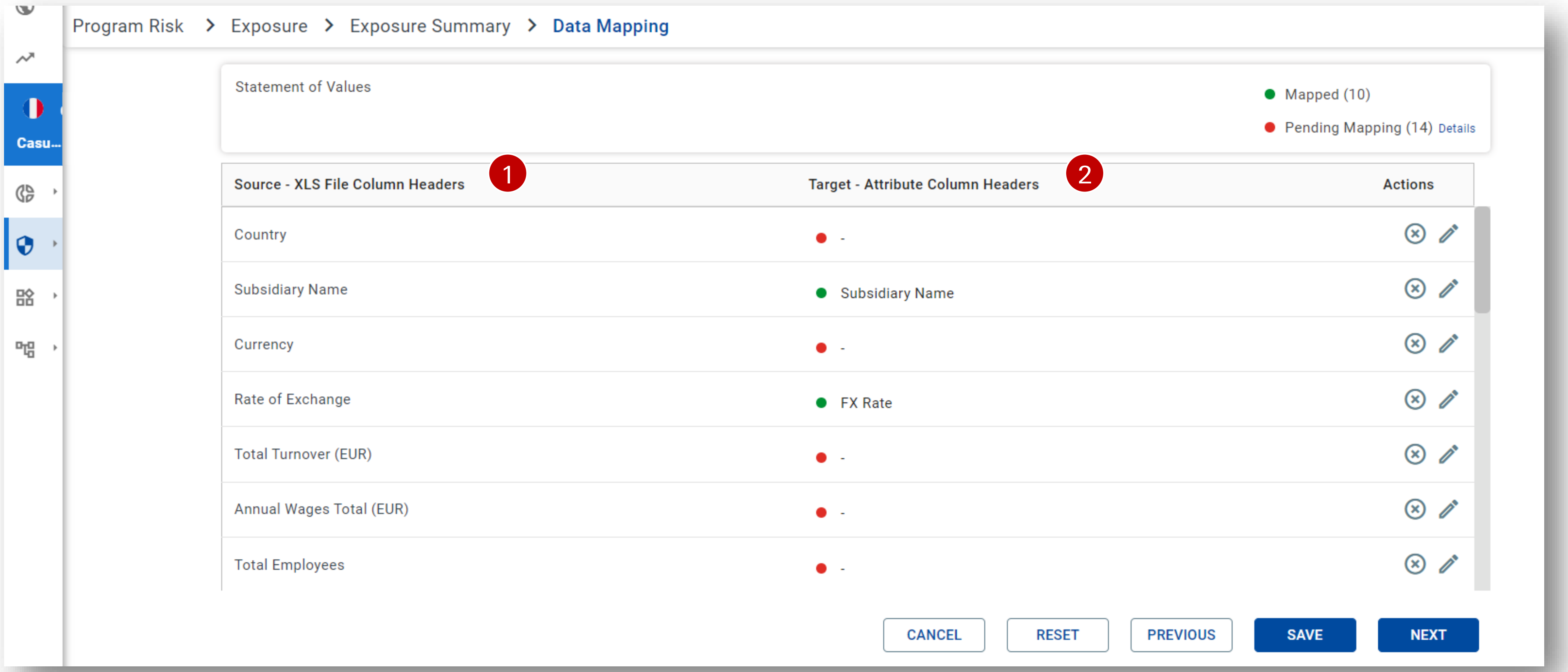
! **N.B.:** For the data to map correctly, the <u>countries/subsidiaries</u> must be filled in the <u>rows</u> and the <u>actual data</u> you want to upload must be in the <u>columns.</u>

Your column headers can differ from the terminology used in this example. It may be in non-English language as well.

The sorting order of columns does not matter.

Only data from 1st worksheet in Excel gets uploaded.

Exposure Upload – Data Mapping

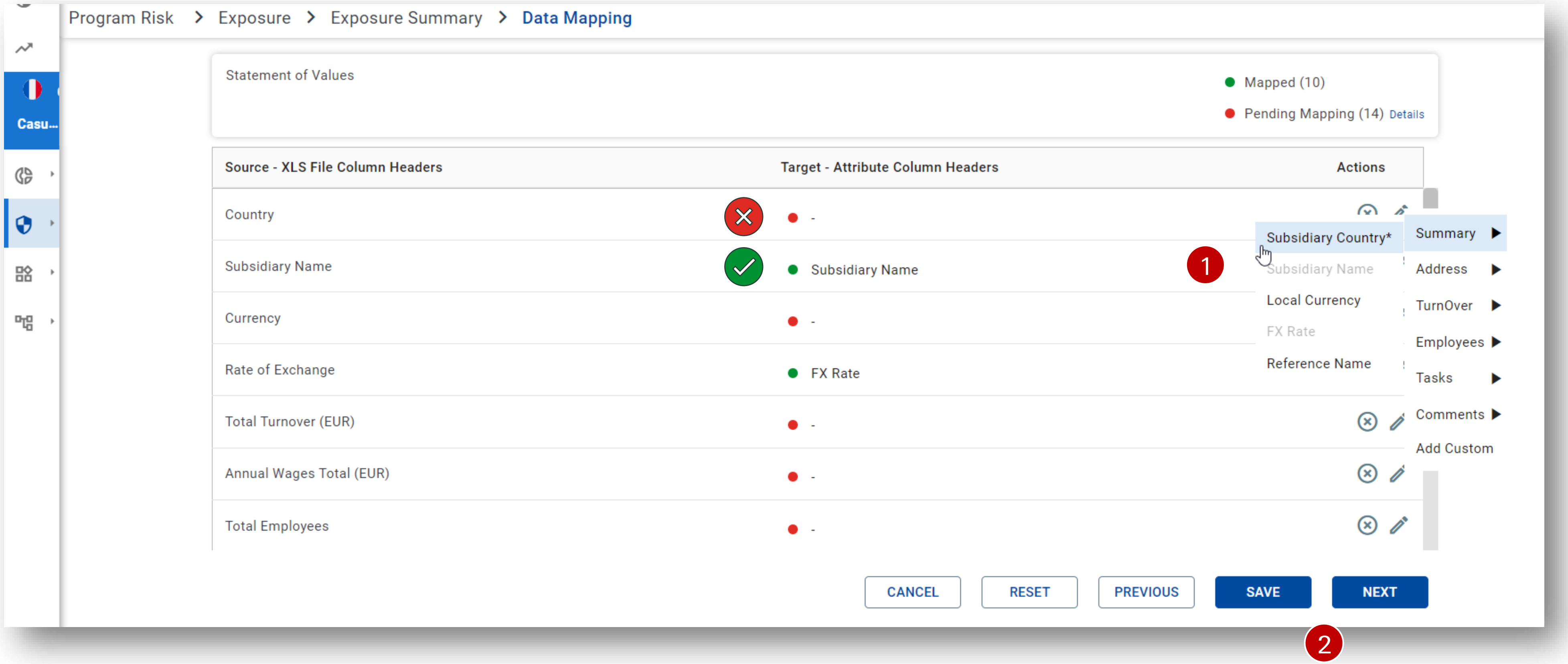


After selecting the Excel file, the user needs to map the attributes – from Excel sheet's terminology to PULSE naming.

1. In the first column, user finds the Excel column headers in the same sorting order as in Excel.

2. In the second column, please try to map to the PULSE Exposure-related attributes.

Exposure Upload – Data Mapping



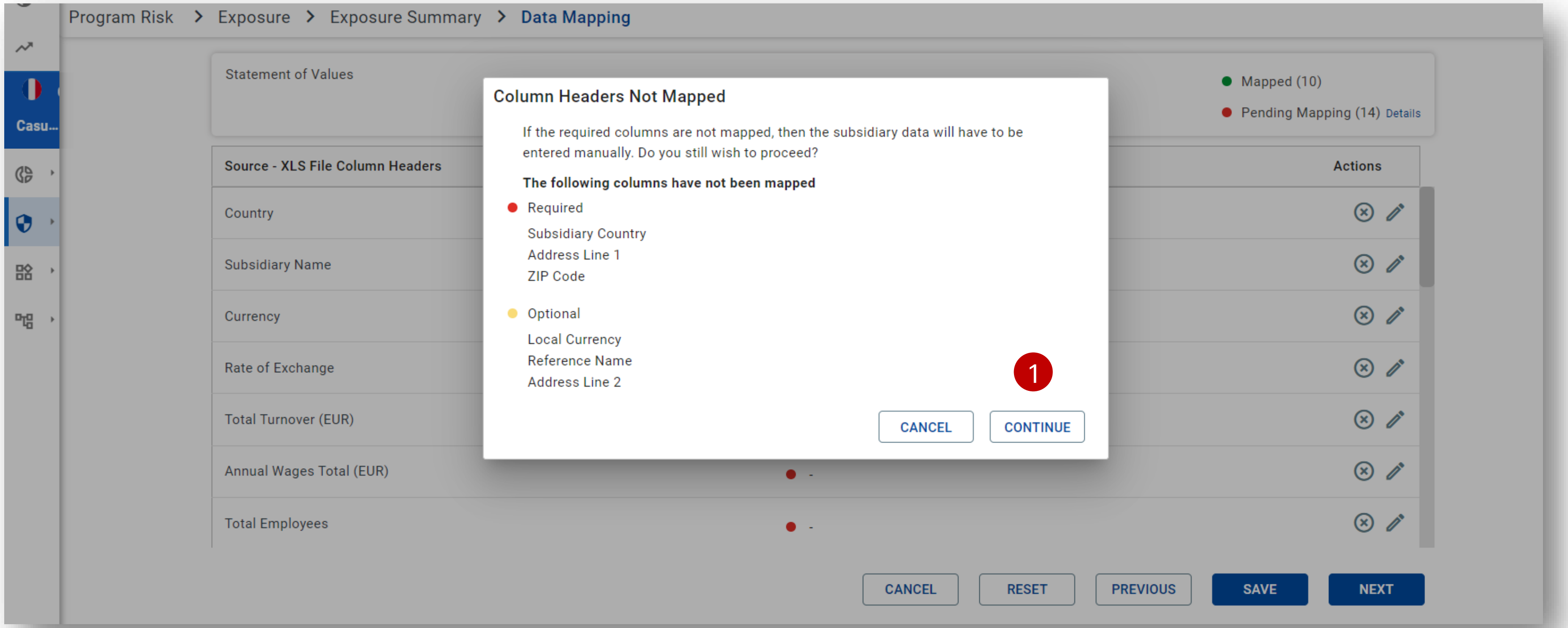
Some columns usually are identified and get mapped automatically.

Other columns need to be mapped manually.

1 Click on the icon and select the respective PULSE attribute.

2 Once the user has mapped all attributes, save and click “Next”.

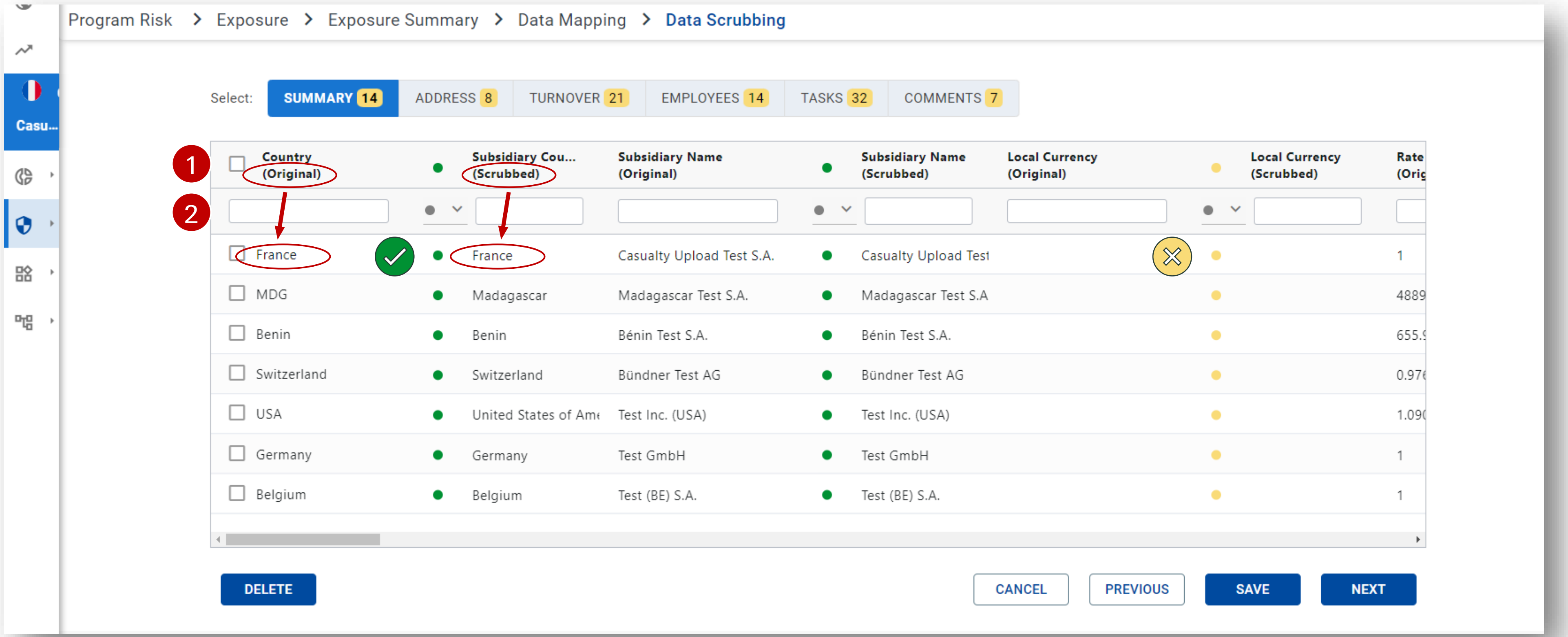
Exposure Upload – Finish Data Mapping



1. After Next, the user gets a warning pop-up, in case that mandatory or optional PULSE attributes have not been mapped. **You may go back to Mapping by clicking 'Cancel'.** Once the user completes the mapping, click "Continue".

! **N.B.:** Optional attributes may be left empty, you can continue.

Exposure Upload – Data Scrubbing



1. The user now sees the "original" content extracted from Excel and next to it the "scrubbed" values as will be saved into PULSE attributes.

2. The user can filter the values in respective column, for easier data checking.

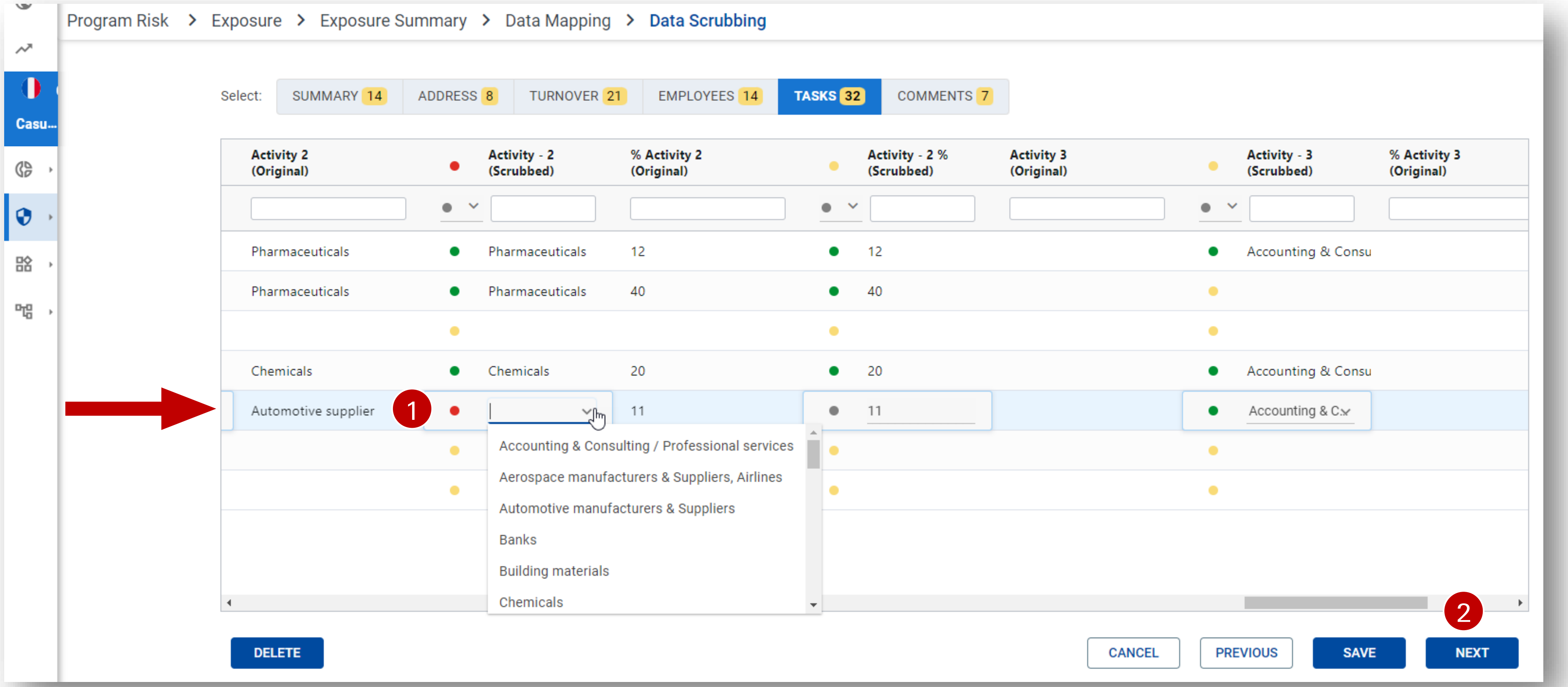
3. Save and click "Next".

Green dot: value successfully scrubbed.

Yellow dot: unable to scrub/ fill an optional attribute.

Red dot: unable to scrub a mandatory attribute.

Exposure Upload – Data Scrubbing



1. In case of a red dot, double click into the cell that you want to modify and enter the missing value or select from dropdown.
2. Save and click “Next”.

Green dot: value successfully scrubbed.

Yellow dot: unable to scrub/ fill an optional attribute.

Red dot: unable to scrub a mandatory attribute.

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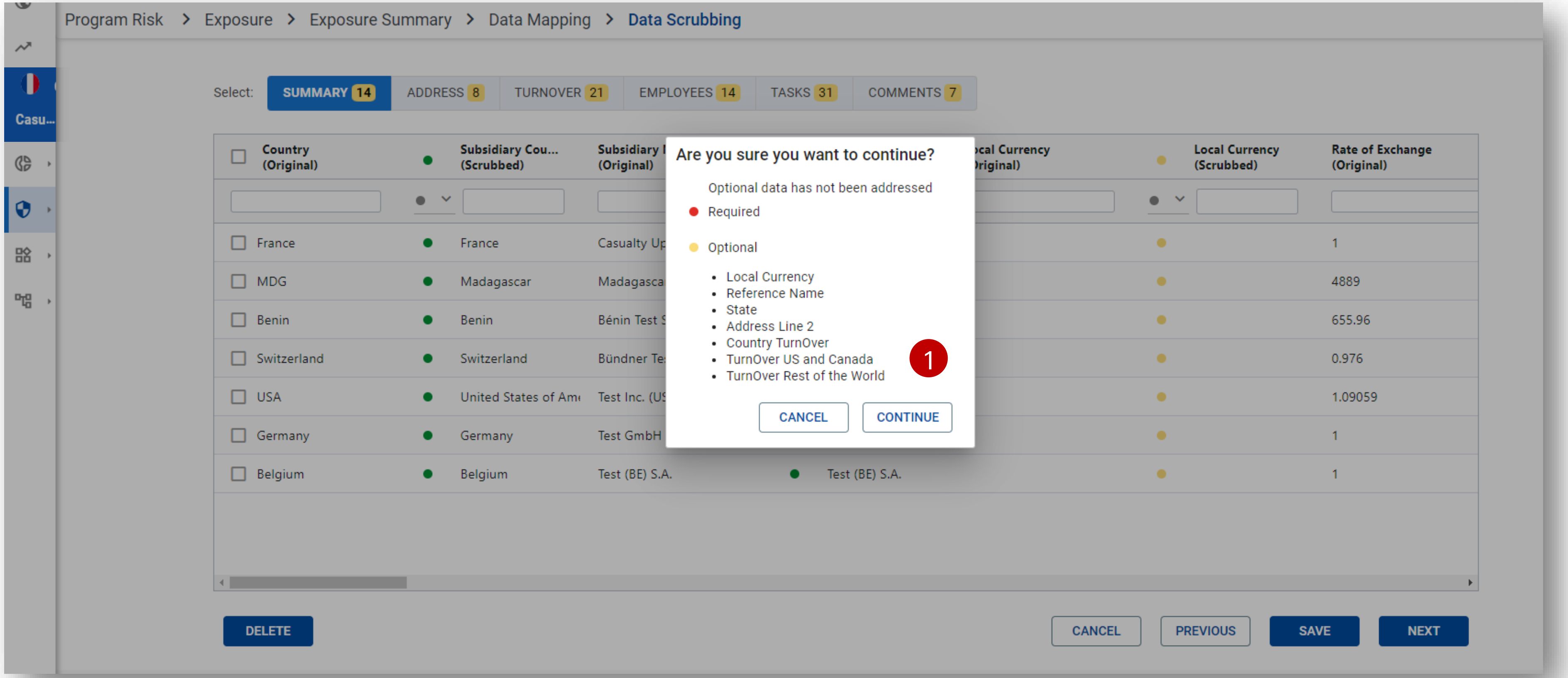
Exposure Upload – Data Scrubbing



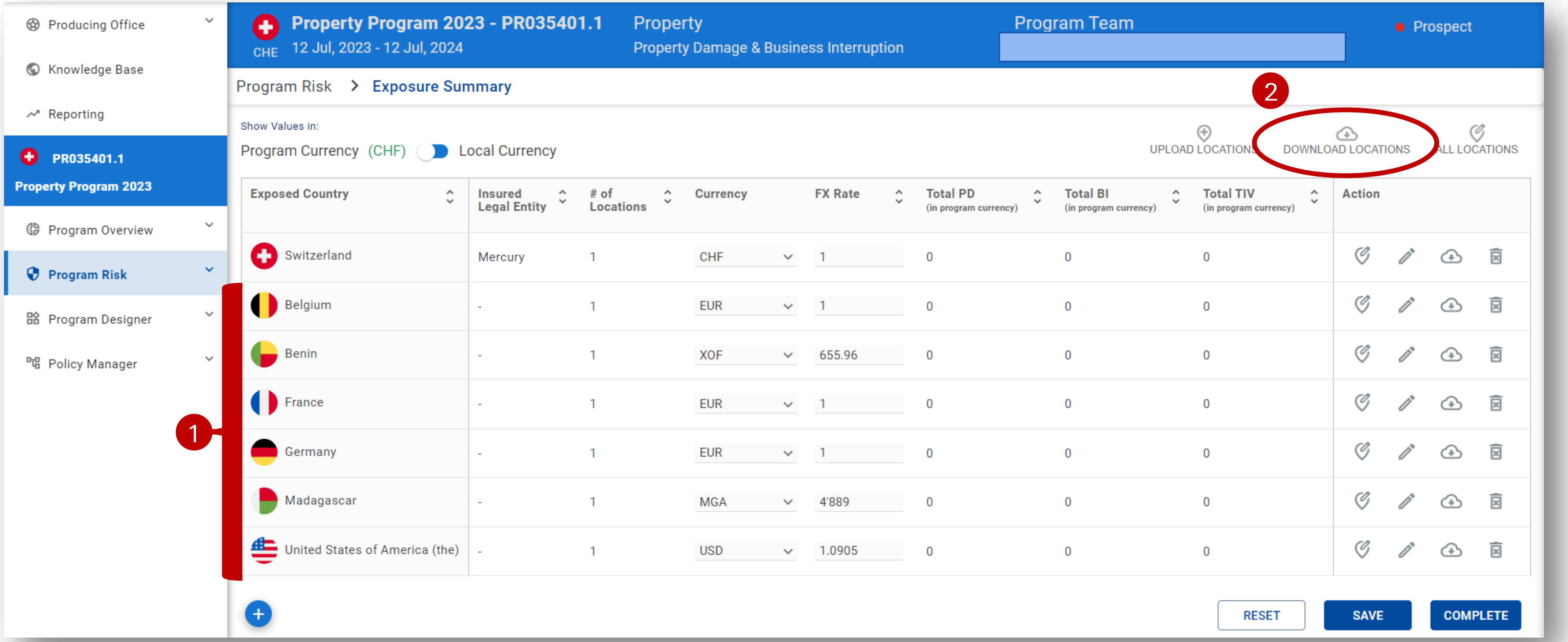
1 The user gets a warning pop-up, in case that mandatory or optional information was not provided.

Click on 'Cancel' in order to improve the scrubbing.

Once the user completes the scrubbing, click "Continue".

! **N.B.:** Optional attributes do not have to be filled out in every row.

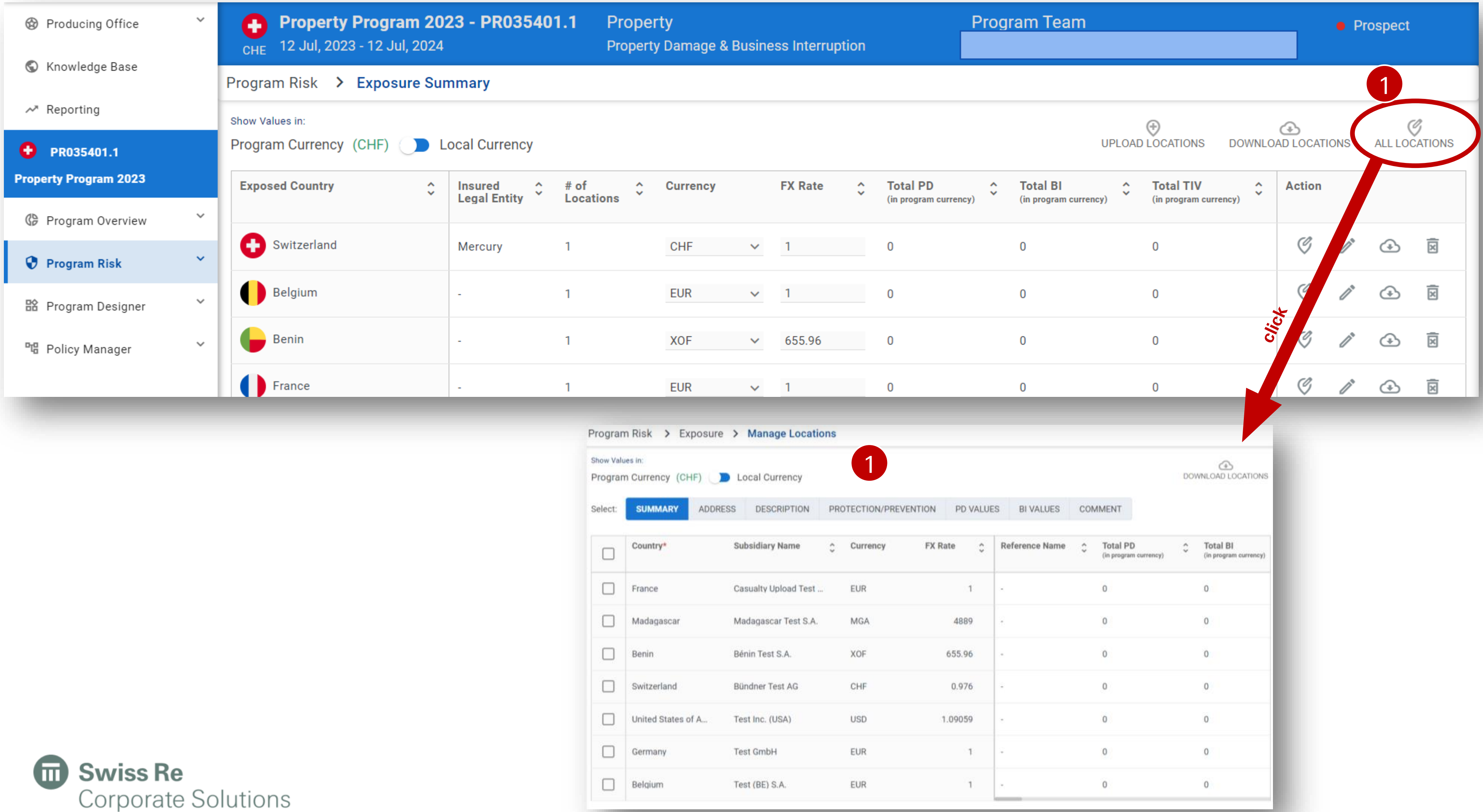
Exposure Upload – Summary



1. The user can now see (and check) all uploaded exposure data by country, including the calculated 'Totals'.

2. All exposure details can also be downloaded into an Excel sheet by clicking on “Download Locations”.

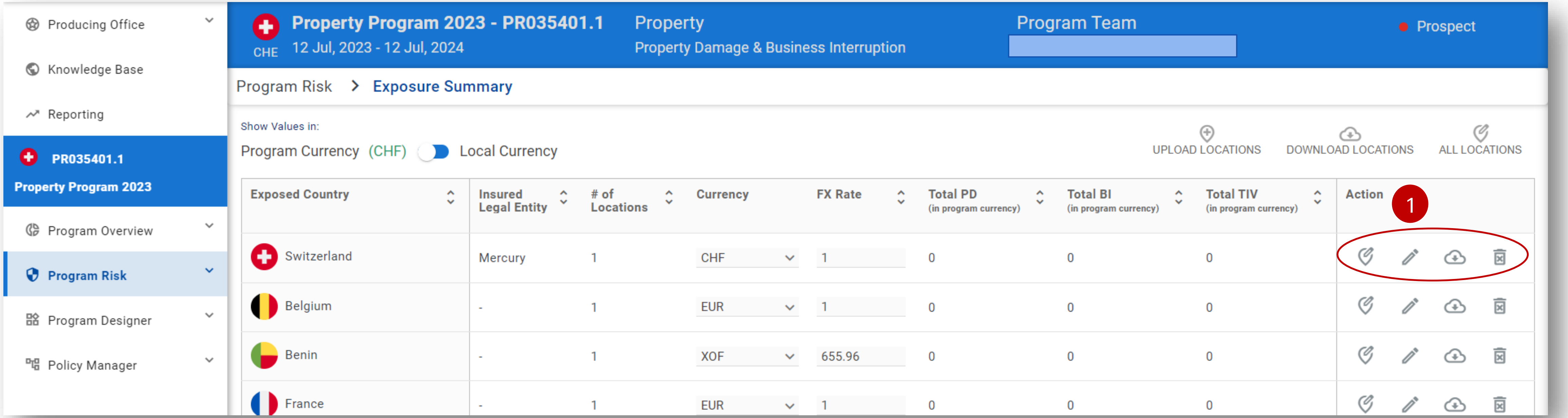
Exposure Upload – All Subsidiaries View



1. On "All Locations", the user has a holistic overview of all locations.

The user can check, edit, and add new country rows.

Actions



1 For each country row, the user has 4 actions available:

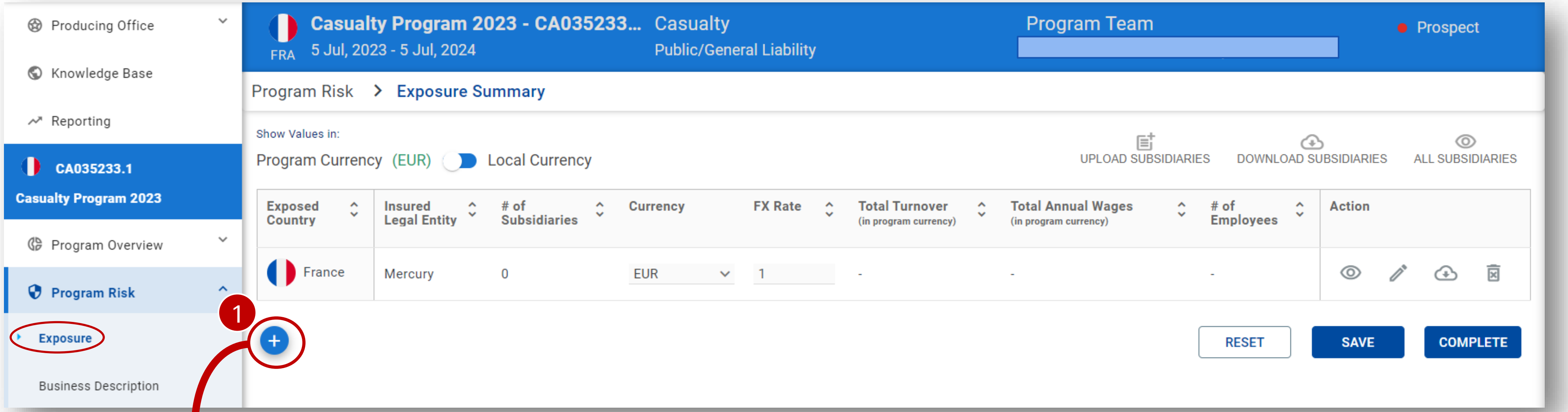
- On **Locations**, the user can check and edit the Exposure Details and attached documents.
- On **Country & Insured**, the user can check and edit the Country's & Insured information
- On **Download Group Locations,** an Excel sheet containing the respective exposed country's locations and information will be generated and downloaded.
- On **Delete**, the country entry will be deleted

Casualty Upload

03.2

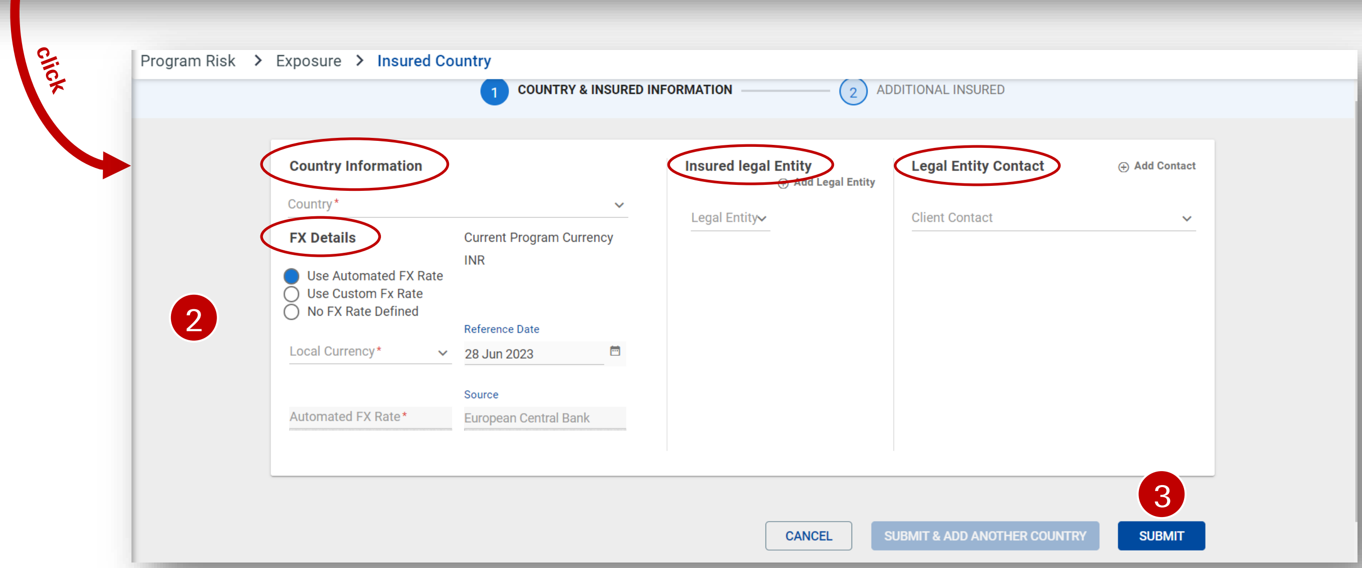
Add the Country & Insured Information manually – Casualty

Similar to Property, start by adding your exposed countries data either **manually** or **via an Excel sheet** in the Exposure section.



Manually:

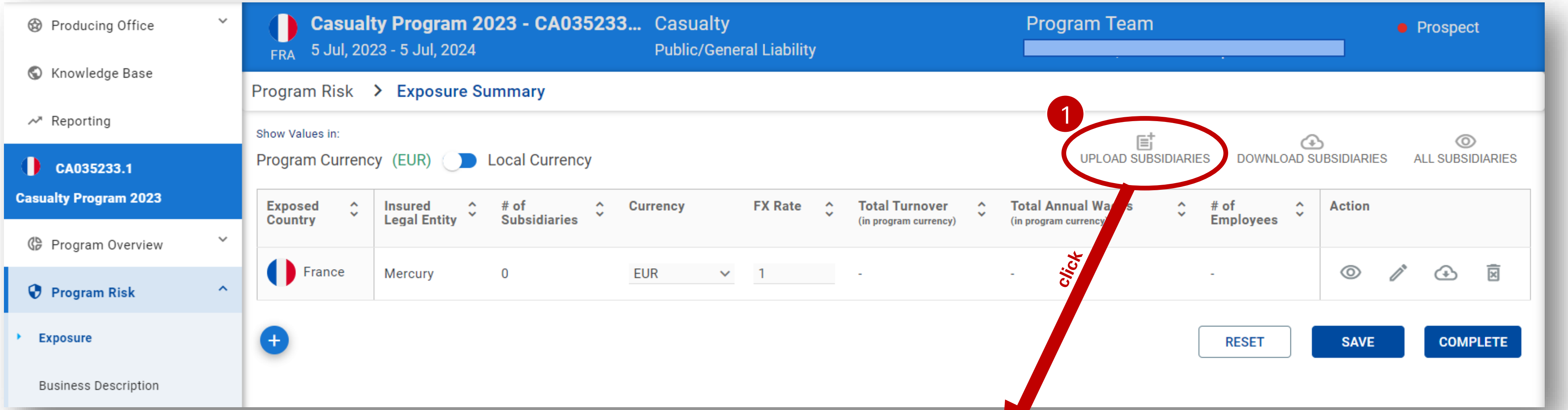
1. Click on the "plus" button.
2. Complete all the relevant fields with:
   - **Country name**
   - **Currency and FX rate**
   - **Insured legal Entity**
   - **Legal Entity Contact**
3. Click "Submit" to save.

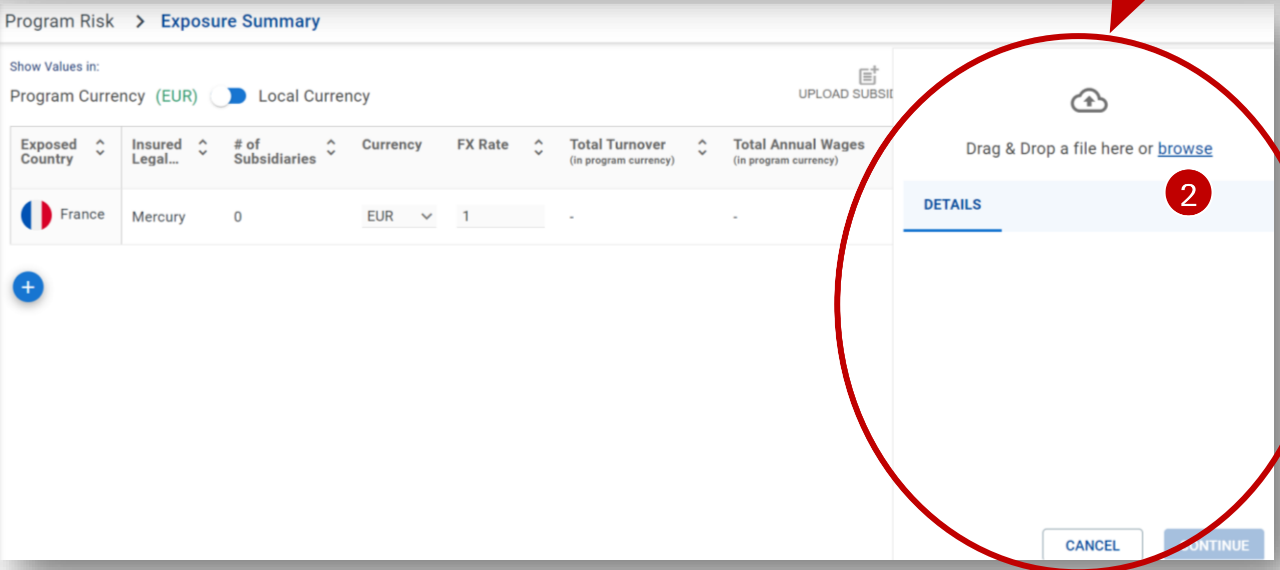


Add the Country & Insured Information from Excel sheet – Casualty

Via Excel sheet:

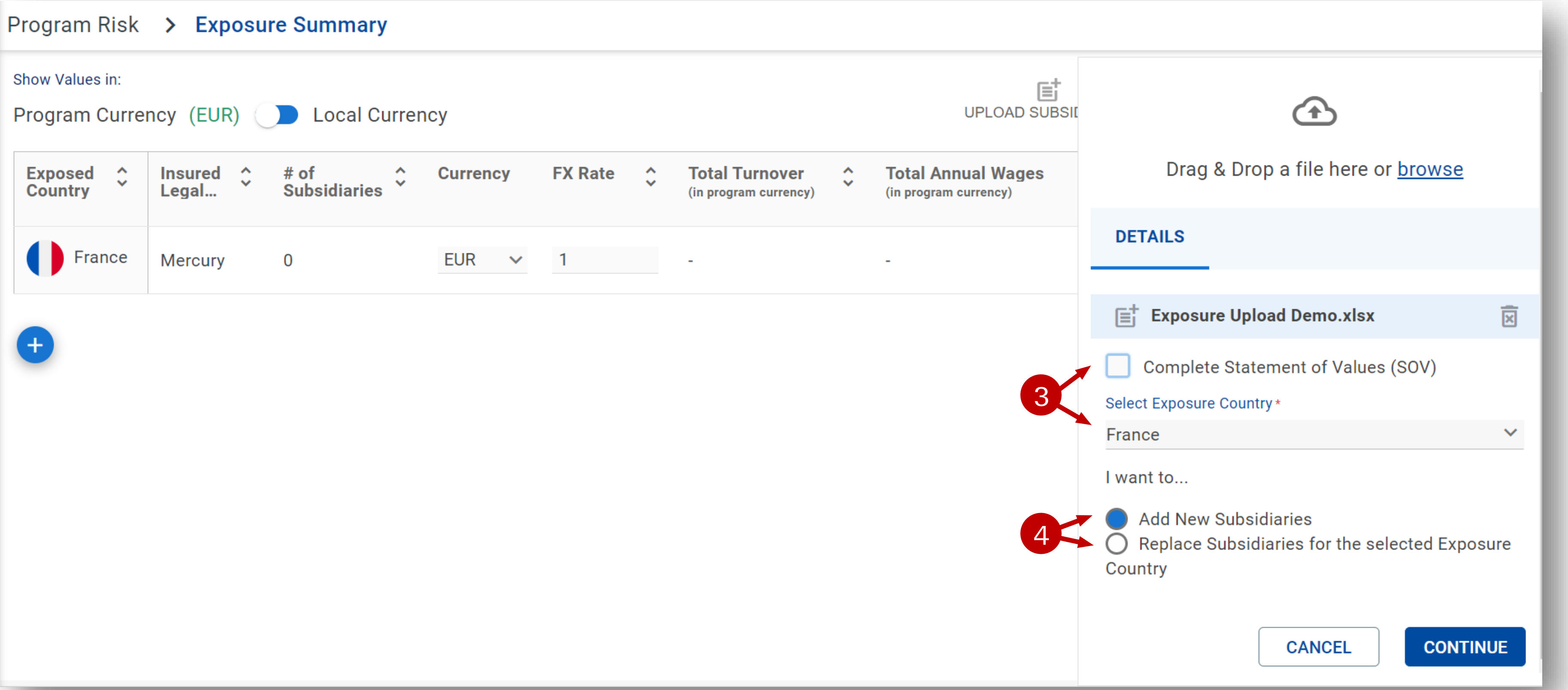
1. Click on the "Upload Subsidiaries" button.
2. Browse and select the Excel file containing the exposure details.





next step on next slide

Exposure Upload – Details



Before loading the data, the user has to instruct how to use the exposure upload:

3 The user can upload one complete file for all exposure countries **or for** specific countries only.

4 The user can add exposure on top of the already existing data **or** replace earlier uploaded data.

"Continue" to save.

Exposure Upload – Excel sheet

Data

Countries

	A	B	C	D	E	F	G	H	I	J
1	Country	Subsidiary Name	Currenc	Rate of Exchan	Total Turnover (EU	Annual Wages Total (E	Total Employe	State	City	Address
2	France	Casualty Upload Test	EUR	1	418'350'100	42'370'061	620	Île-de-Franc	Paris	Rue
3	MDG	Madagascar Test S.A.	MGA	4'889.0	3'901'000	1'804'456	71	Toamasina	Toamasina	Avenue
4	Benin	Bénin Test S.A.	XOF	655.96	2'100'000	1'663'700	58	Littoral	Cotonou	n/a
5	Switzerlan	Bündner Test AG	CHF	0.976	106'088'123	15'271'000	163	GR	Glaris	Davoser Hauptstraße
6	USA	Test Inc. (USA)	USD	1.09059	20'512'000	5'230'000	68	KS	Wichita	324 Alicia Motorway
7	Germany	Test GmbH	EUR	1	58'196'160	7'288'000	98	NRW	Frechen	Freiheitsring 17
8	Belgium	Test (BE) S.A.	EUR	1	32'107'300	732'000	7		Bruxelles	Boulevard Anspach

	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y
1	Postal Cod	Domestic Turno	Exports to USA/Can	Exports RoW	# Blue Collar Employ	Annual Wages Blue Co	# White Collar Employ	Annual Wages White Co	Main Activity	% Main Activi	Activity 2	% Activity	Activity 3	% Activity	Comment
2	75015	400'900'100	17'350'000	100'000	544	35'070'000	76	7'300'061	Chemicals	88.0	Pharmaceuticals	12.0			Test comment 1
3	501	3'731'000	0	170'000	58	1'300'000	13	504'456	Chemicals	60.0	Pharmaceuticals	40.0			
4	n/a	2'100'000	0	0	41	1'030'700	17	633'000		100.0					
5	7270	77'888'123	5'100'000	23'100'000	148	13'400'000	15	1'871'000	Pharma	66.0	Chemicals	20.0			Test comment 4
6	67203	19'234'000		1'278'000	59	4'230'000	9	1'000'000	Chemicals	89.0	Automotive suppl	11.0			
7	50226	33'456'000	7'629'080	17'111'080	82	5'764'000	16	1'524'000	Chemicals	100.0					
8	1000	28'651'200		3'456'100	0		7	732'000	Trading	100.0					

Exposure Details

This is an example of an Excel file with exposure data (turnover, wages, number of employees) by country.

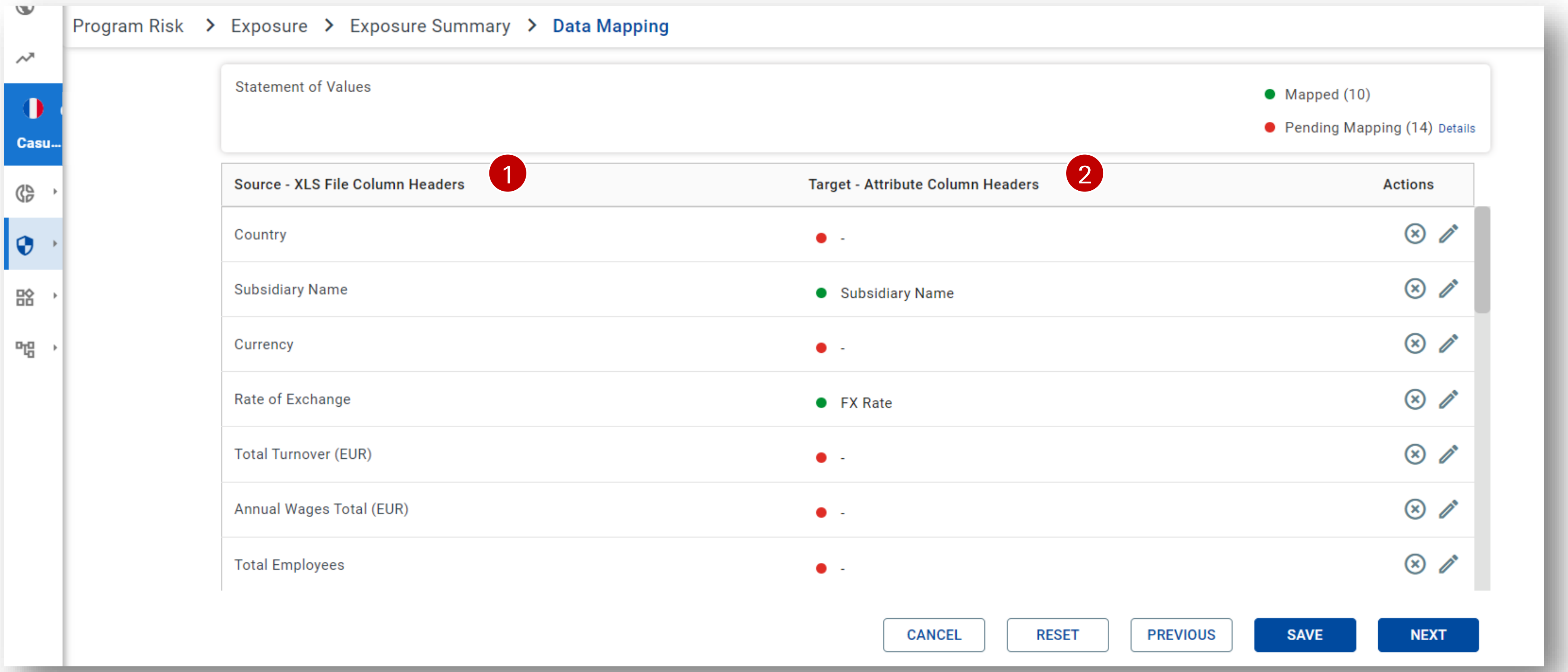
! **N.B.:** For the data to map correctly, the countries/subsidiaries must be filled in the rows and the actual data you want to upload must be in the columns.

Your column headers can differ from the terminology used in this example. It may be in non-English language as well.

The sorting order of columns does not matter.

Only data from 1st worksheet in Excel gets uploaded.

Exposure Upload – Data Mapping

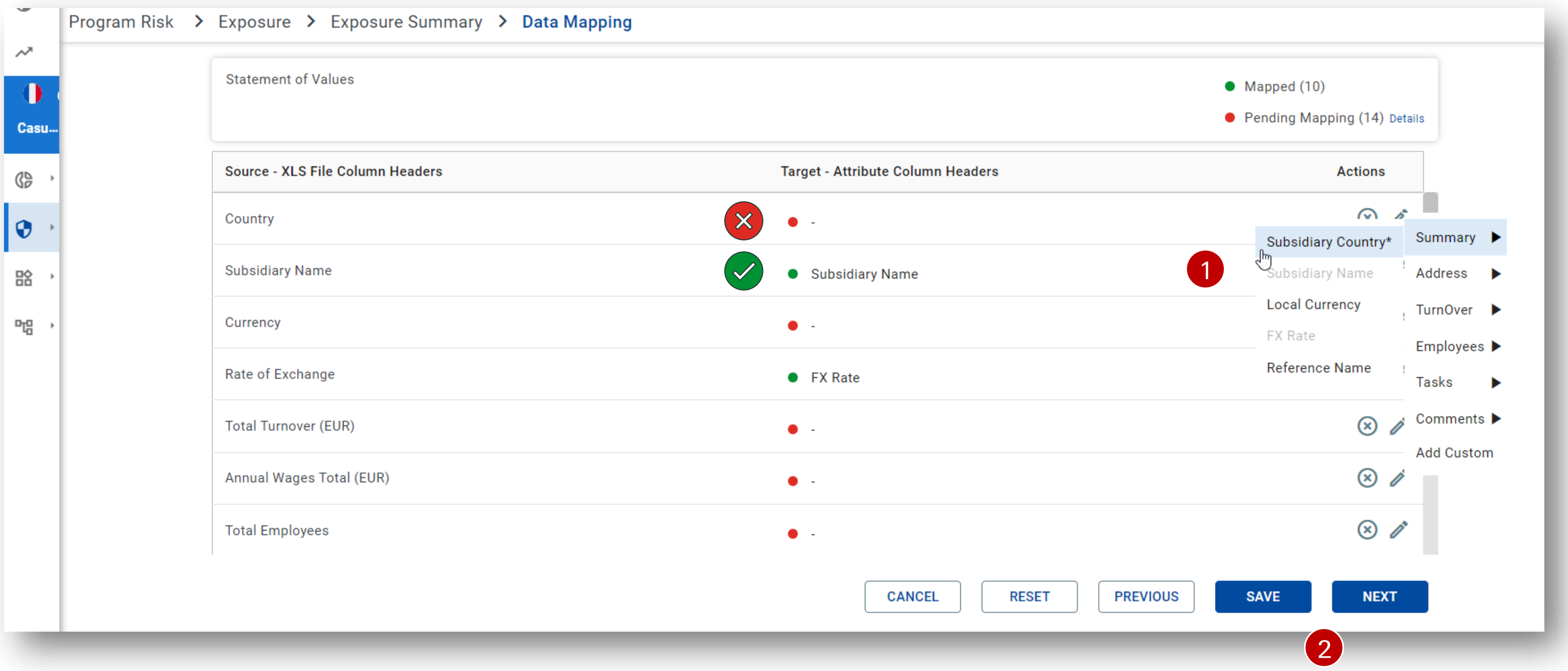


After selecting the Excel file, the user needs to map the attributes – from Excel sheet terminology to PULSE terminology.

1 In the first column, the user finds the Excel Sheet column headers .

2 In the second column, the user finds the PULSE Exposure-related attributes.

Exposure Upload – Data Mapping



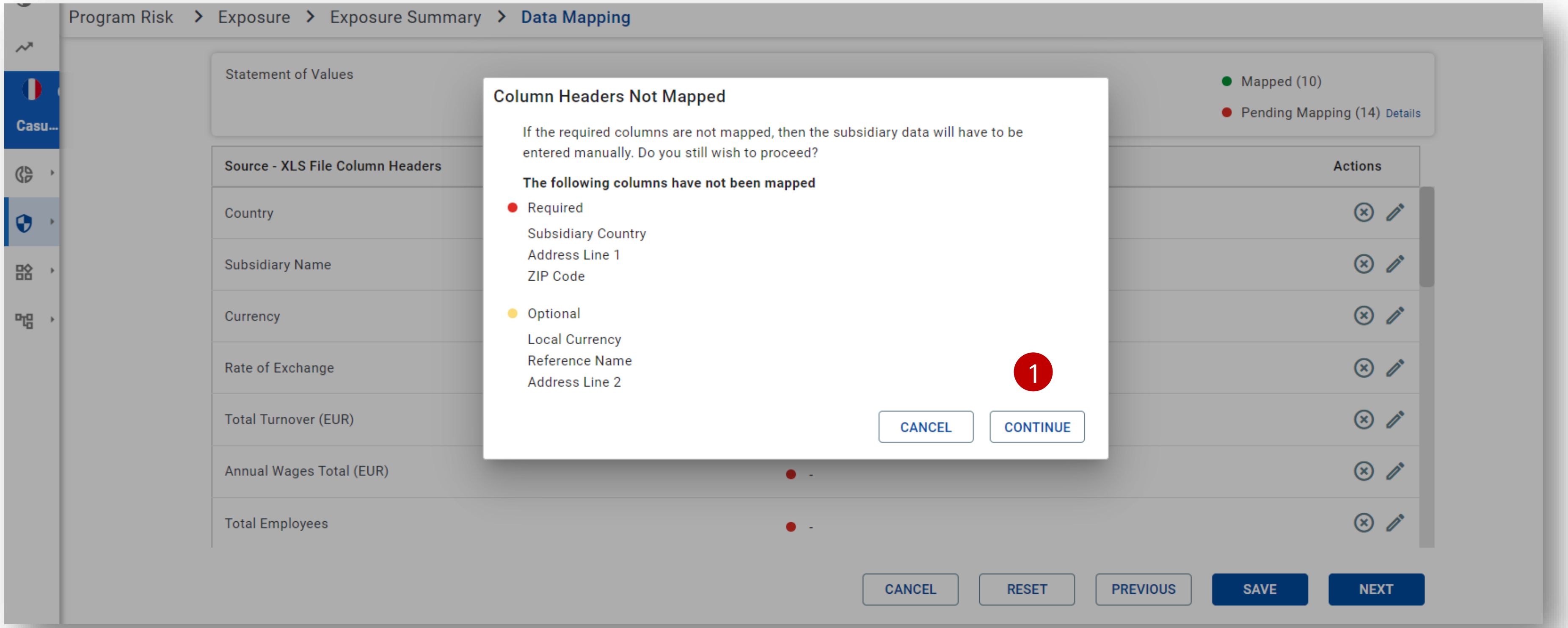
Some data is already automatically identified and mapped.

Some data needs to be manually mapped.

1 Click on the icon and select the respective PULSE attribute.

2 Once the user has mapped all attributes, save and click “Next”.

Exposure Upload – Finish Data Mapping Step

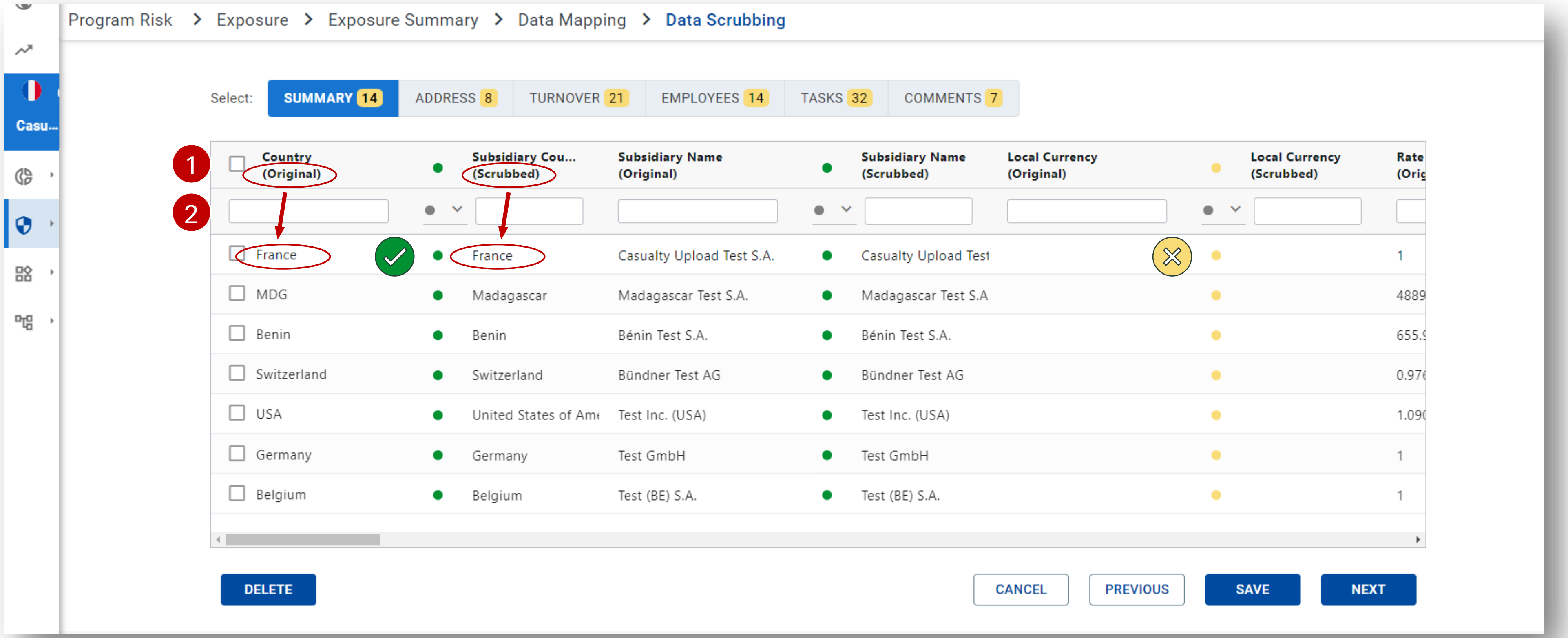


1 After Next, the user may get a "warning pop-up", in case that required or optional PULSE attributes have not been mapped.

Once the user completes the mapping, click "Continue".

! **N.B.:** Optional information can be neglected; it is not mandatory to complete.

Exposure Upload – Data Scrubbing



1 The user now sees the original content of the Excel file and next to it the "scrubbed" values as will be saved into PULSE attributes generated by PULSE.

2 The user can also filter the relevant attribute for easier checking.

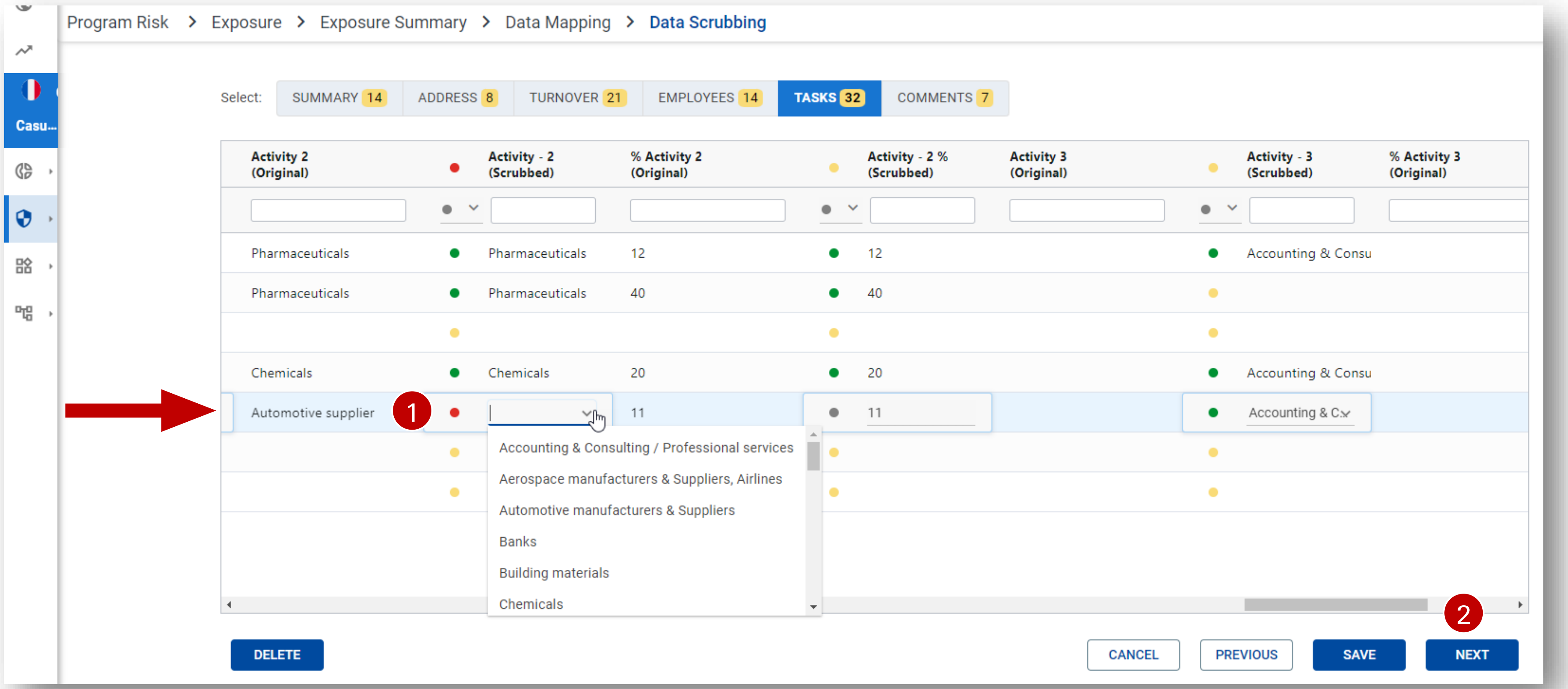
3 Save and click “Next”.

Green dot: value successfully scrubbed.

Yellow dot: unable to fill an optional attribute.

Red dot: unable to scrub a mandatory attribute.

Exposure Upload – Data Scrubbing Results



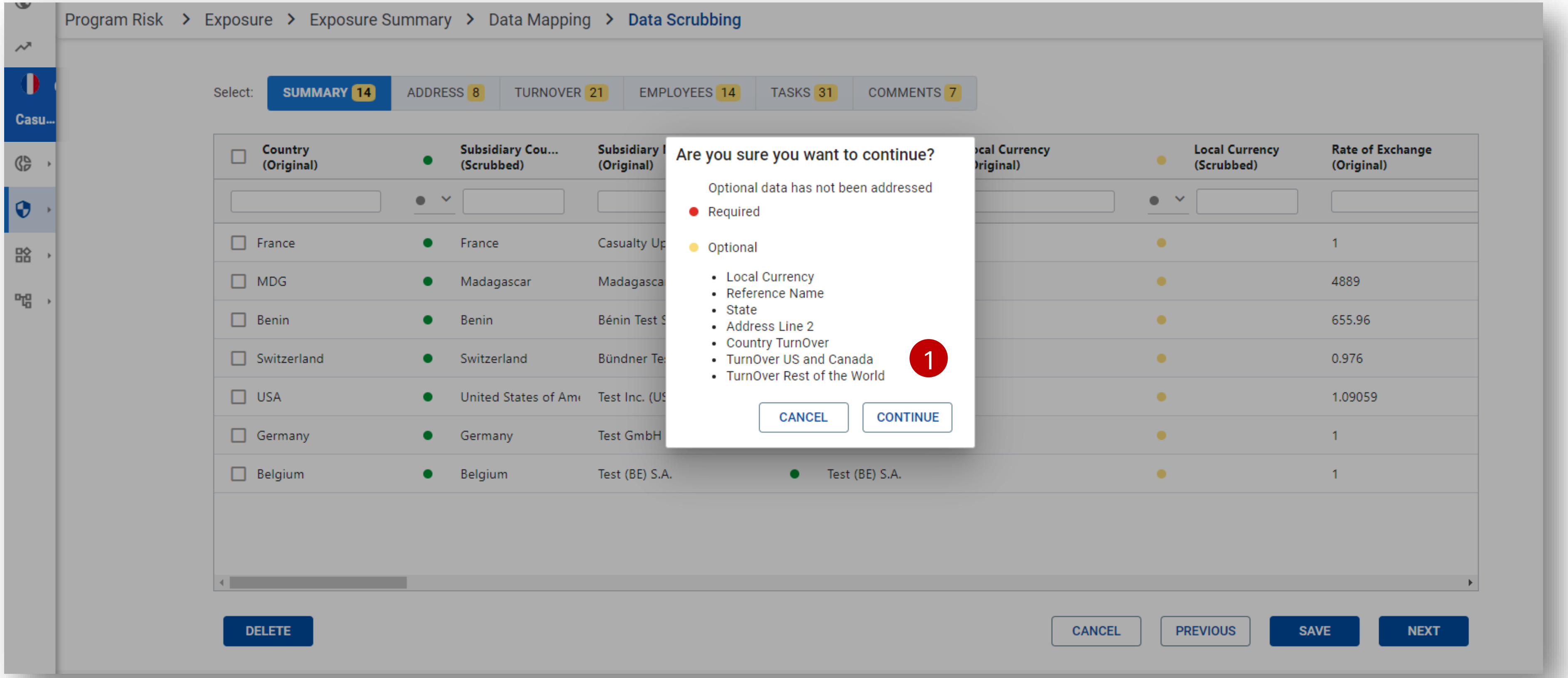
1. In case of a red dot, double click into the cell that you want to modify and enter the missing value or select from dropdown.
2. Save and click “Next”.

Green dot: value successfully scrubbed.

Yellow dot: unable to scrub the optional value.

Red dot: unable to scrub the mandatory value

Exposure Upload – Finish Data Scrubbing Step

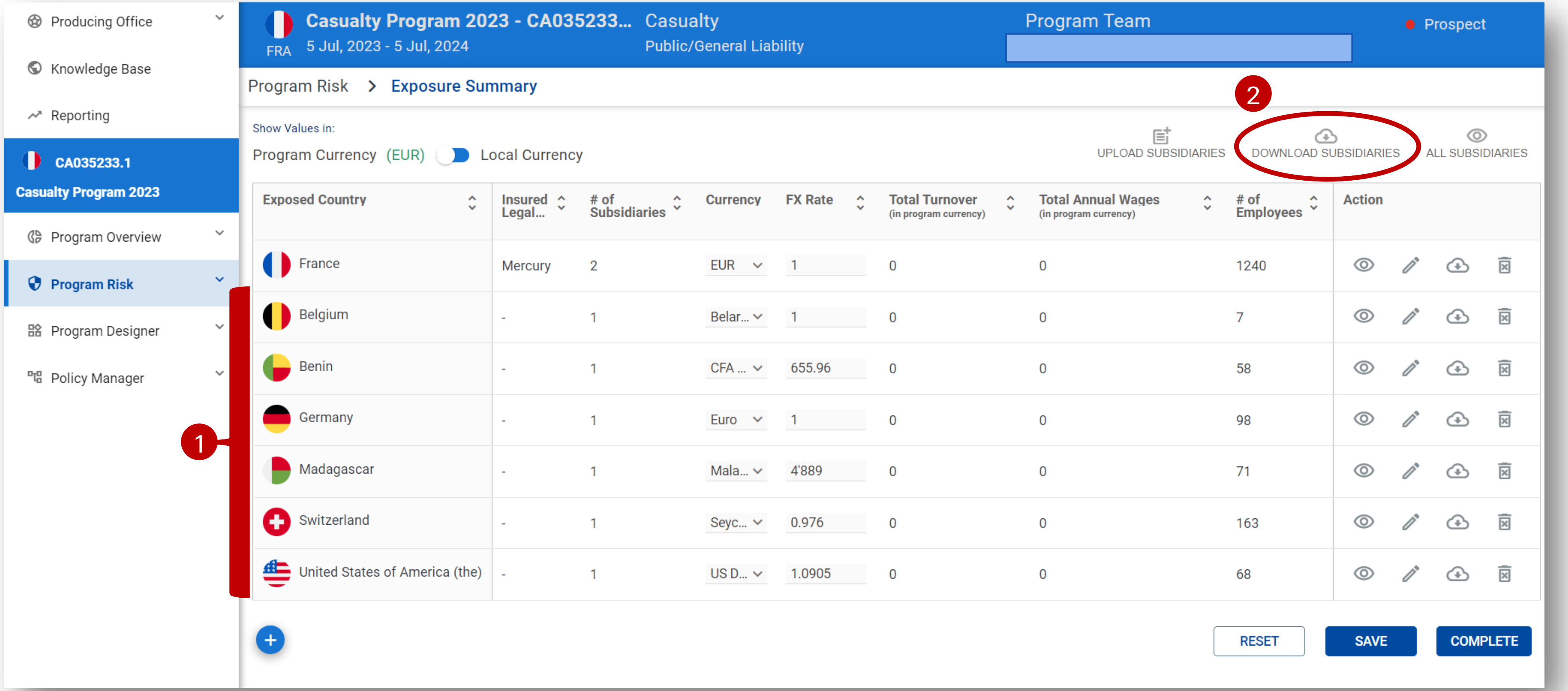


1 The user may get a “warning pop-up”, in case that required or optional information was not provided.

Once the user completes the scrubbing, click “Continue”.

! **N.B.:** Optional information can be neglected; it is not mandatory to complete.

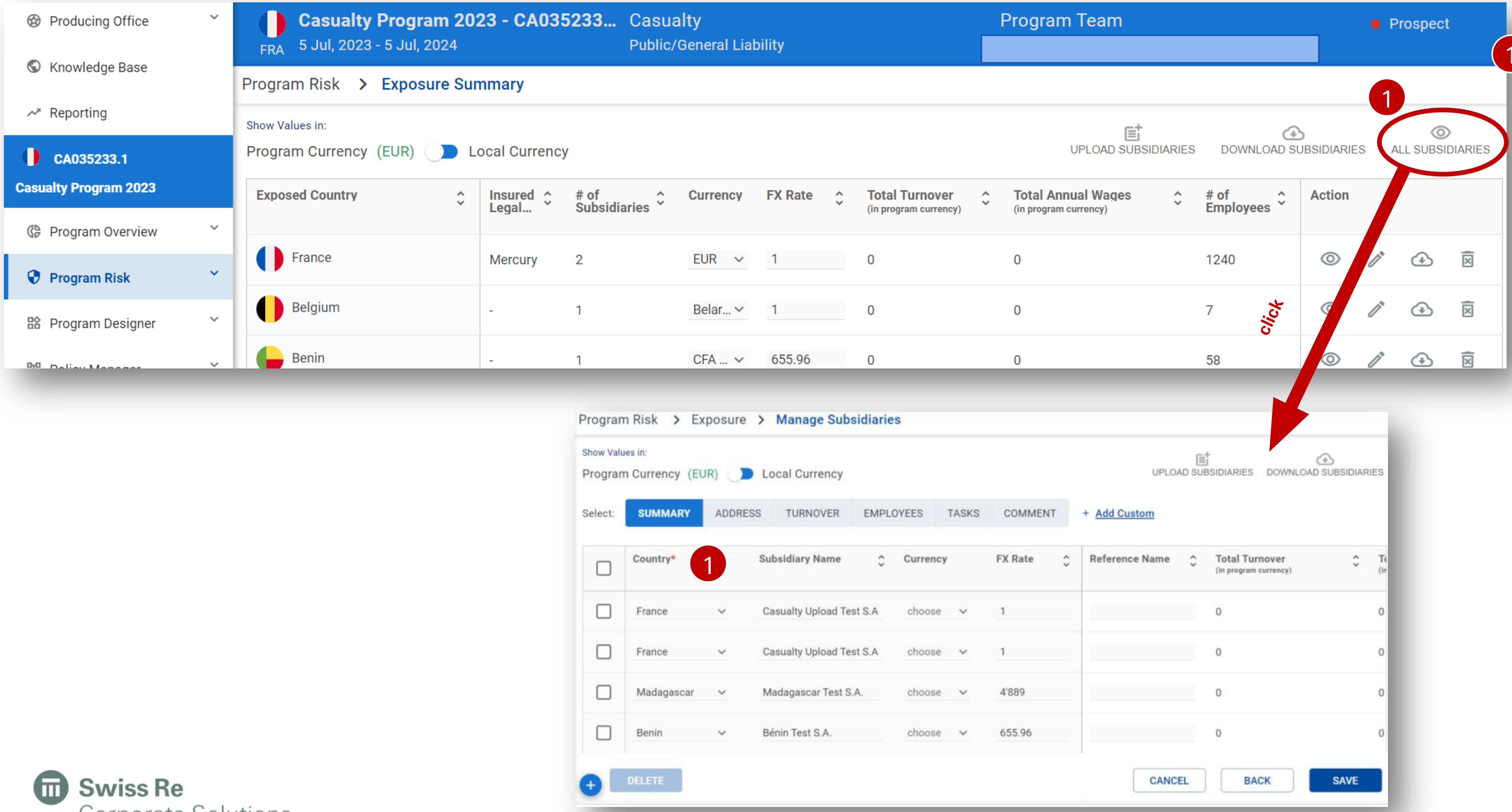
Exposure Upload – Summary



1 The user can now see all exposure data by country – added via Excel sheet.

2 All exposure details can also be downloaded into an Excel sheet by clicking on “Download Subsidiaries”.

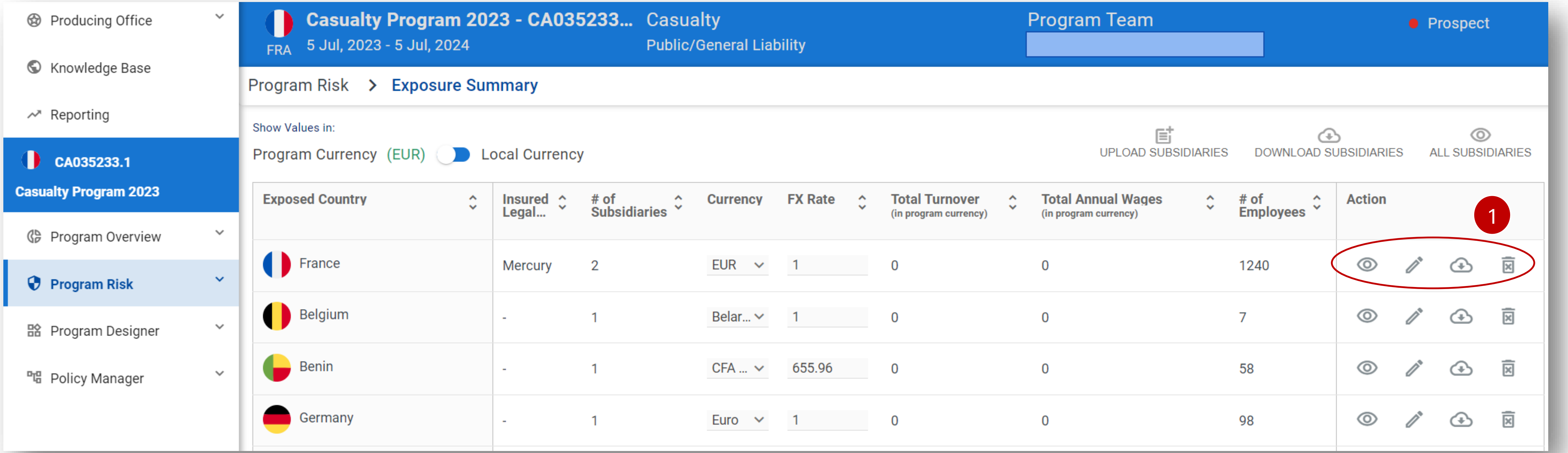
Exposure Upload – All Subsidiaries View



1 On "All Subsidiaries", the user has a holistic overview of all subsidiaries.

The user can check, edit, and add new country rows.

Actions



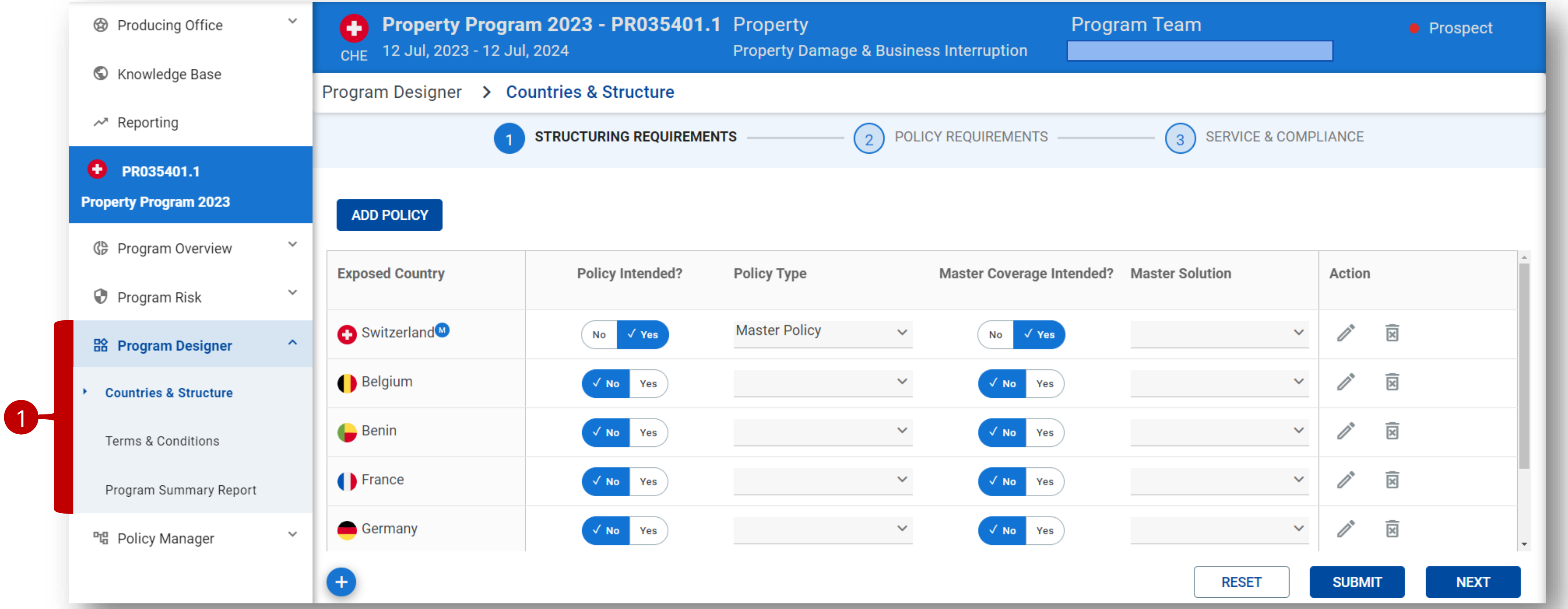
1 For each country row, the user has 4 actions available:

- On **Subsidiaries**, the user can check and edit the Exposure Details.
- On **Country & Insured**, the user can check and edit the Country's & Insured information
- On **Download Group Subsidiaries,** an Excel sheet containing the respective exposed country's locations and information will be generated and downloaded.
- On **Delete**, the country entry will be deleted.

Program Designer

04

Program Designer – Structuring Requirements



1. In the **Program Designer** module, the user can add:
   - Country and Structure data
   - Terms and Conditions
   - Program Summary Report

Program Designer – Countries & Structure

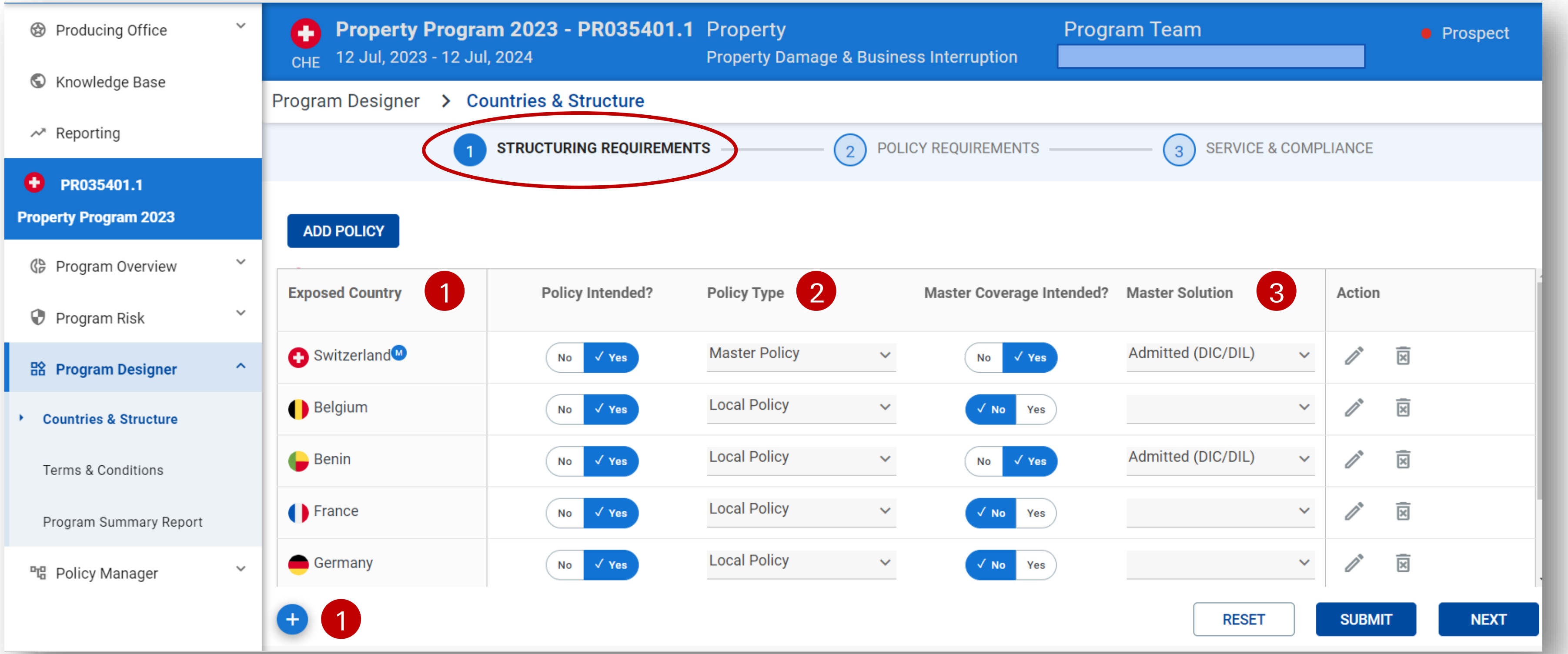
The program's structure can be defined in the Program Designer module.

1 Exposed Countries are already synced from the Exposure Summary (master country first, all other countries in alphabetical order) or can now be added in Structuring Requirements screen.

For each Exposed Country, the coverage requirements and Policy Type can be defined for

2 Local Policies (required or not) **and**

3 any additional coverage provided under the Master Policy

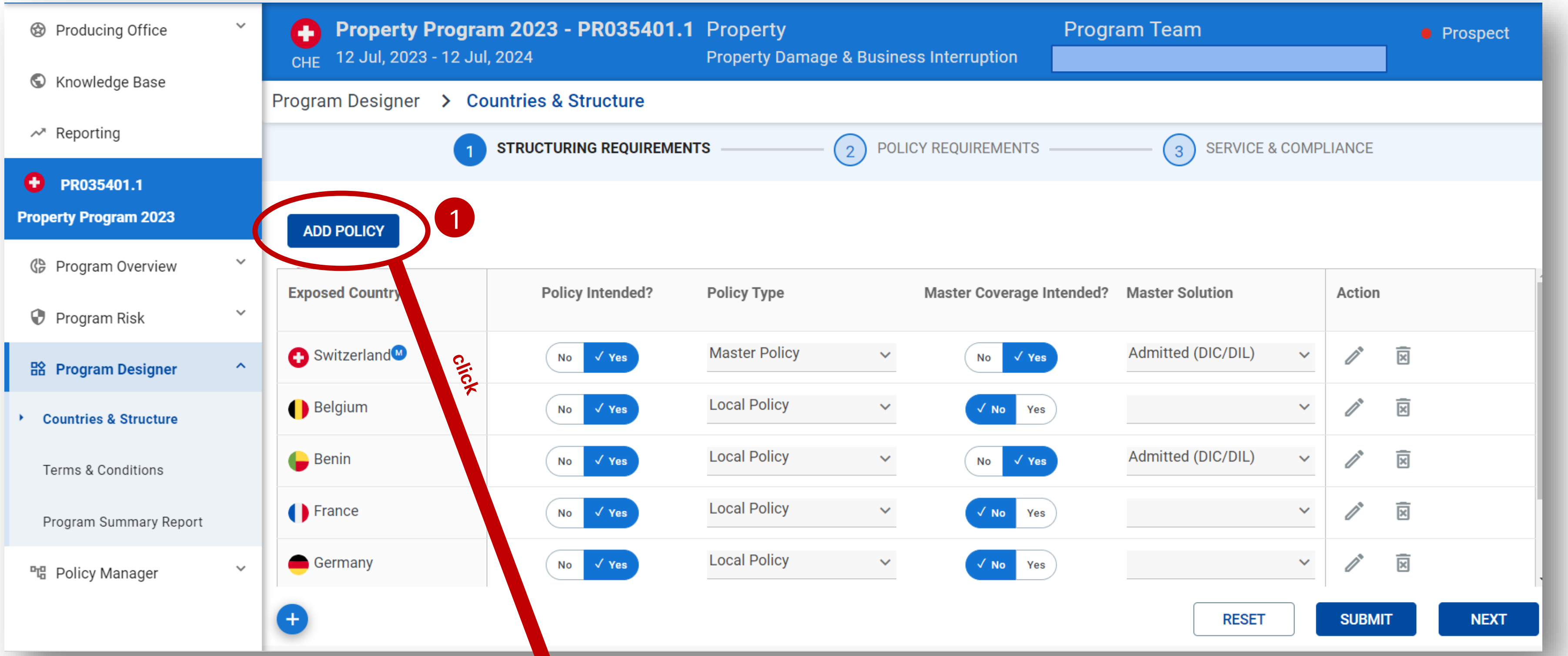


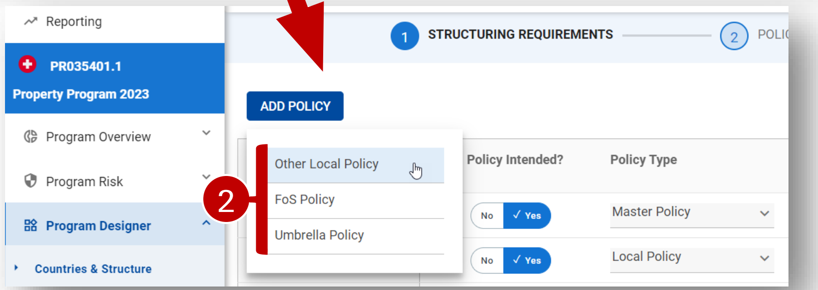
Program Designer – Add New Policy

To add a new policy:

1. Click on “Add Policy”
2. Choose between the three options:

- **Other Local Policy**
- **FoS Policy**
- **Umbrella Policy**

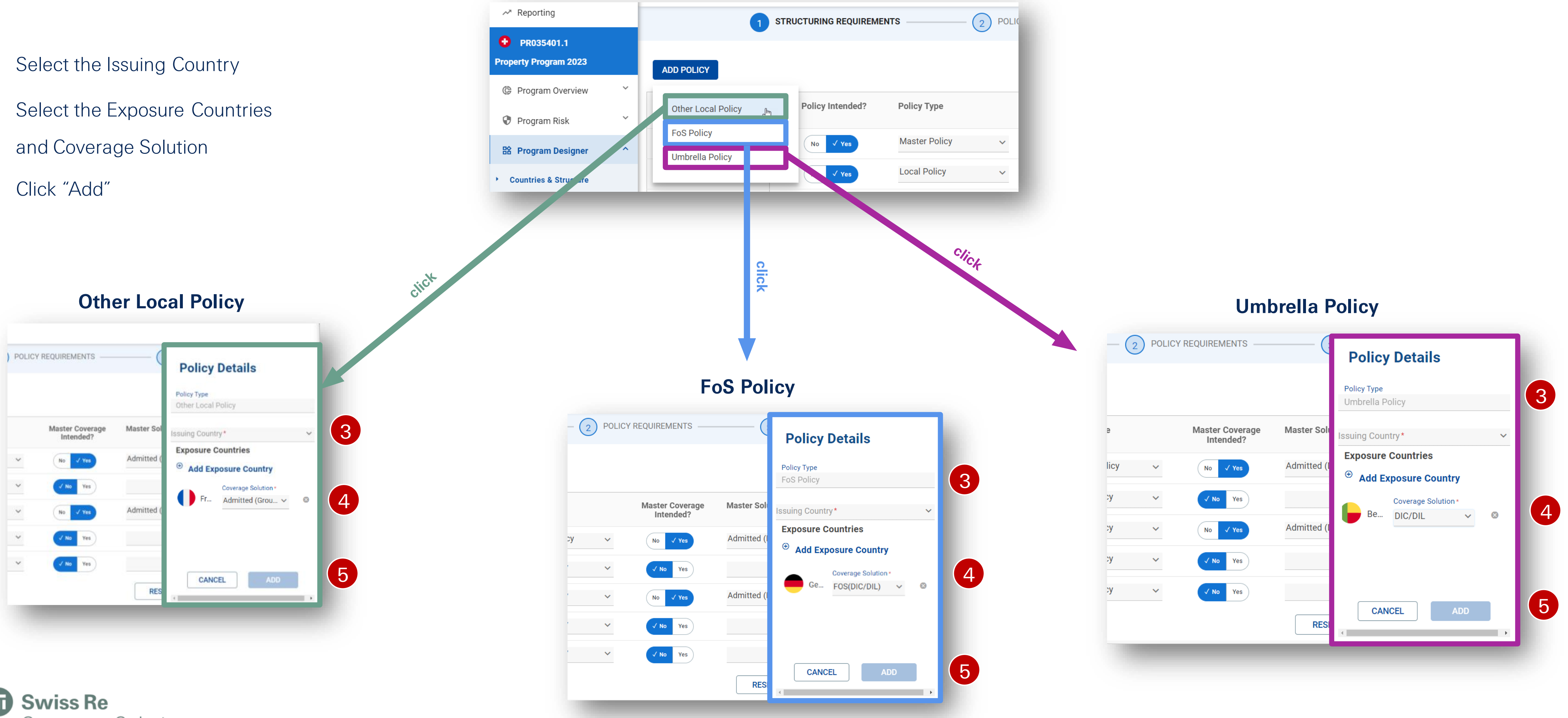




next step on next slide

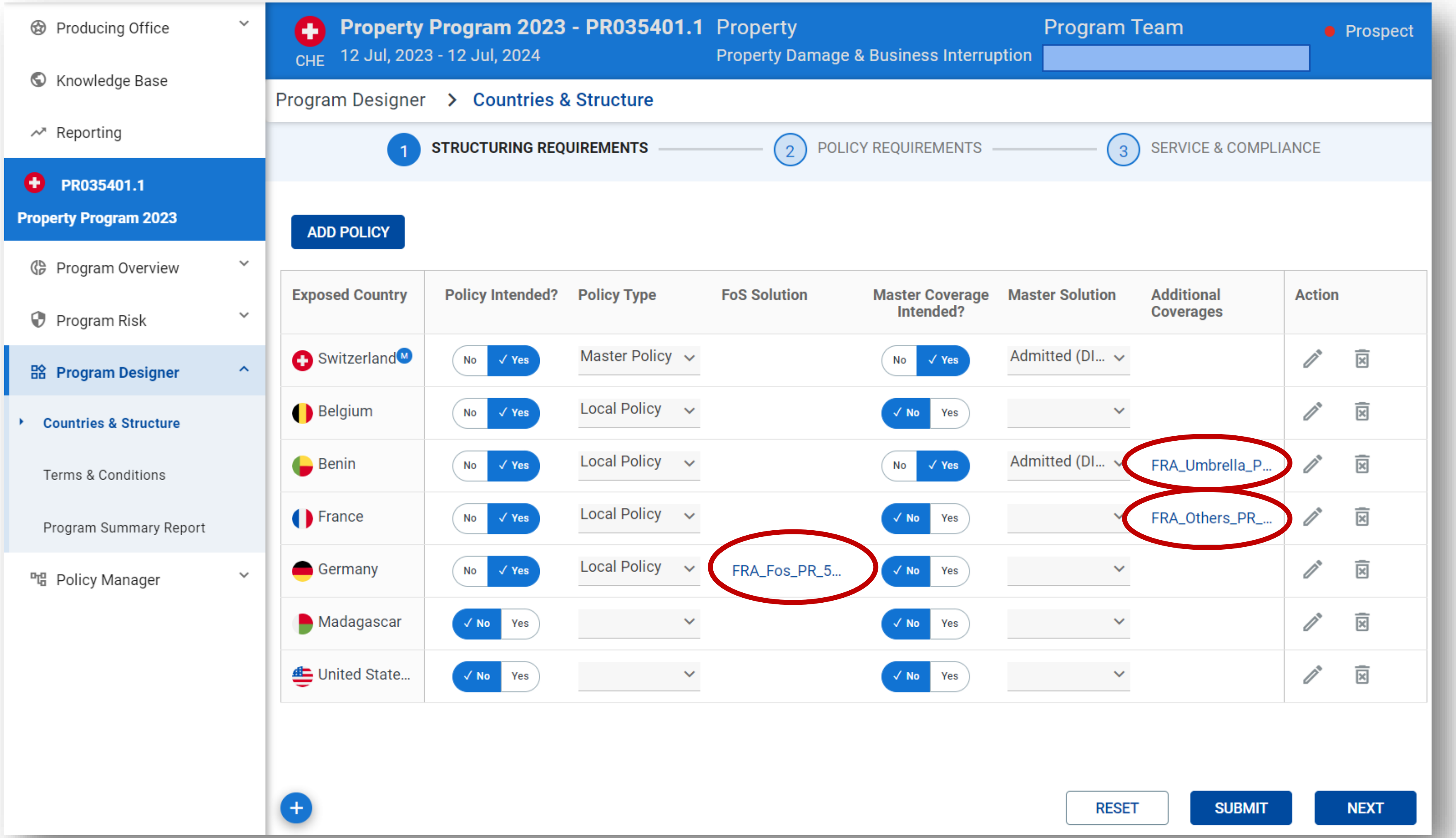
Program Designer – Add New Policy

3. Select the Issuing Country
4. Select the Exposure Countries and Coverage Solution
5. Click "Add"



Program Designer – Add New Policy

The user can now see all three added policies



Program Designer – Policy Requirements

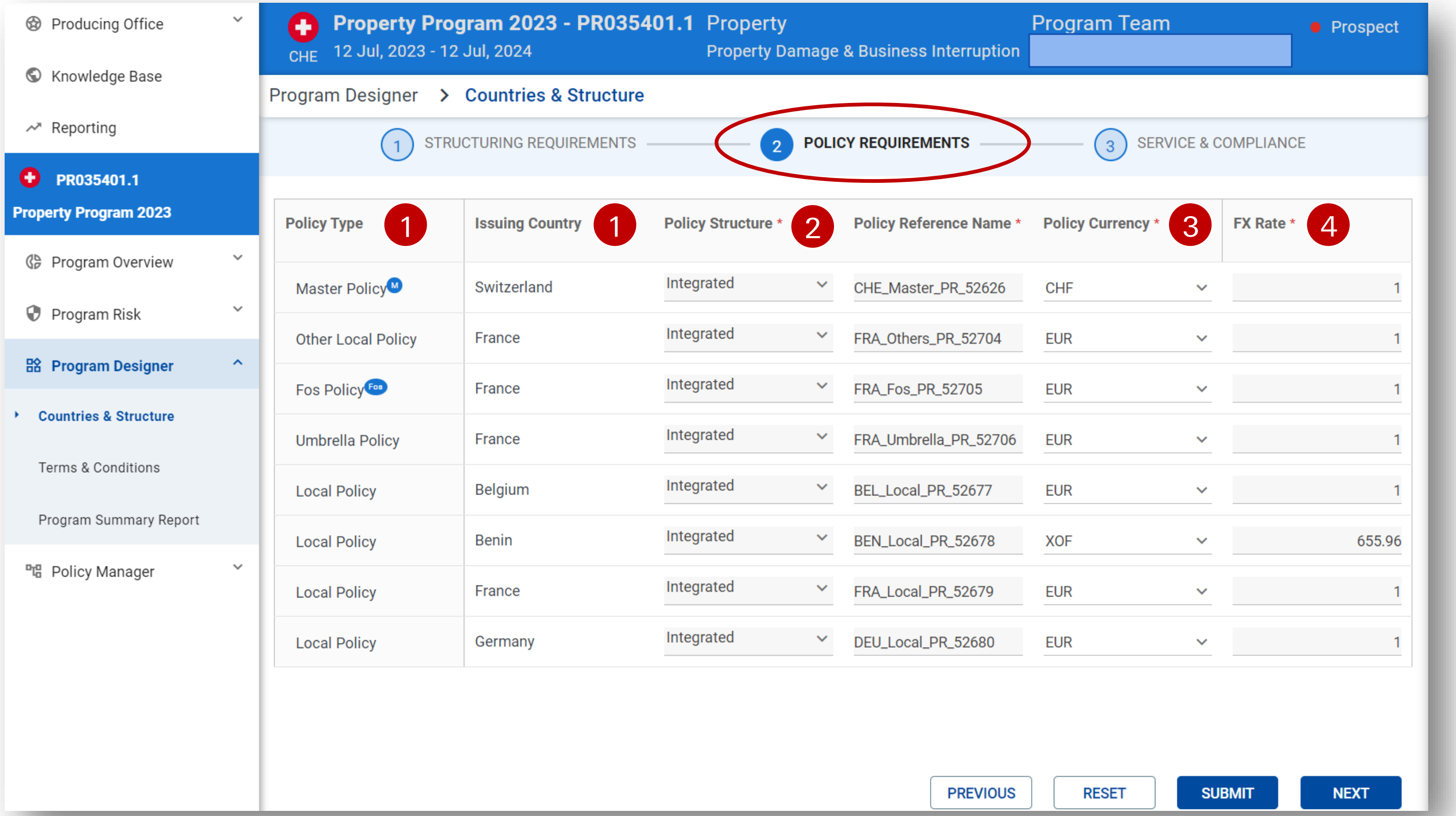
Once the structuring requirements been submitted, user can define in 2nd step further policy requirements.

1 By policy type and issuing country, user must add:

2 the policy structure (integrated in the program or not),

3 the policy's currency (be default, PULSE assumes it's the country's local currency) and

4 the Foreign Exchange rate of policy currency relative to Program currency.



Program Designer – Service & Compliance

In 3rd step (Service & Compliance), the user will be notified if an Action is required pre-quote or pre-bind,

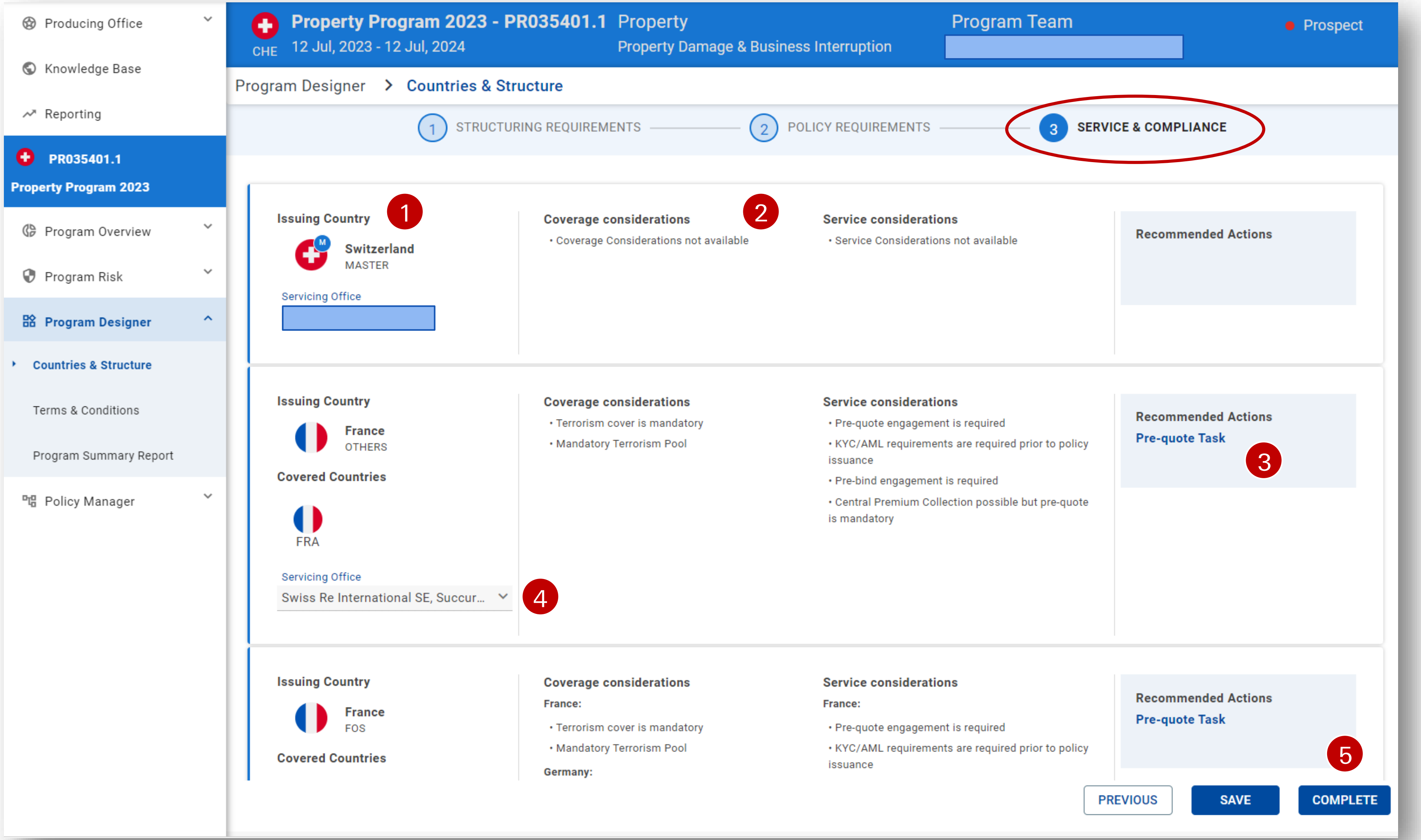
1 Policies are synced from the Structuring Requirements

2 Coverage and Service Considerations are retrieved from the Knowledge Base (further details [here](#)).

3 Based on the Exposed Country Recommended Actions are indicated and can be kicked off directly from this screen.

4 Servicing Office Network can be chosen.

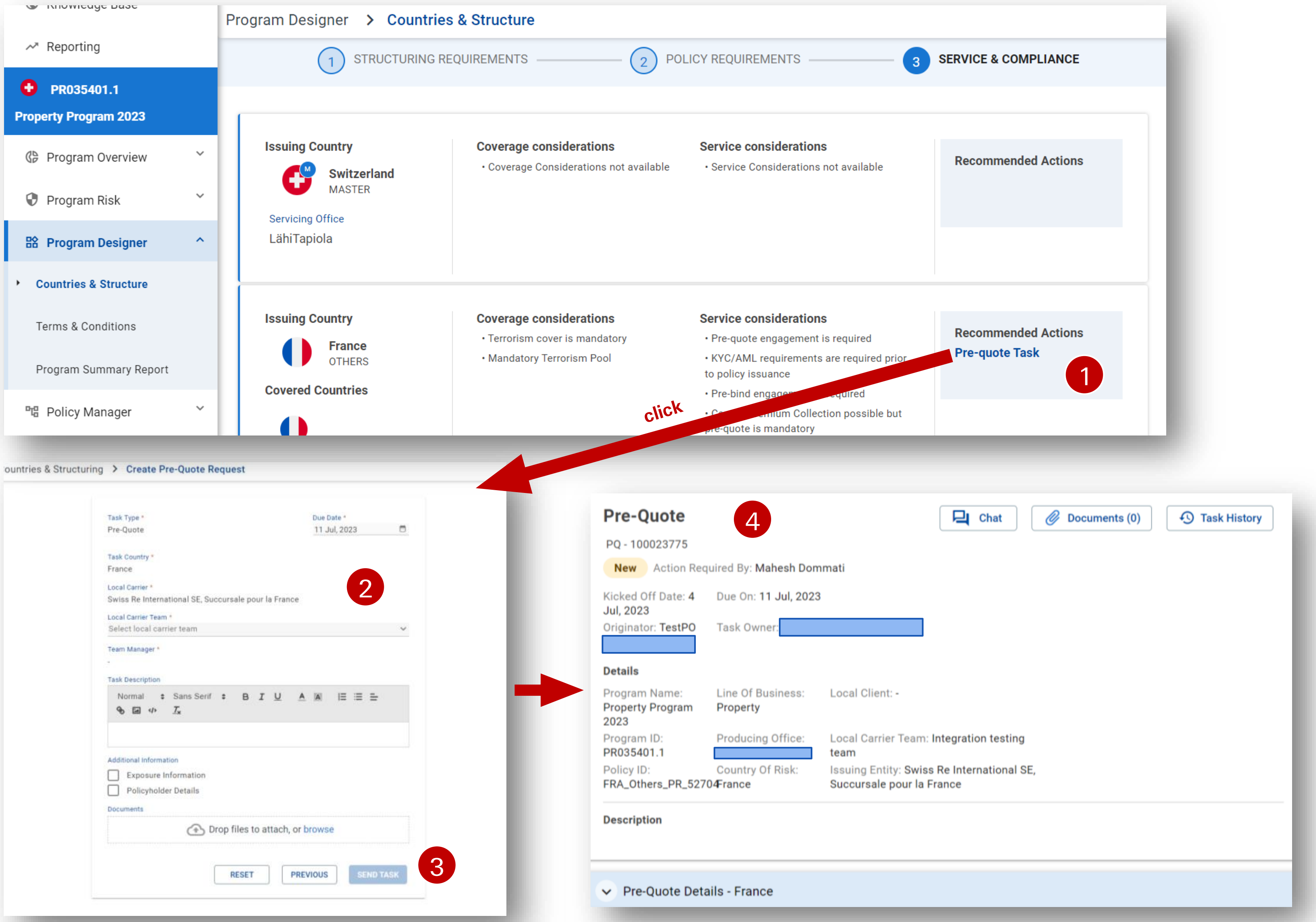
5 Once you have completed all information, click on "Complete"



Program Designer – Pre-Quote Request

To create a pre-quote request:

1. Click on “Pre-quote Task”
2. Complete the relevant information.
3. Click on “Send Task”
4. The user will get an overview of the pre-quote task request



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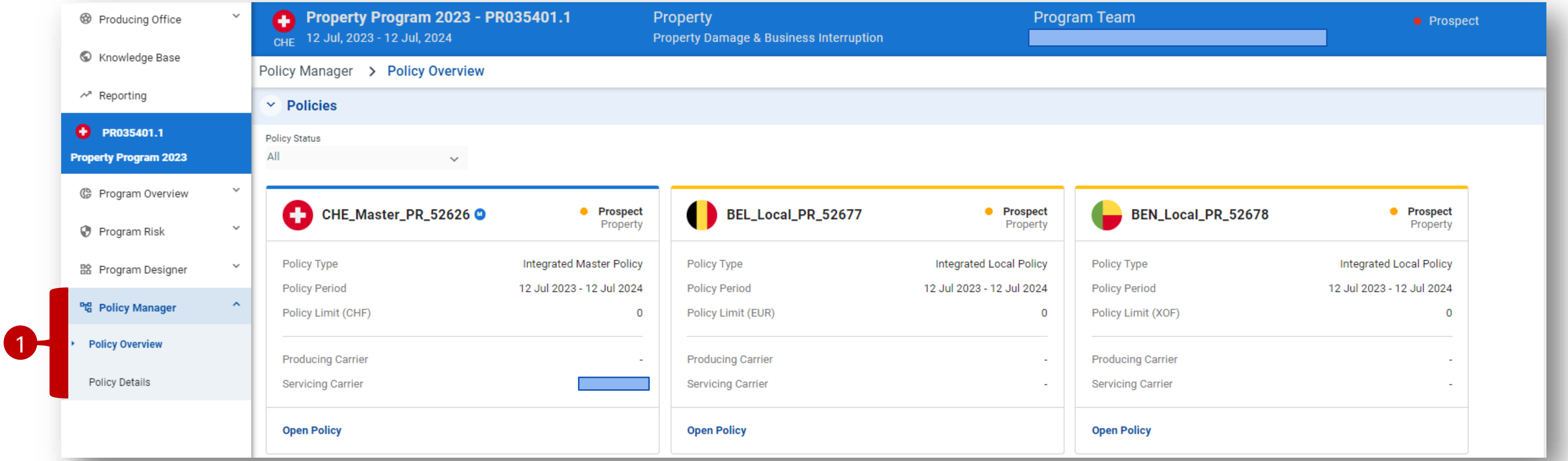
Corporate Solutions

Policy Manager

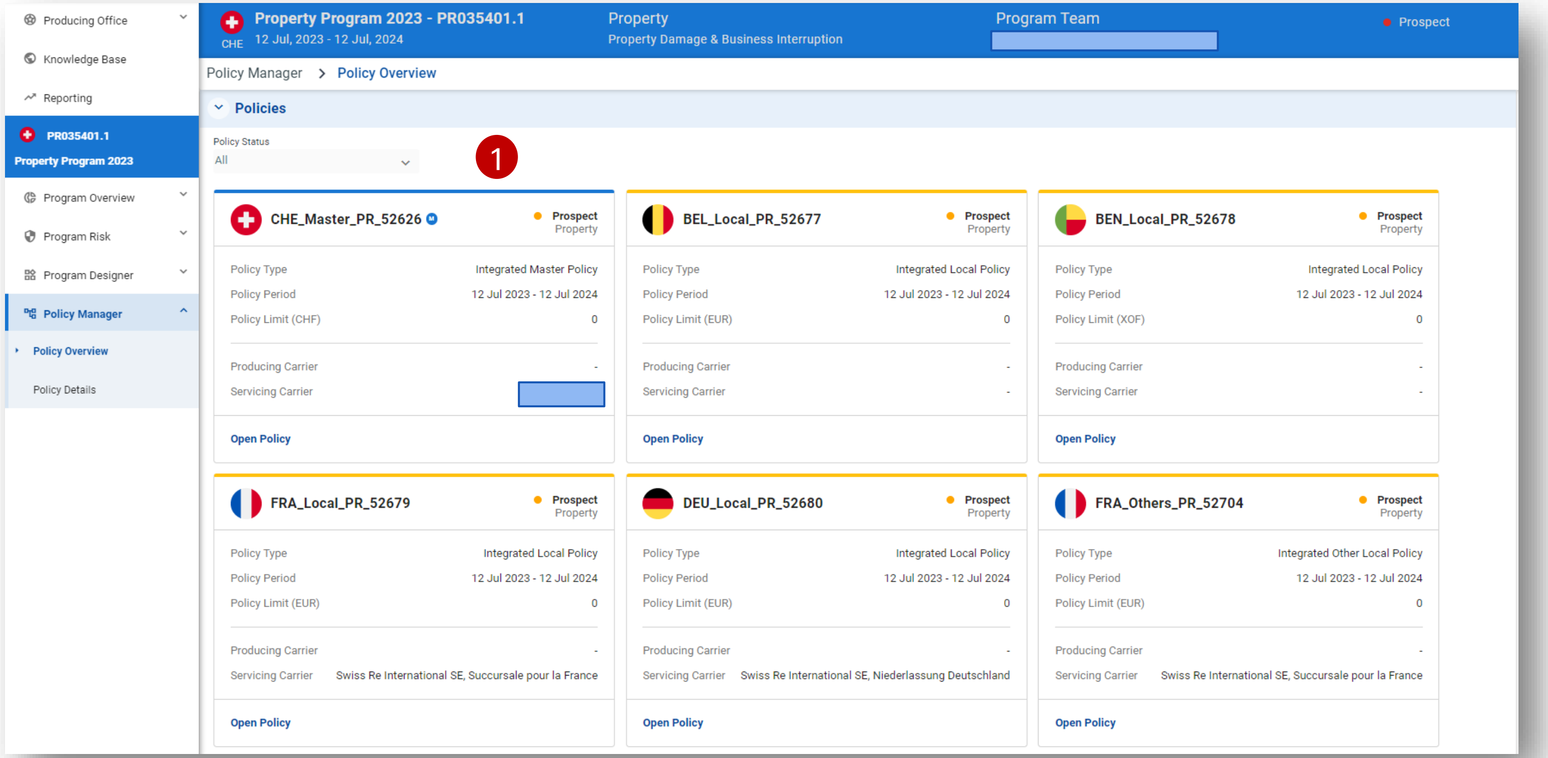
05

Program Exposure and Risk Information – Casualty



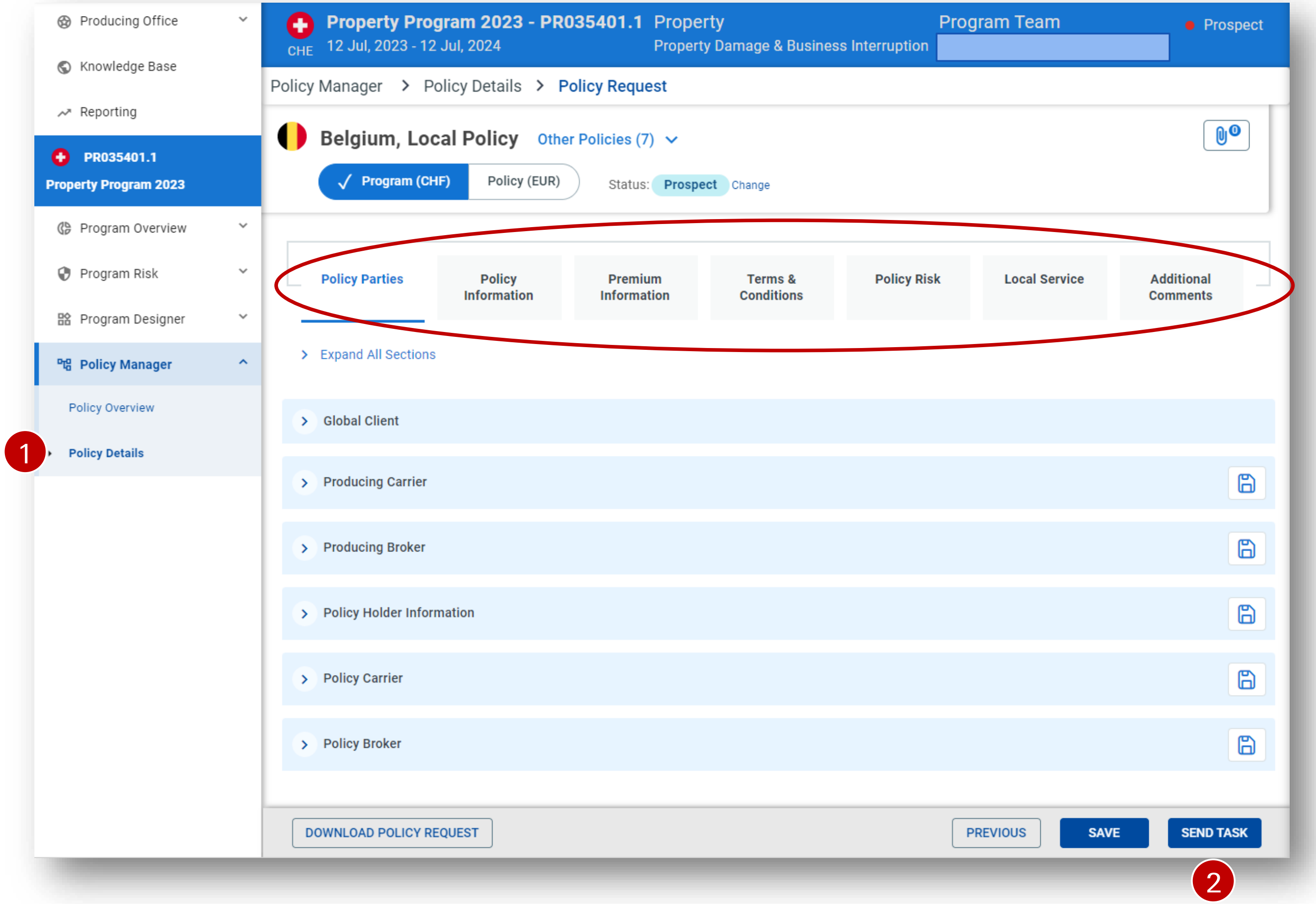
1. In the **Program Manager** module, the user can add:
   - Policy Overview
   - Policy Details

Policy Manager – Overview of all Policies (Master, Local, FoS)



1 The defined local policies are filtered and synched in the Policy Manager – including all details entered in the system earlier for this specific policy, as for example exposure data or country specific business descriptions. In addition, account or program relevant data such as Head Quarter Country or Global Client contact are populated as well.

Policy Manager – Send Policy Review Task

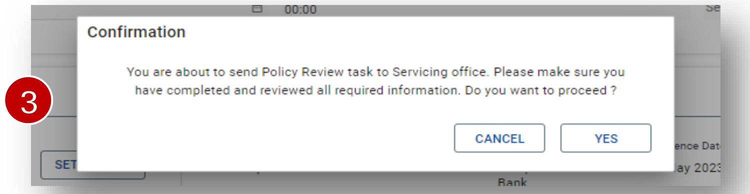


1 The user can enter all local policy details in Policy Details:

1. Policy Party
2. Policy Information
3. Premium Information
4. Terms & Conditions
5. Policy Risk
6. Local Services
7. Additional Comments

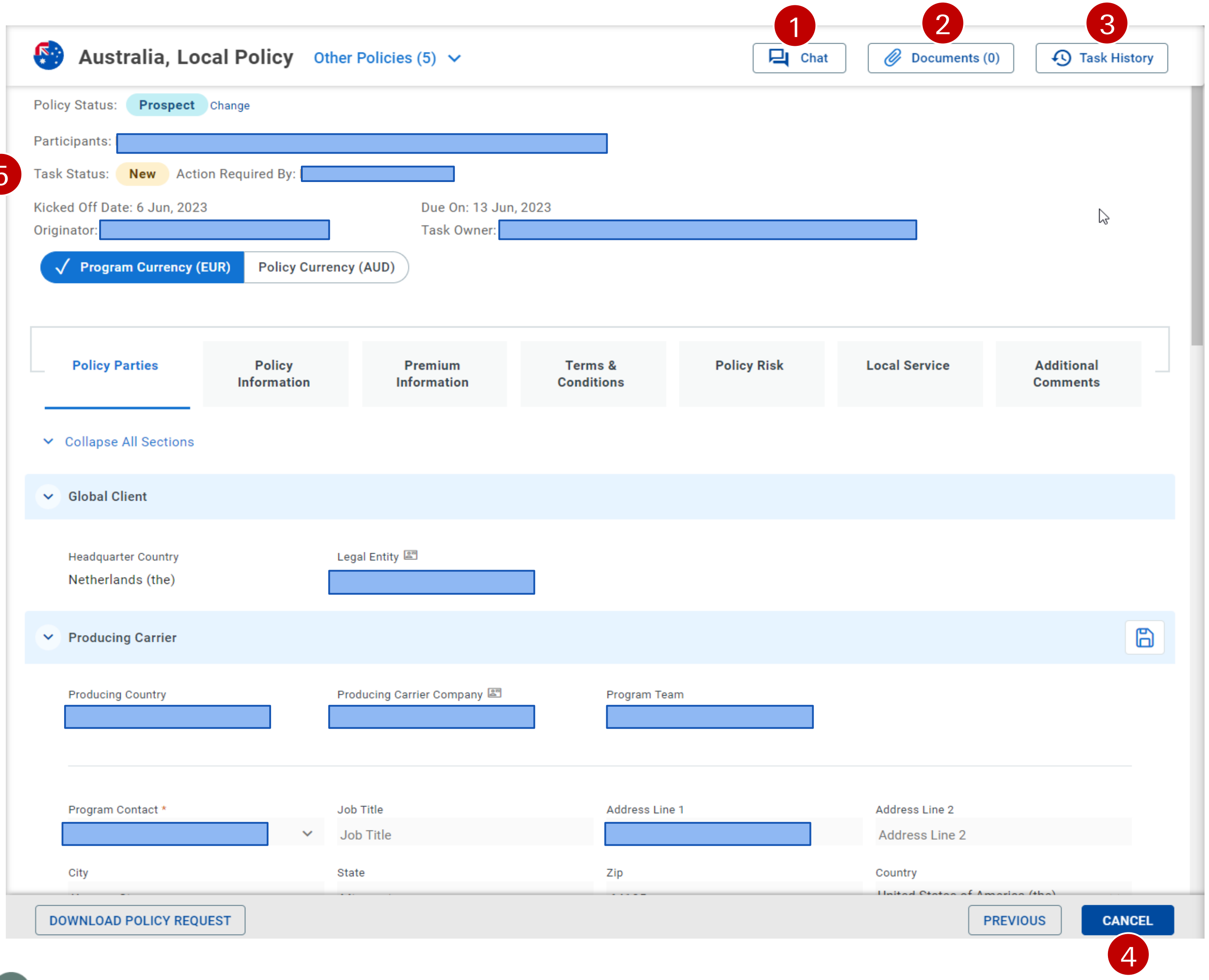
2 Once finished, the Producing Office user can send all details to the Servicing Office by clicking on “Send Policy Task”.

3 After sending the Policy Task, a confirmation popup will appear.



Make sure to always save before you leave the screen or generate a document

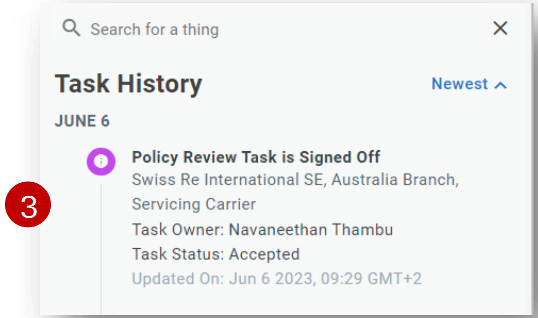
Policy Manager – Policy Review Request



Once the Policy task is sent, the policy details are shared with the assigned servicing office.

The Producing Office can

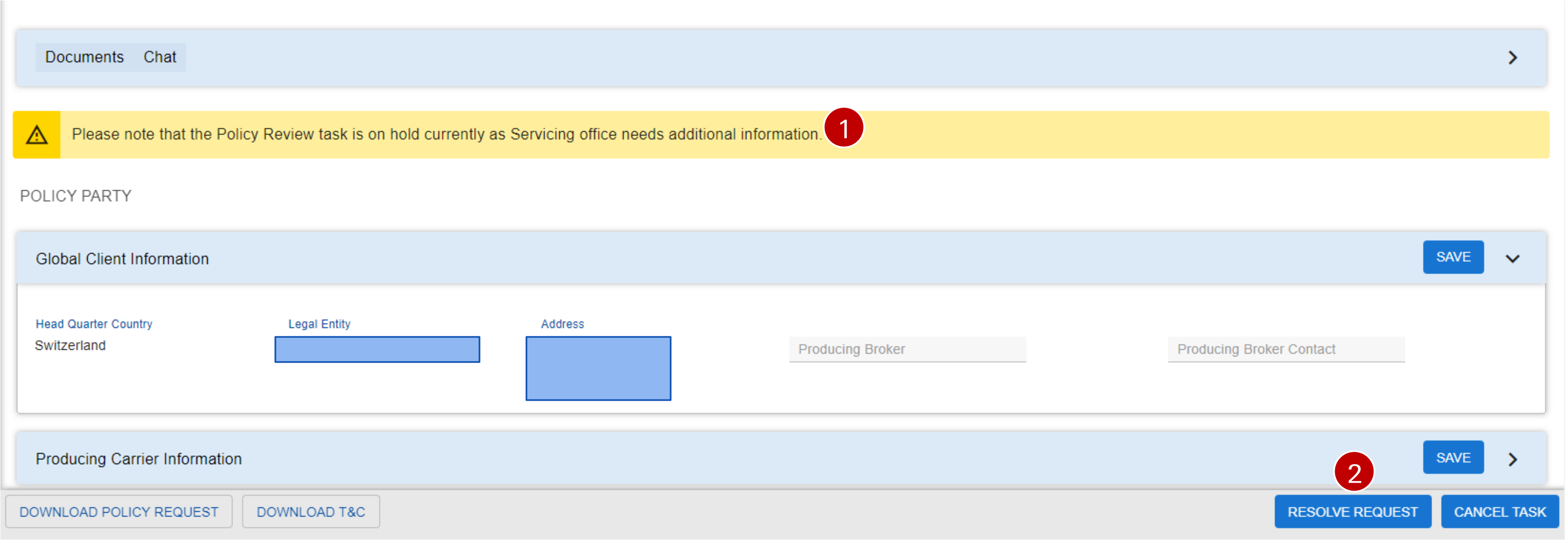
1. Communicate via the chat,
2. Upload documents or
3. See task history.



The Servicing Office cannot edit the policy information and will communicate changes via the chat.

4. As long as the task is not accepted, the Producing Office can cancel the policy.
5. In this case the Producing Carrier will see the task status as “New”.

Policy Manager – Policy Workflow 1

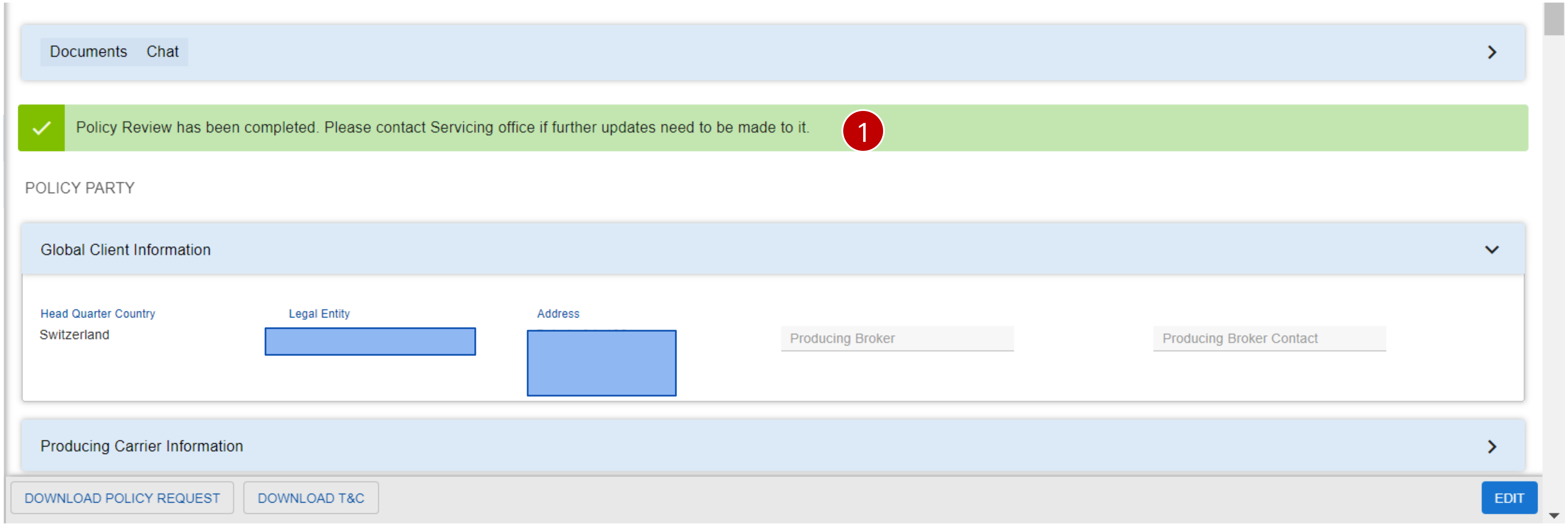


The Servicing Carrier will review the request and will ask for changes or additional information via the application if applicable.

In this case, the Servicing Carrier will set the task on hold and the Producing Carrier will receive an email and will see a warning message on the screen. 1

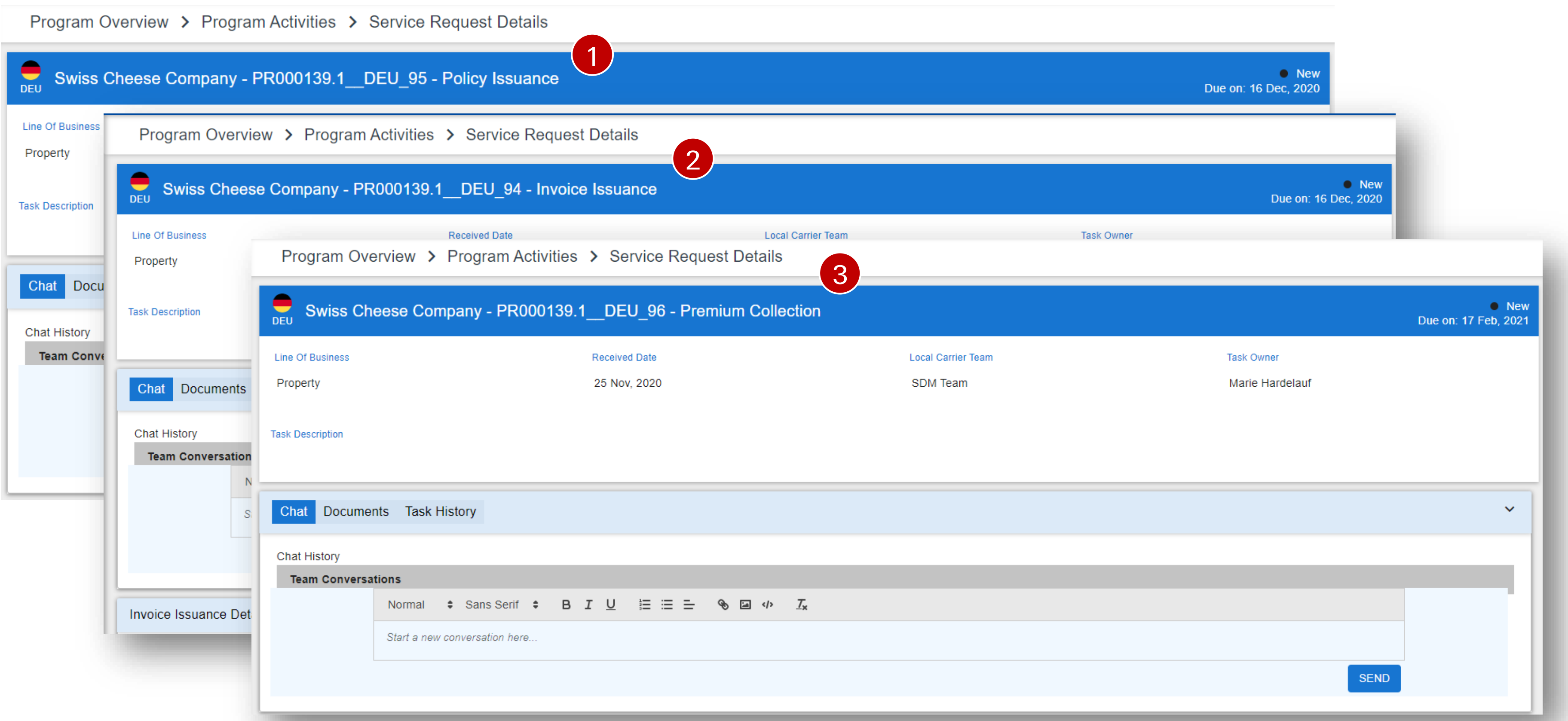
The Producing Carrier is now asked to enter new data or change existing information. After this the Producing Carrier can indicate that information is provided by clicking on "Resolve Request". 2

Policy Manager – Policy Workflow 2



If the information provided are sufficient and they are accepting the policy instruction, the PO will receive a notification via Email and on the Screen. 1

Policy Manager – Policy Tasks



The acceptance of the Servicing Carrier automatically kicks-off the Issuance Process and triggers three new tasks:

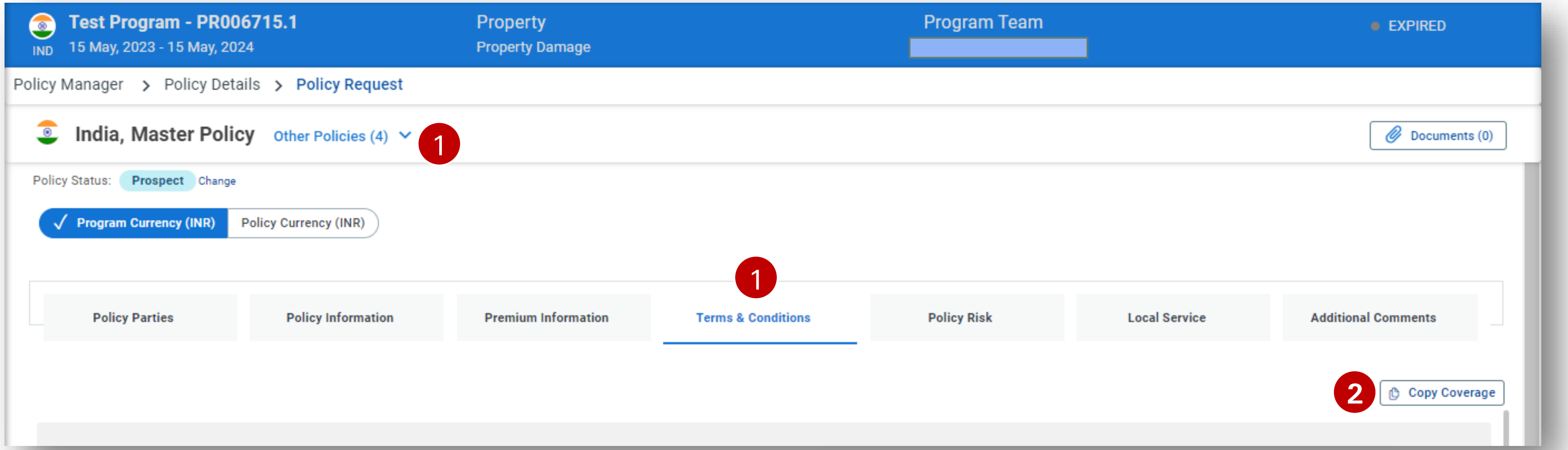
1. Policy Issuance
2. Invoice Issuance
3. Premium Collection

The PO Owner will get a notification on the task creation via Email.

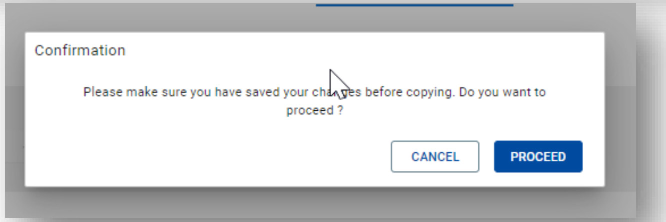
Copy Terms & Conditions

06

Terms & Conditions Copy



3

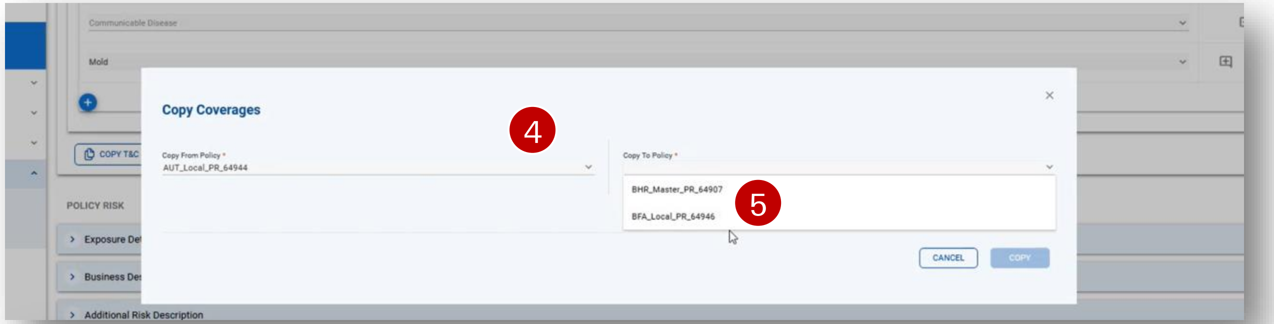


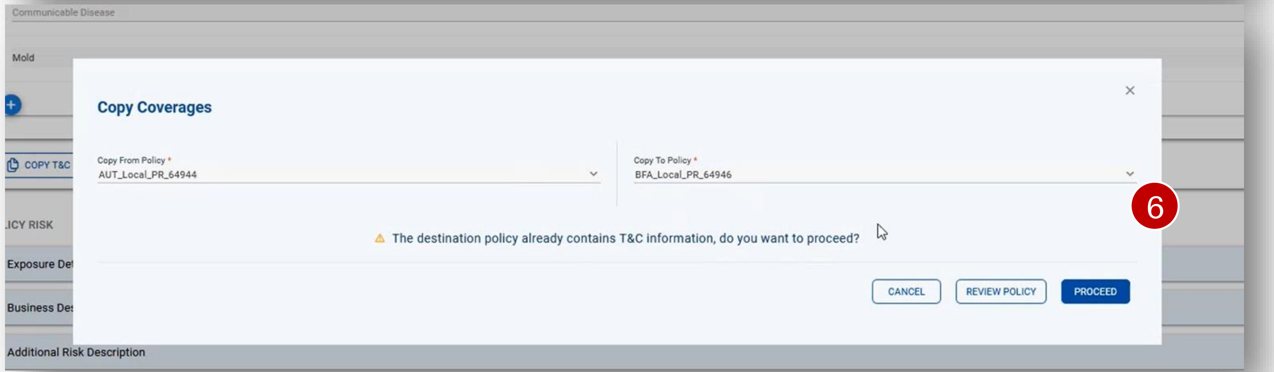
1 Open the policy that you would like to copy from. Go to its Terms & conditions section.

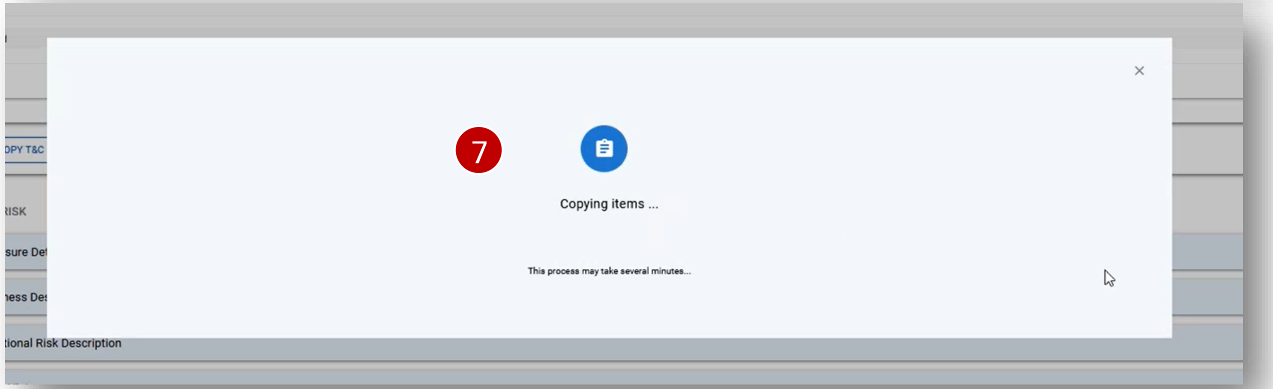
2 Once you have completed the T&C data for the policy, you can use the «Copy Coverage» button.

3 After clicking, system will remind you to save all latest changes before proceeding.

Terms & Conditions Copy







4 Select to which policy you want to paste the Terms & Conditions values from your opened policy.

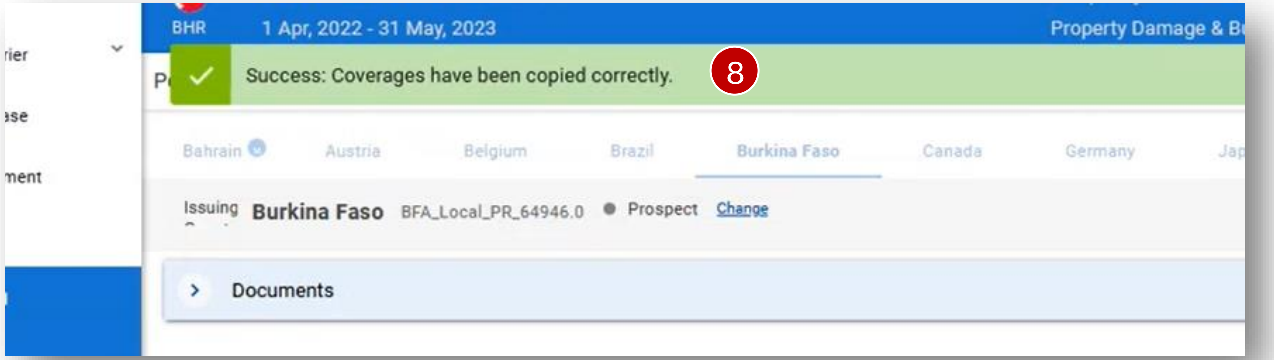
5 You will only see policies within same program which have the same wording type (i.e. Good local standard or OneForm).

6 If the destination policy already contains some T&C data, you will be warned. If you click on proceed, the former values will be overwritten.

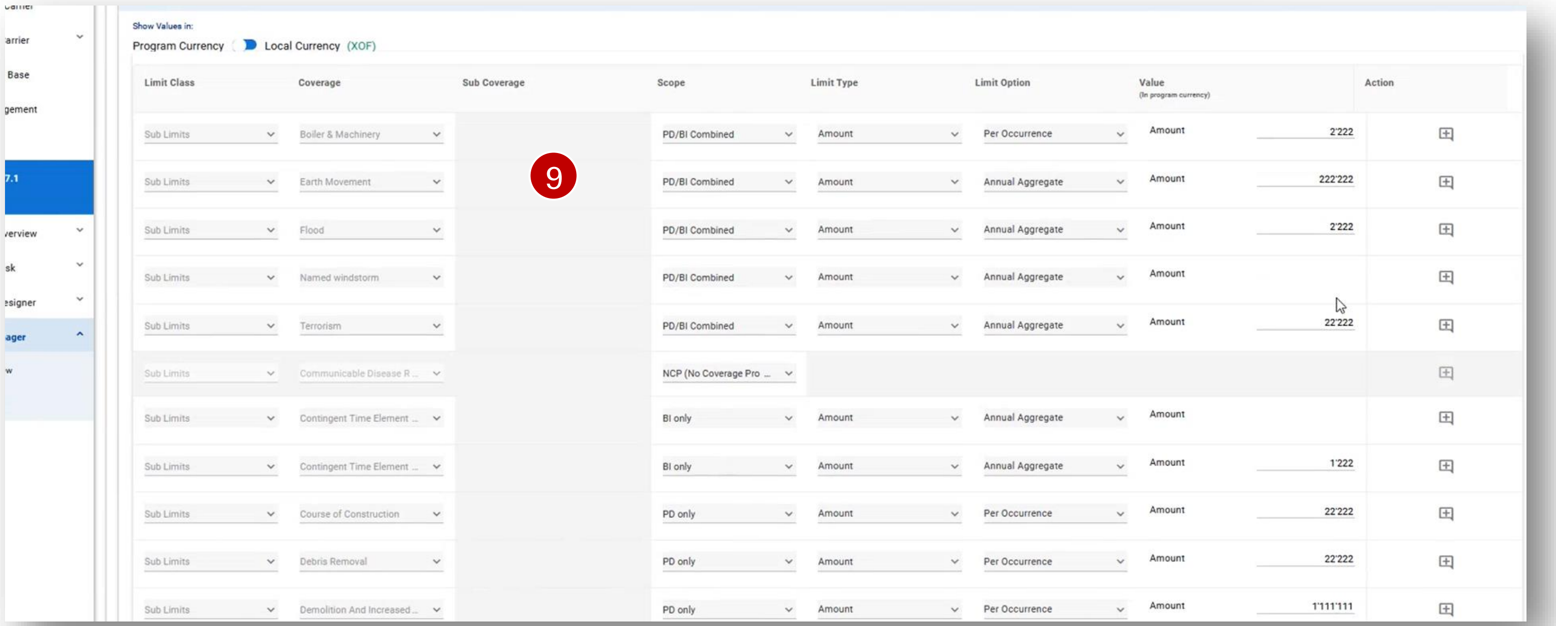
7 Your T&C is being copied…

Terms & Conditions Copy

8 Confirmation that your T&C has been transferred successfully! All limit/ deductible amounts are copied in program currency.



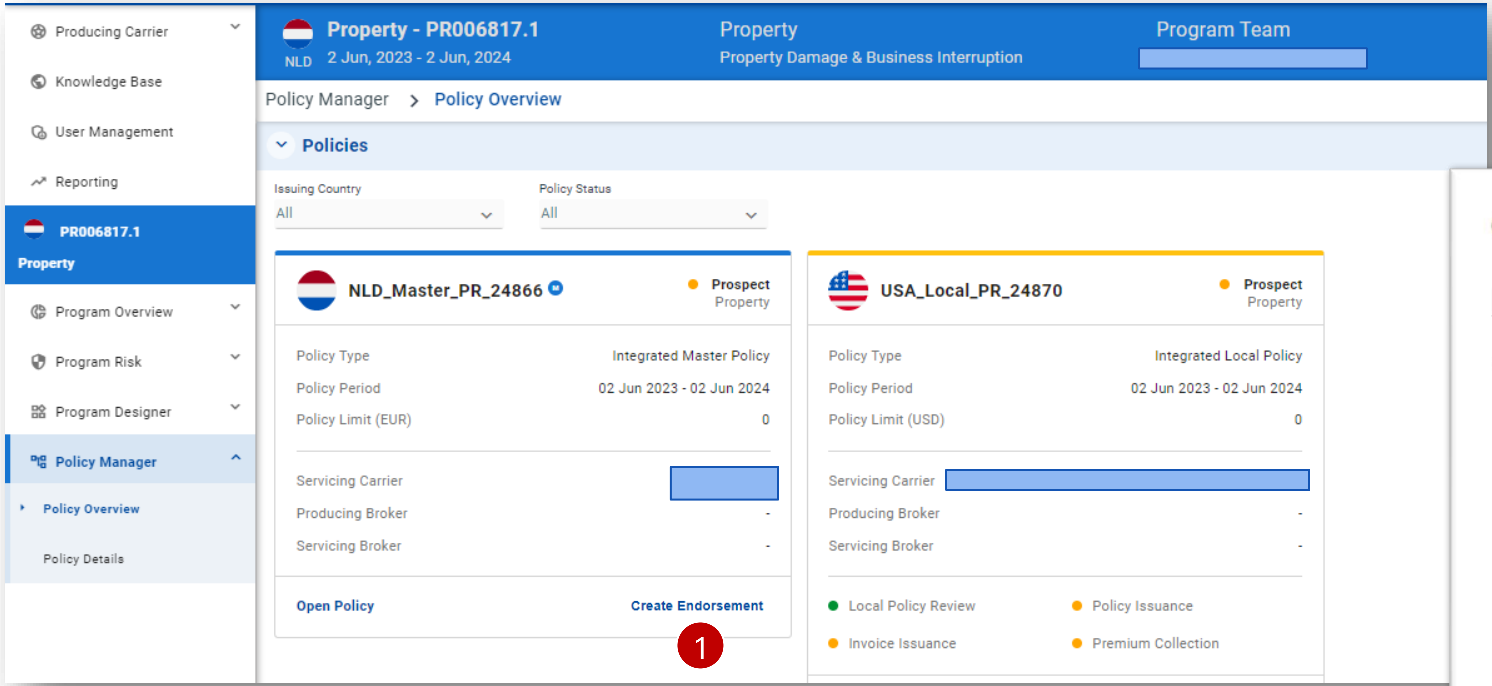
9 You can find your data copied into the T&C section of the destination policy.
Afterwards, T&C data remains editable.



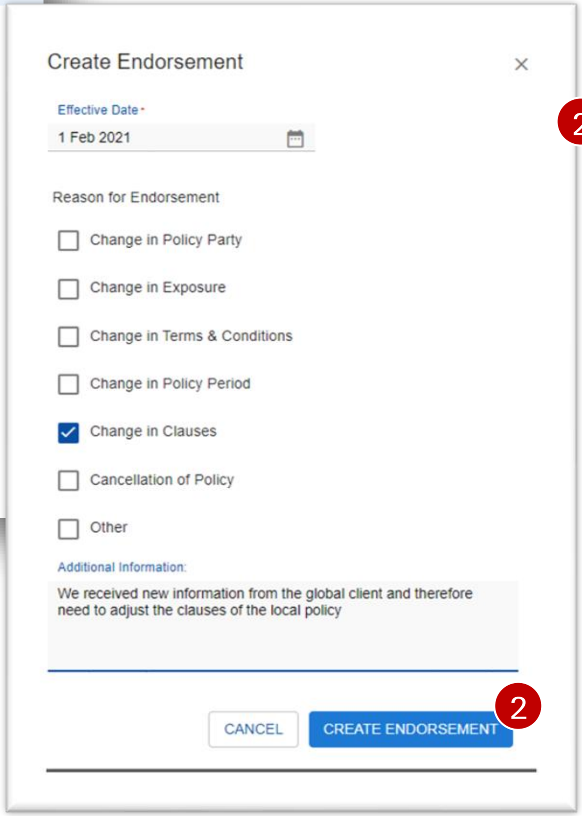
Endorsement

07

Endorsement – Create an Endorsement 1

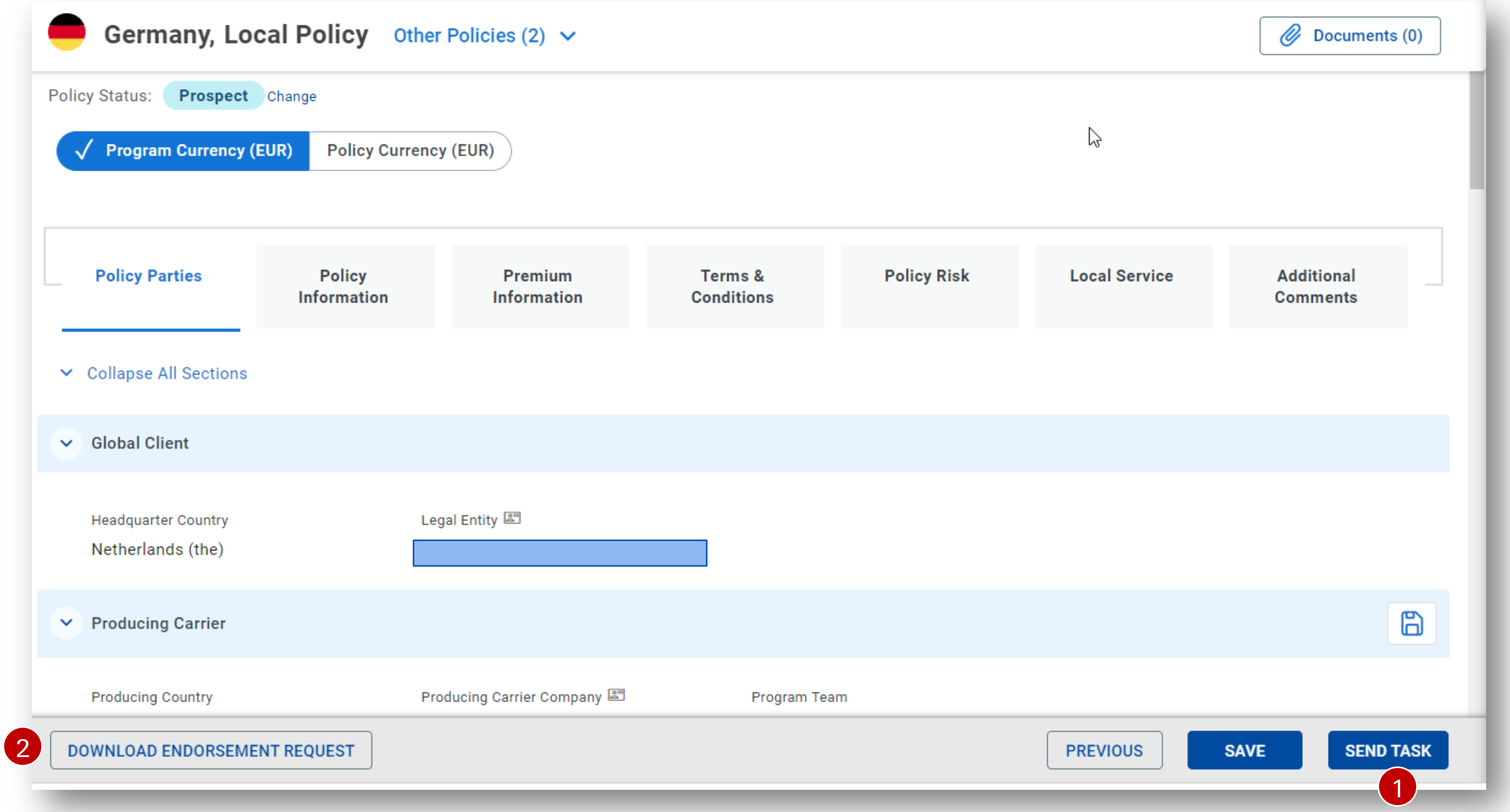


1 Once a local policy has been issued an endorsement can be created from the Local Policy Overview.



2 As a second step the user is asked to give further details around the endorsement request. By clicking on "CREATE ENDORSMENT" an endorsement request is sent to the servicing office to notify that an endorsement is in progress

Endorsement – Create an Endorsement 2



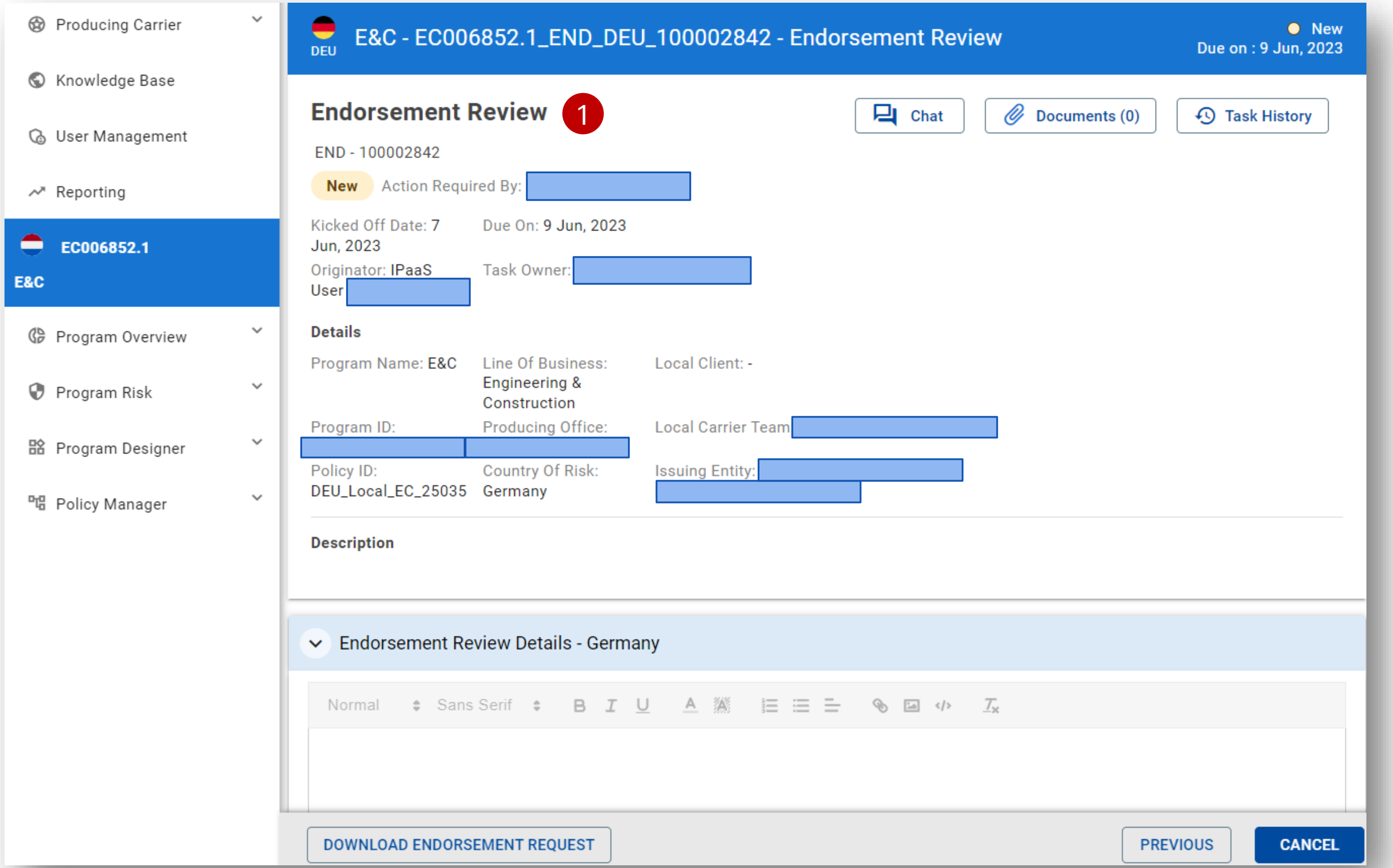
1 To complete an endorsement request, the user need to send an endorsement request from the policy details screen

In the policy details screen can adjust the information as part of the endorsement and trigger a policy review task. The servicing office will review your request and will let you know if further details are required

2 The user can also download the endorsement request

Please note that all steps need to be completed in order to request an endorsement

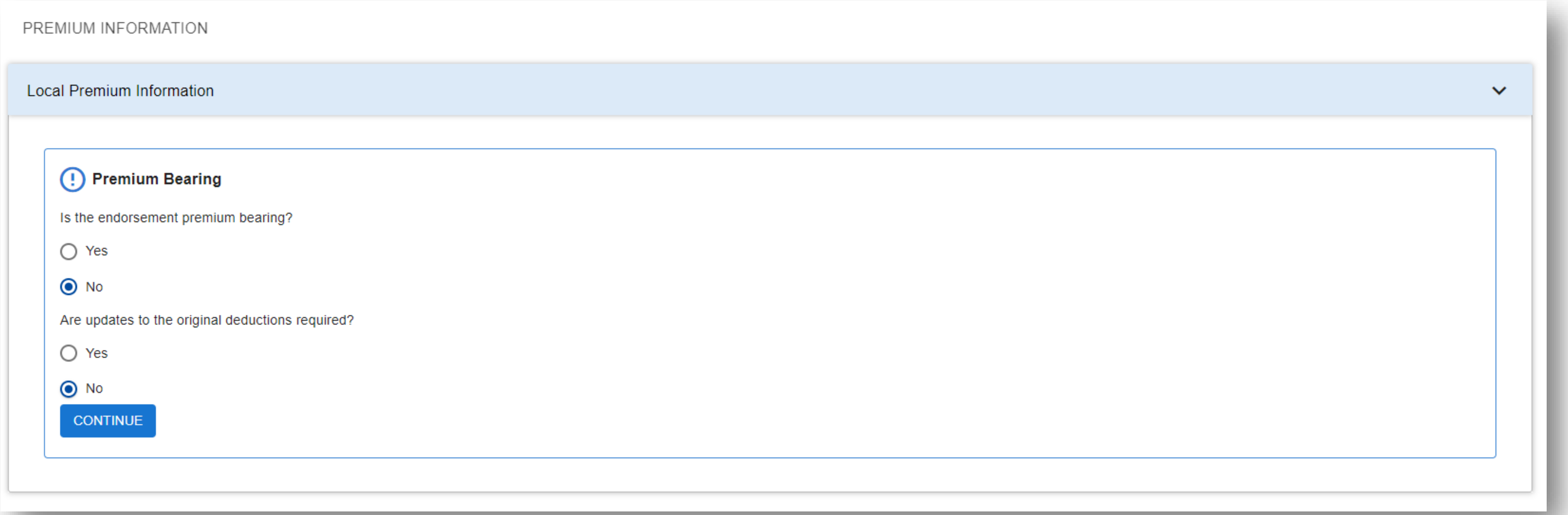
Endorsement – Create an Endorsement from Servicing Office



1 An endorsement request can also be initiated by the servicing office. In this case, the primary contact will receive an email that a new endorsement request was initiated. The user can coordinate with the servicing office to understand the request.

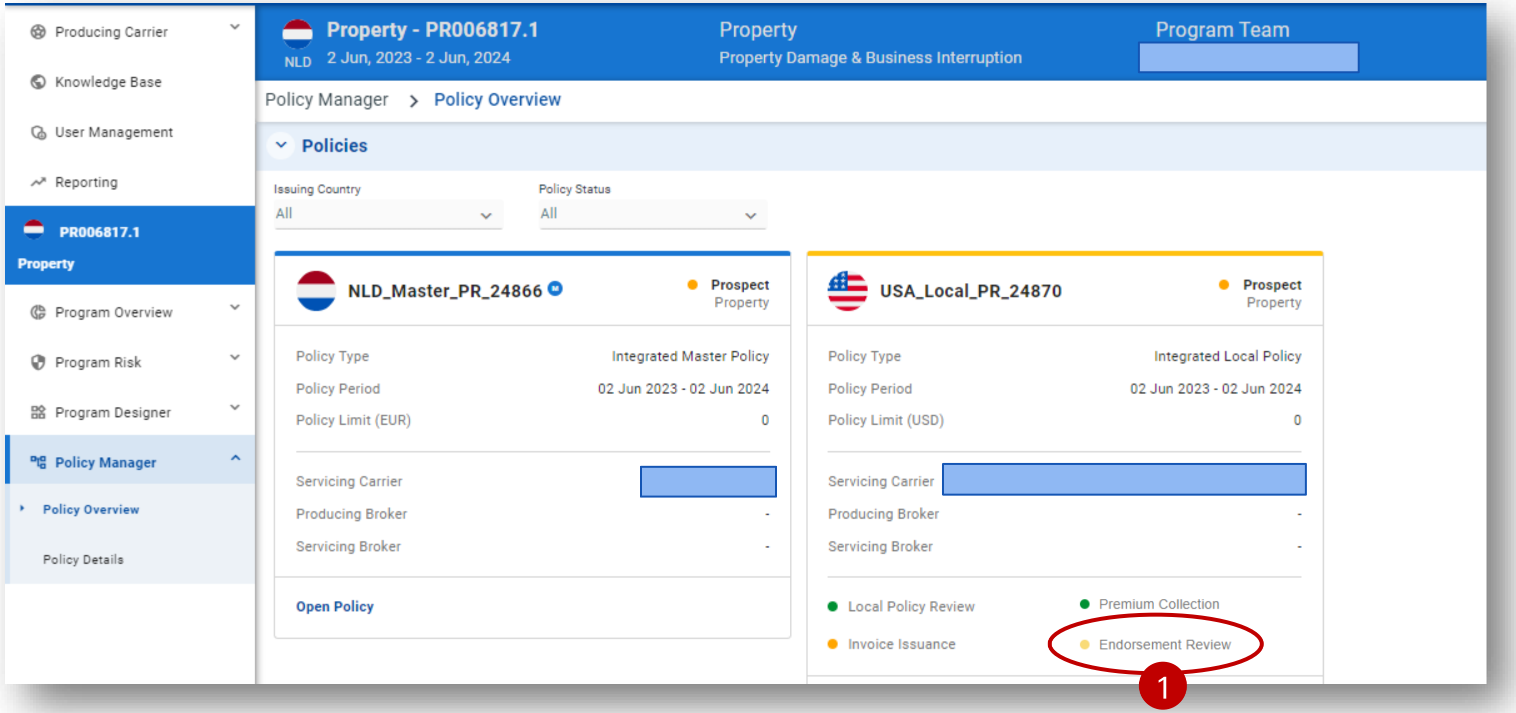
As a next step the producing office user needs to initiate an endorsement review task from the Policy Details Screen. This step can only be initiated by the producing office user and is required in order to create an endorsement review task.

Premium Bearing Endorsement



Before kicking-off an endorsement review task the user will be asked if the endorsement is premium bearing and if an update to the deductions is required. Of course, this may not be known at this point and can be adjusted during the review process.

Endorsement Tasks



Like a policy request the acceptance of the endorsement review task from the servicing office will trigger three endorsement tasks: Endorsement Issuance, Endorsement Invoice Issuance and Endorsement Premium Collection.

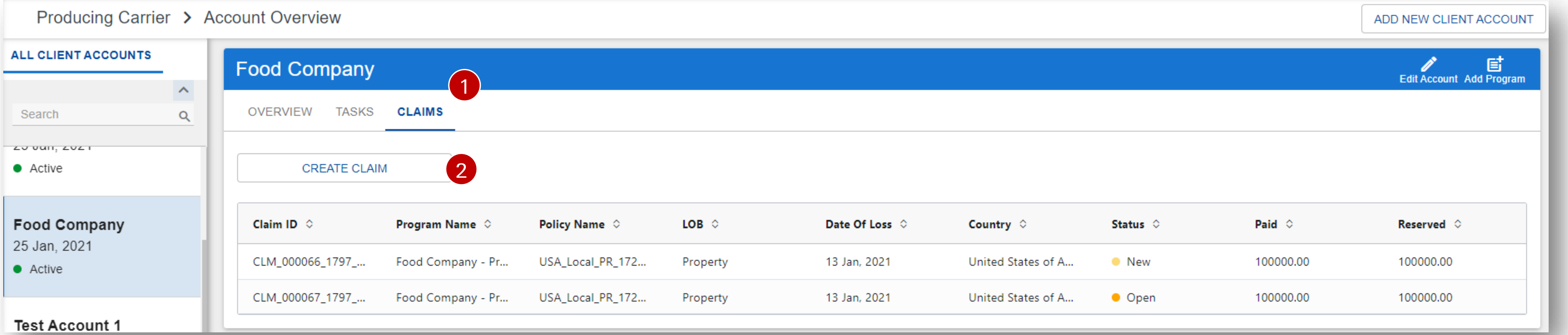
1 The status of the tasks can be monitored via the task overview or the policy overview

Endorsement tasks are set automatically to on hold in case further adjustments are required to the endorsement. They can be open any time via the task overview.

Claims

08

Claim – Claims Overview

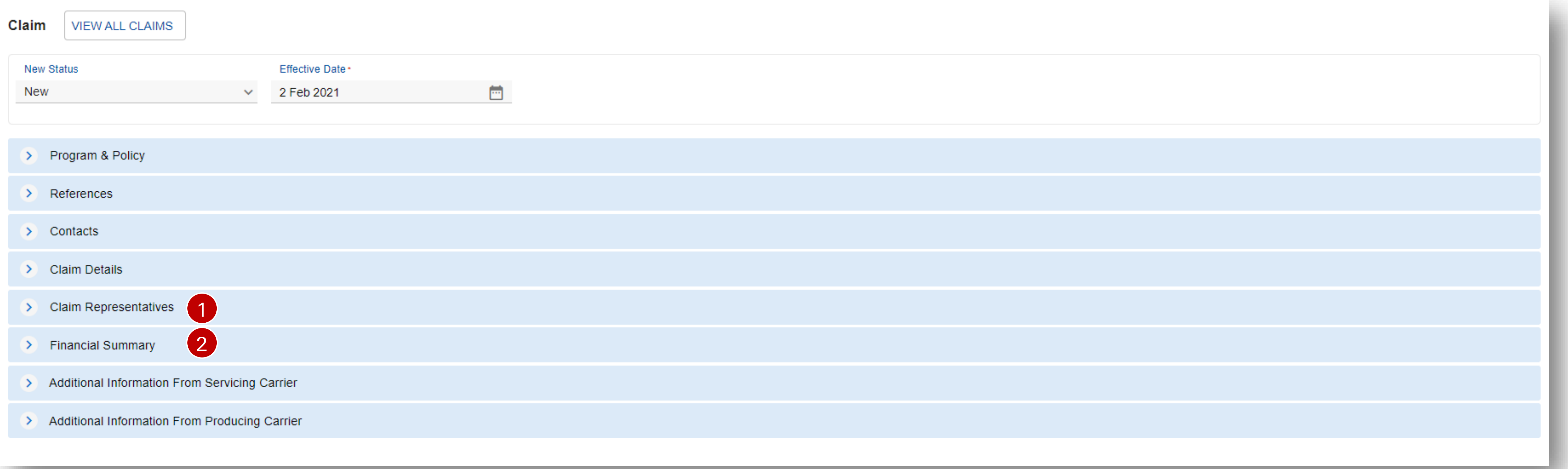


1 You can access an overview of all reported claims for each account via the claims tab

2 In case, you need to support a claim to the servicing office. You can do this via the “CREATE CLAIM” button.

A claim can be reported by the producing and by the servicing office. If the servicing office is updating or creating a new claim. The primary contact of the claims team will get an email.

Claim – Reporting a new claim



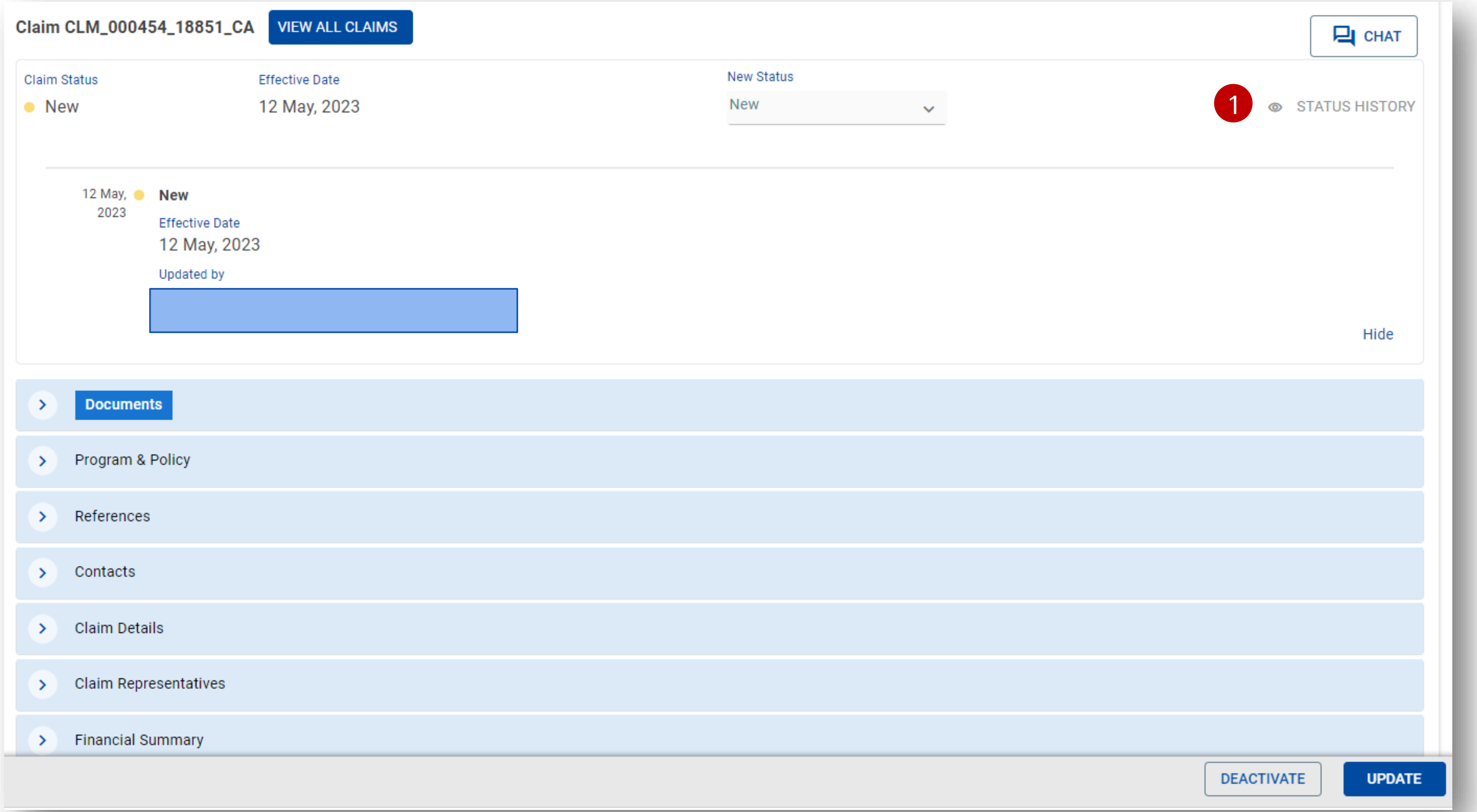
To report a claim only few information's are needed:

1 - Claim Representatives **and**

2 - Financial Details, the financial details can also be marked as “Not Applicable” in case this is not known

Claim – Status History

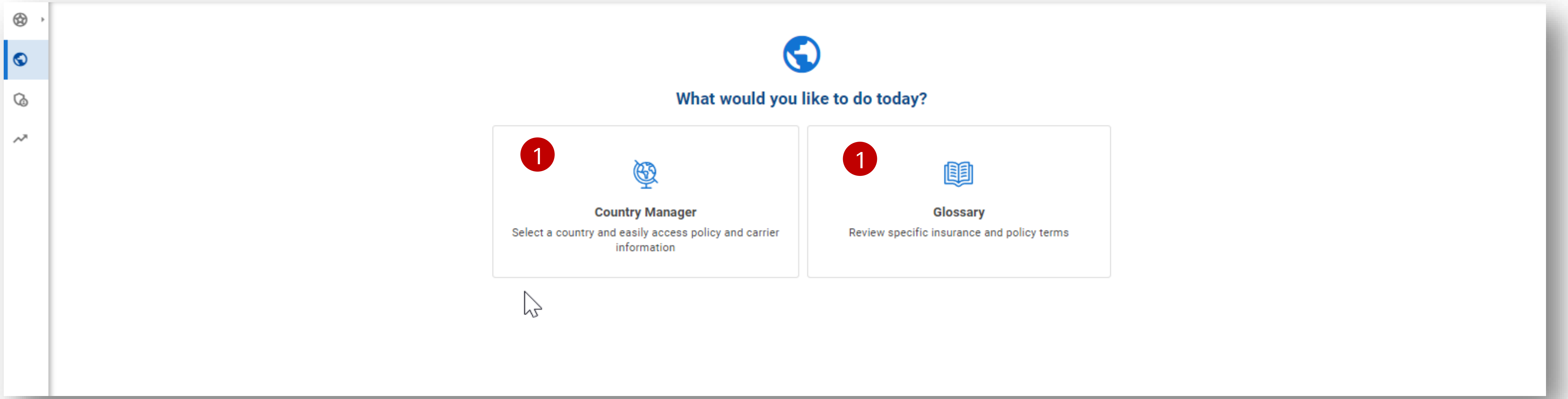
1 Through the status history, the user can track the status of a claim and see the updates the Servicing Office made.



Knowledge Base

09

Knowledge Base Home

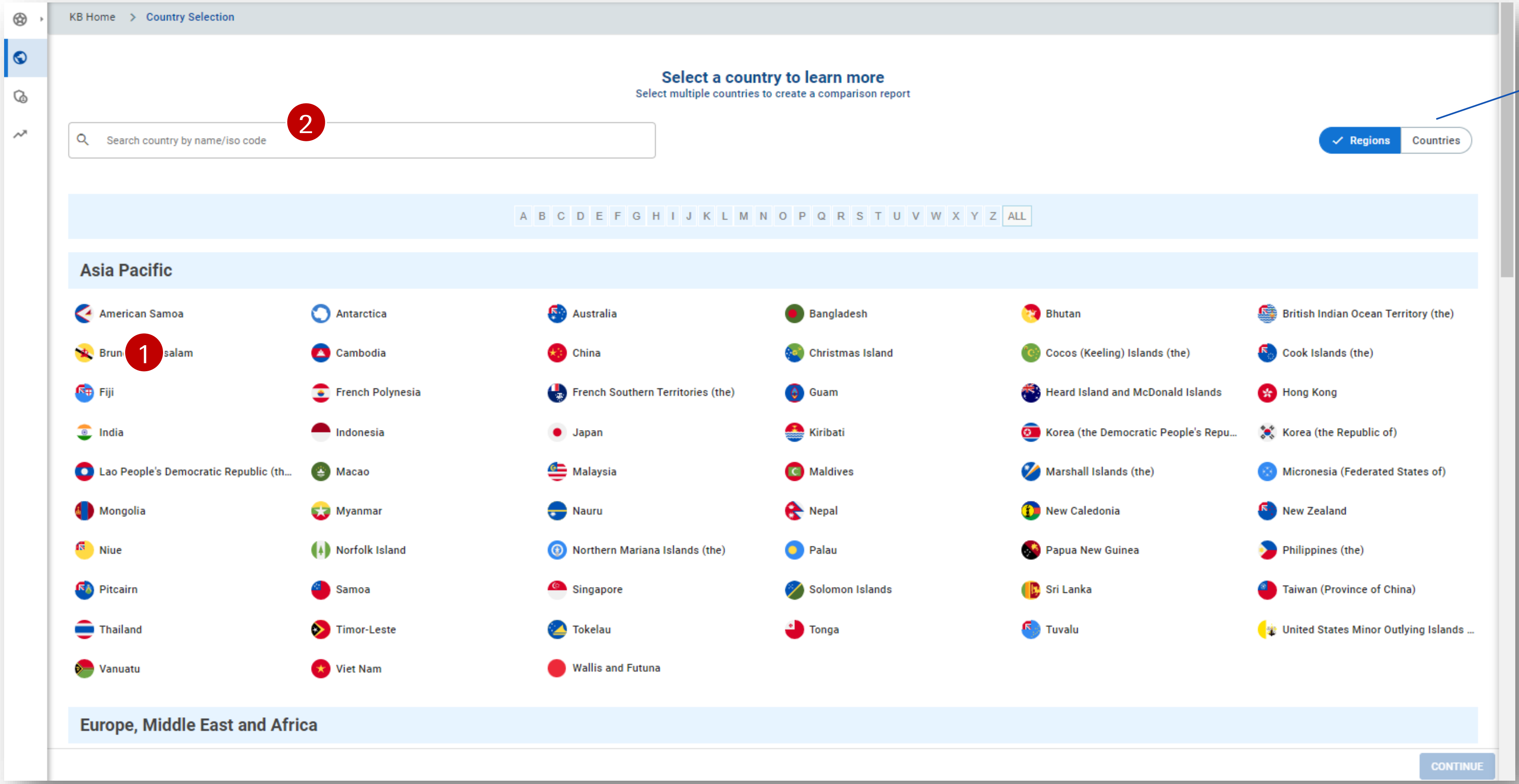


Knowledge Base is the home of all Knowledge and source of all driven rules in the platform.

Currently consisting of a Country Manager Module but further modules will follow.

1 Opening Knowledge Base, a user can directly go to the Country Manager or the Glossary

Country Manager



Order by Regions / Country

In the Country Manager module a user is asked to select one or multiple countries:

1. By clicking on a specific country **or**
2. Search for a country.

Country Manager

Once a country is selected, the user must complete the following fields:

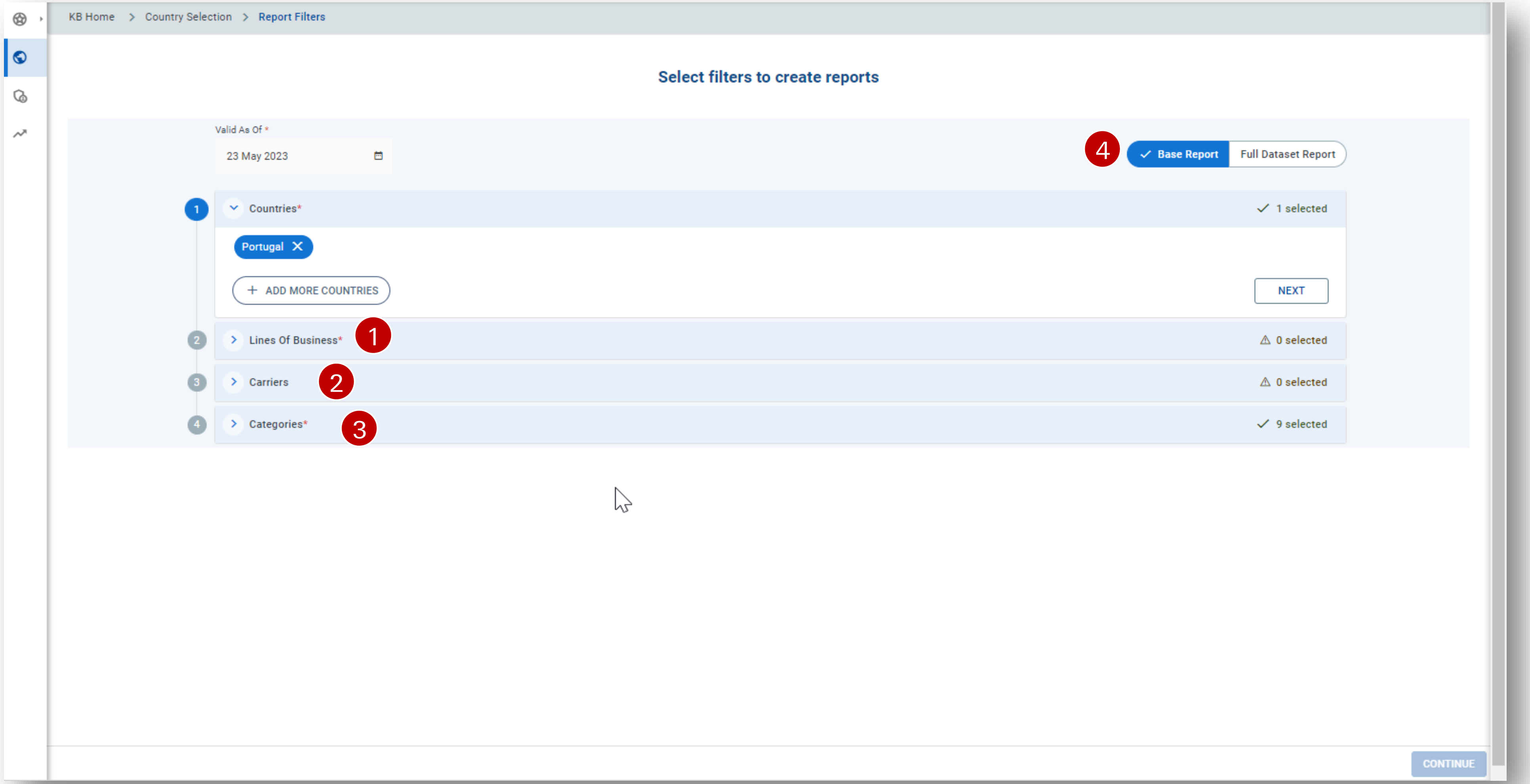
1 At least one LoBs

2 Carriers

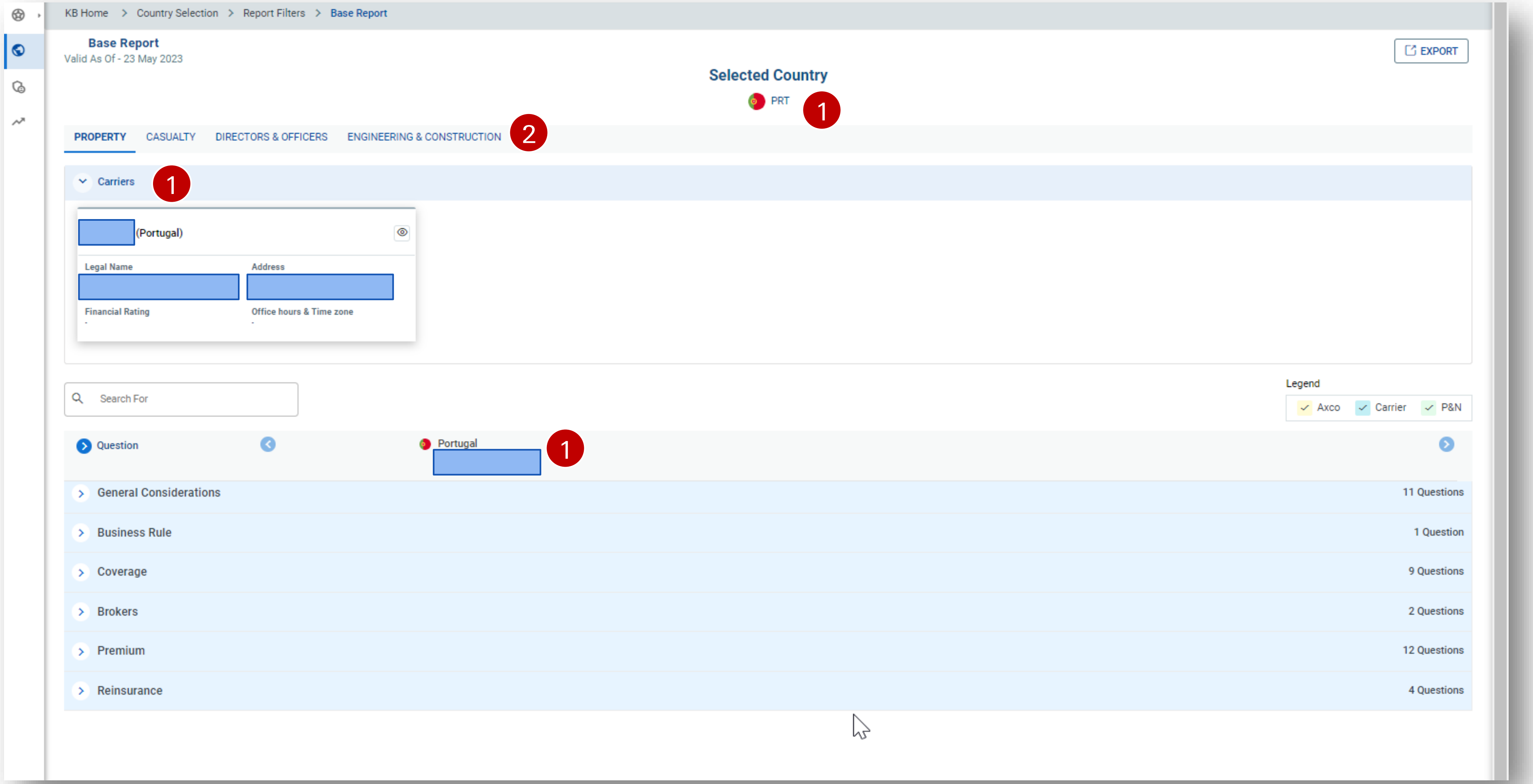
3 Categories

4 The user can also select the type of report:

- Base Report (key info) **or**
- Full Dataset Report (full set of Q&As)



Country Manager – Country



Each Country in our Database has a dedicated country page, where 1 Country and Carrier related information are displayed.

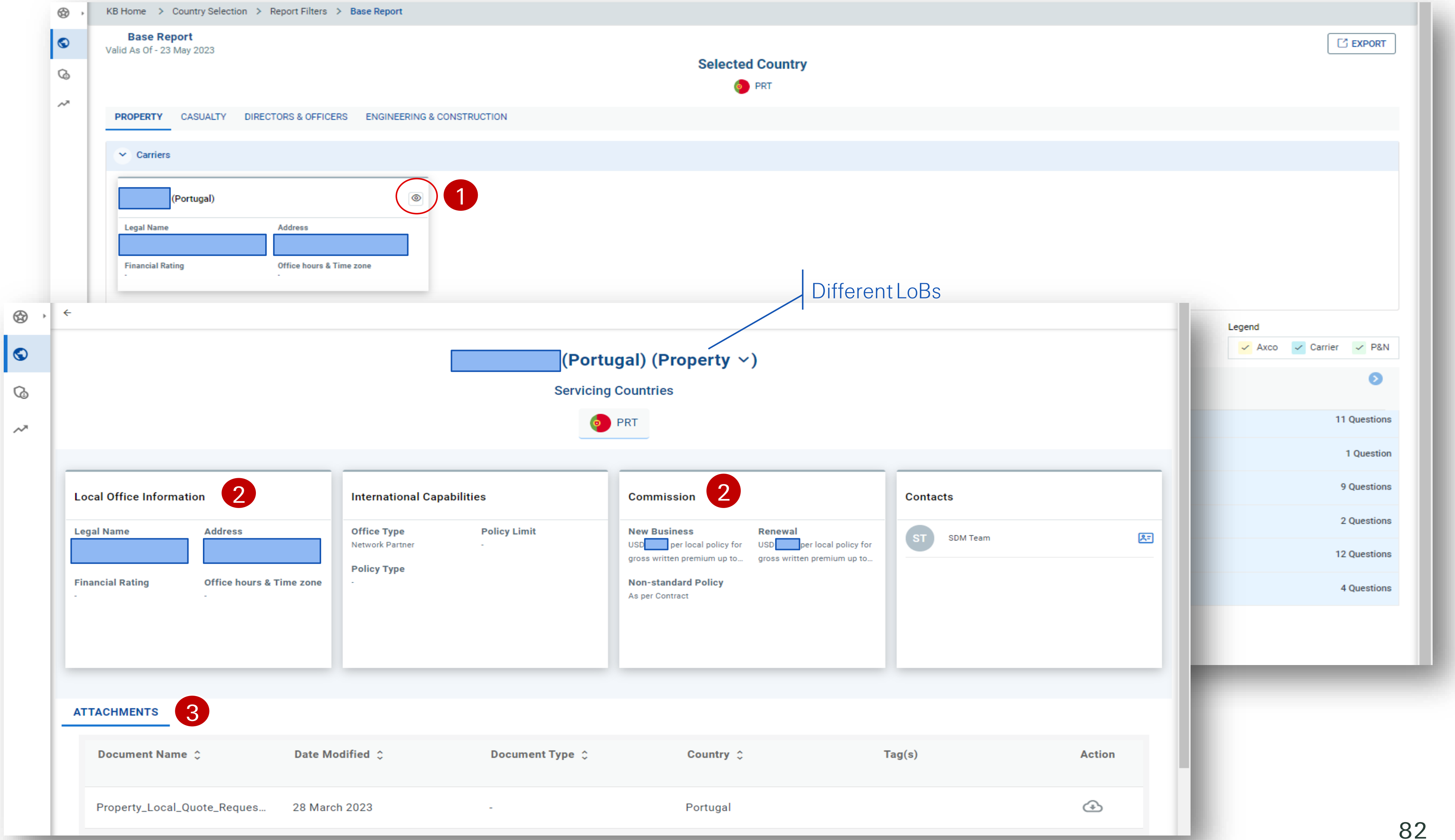
2 Data is separated by LoBs.

Country Manager – Carrier Details

1 By clicking on "eye" icon, the user is directed to a Carrier Detail Screen.

2 Here a user can access carrier information such as Address or Contacts.

3 In the attachment sections carrier specific documents such as pre-quote sheets or policy wordings are stored.



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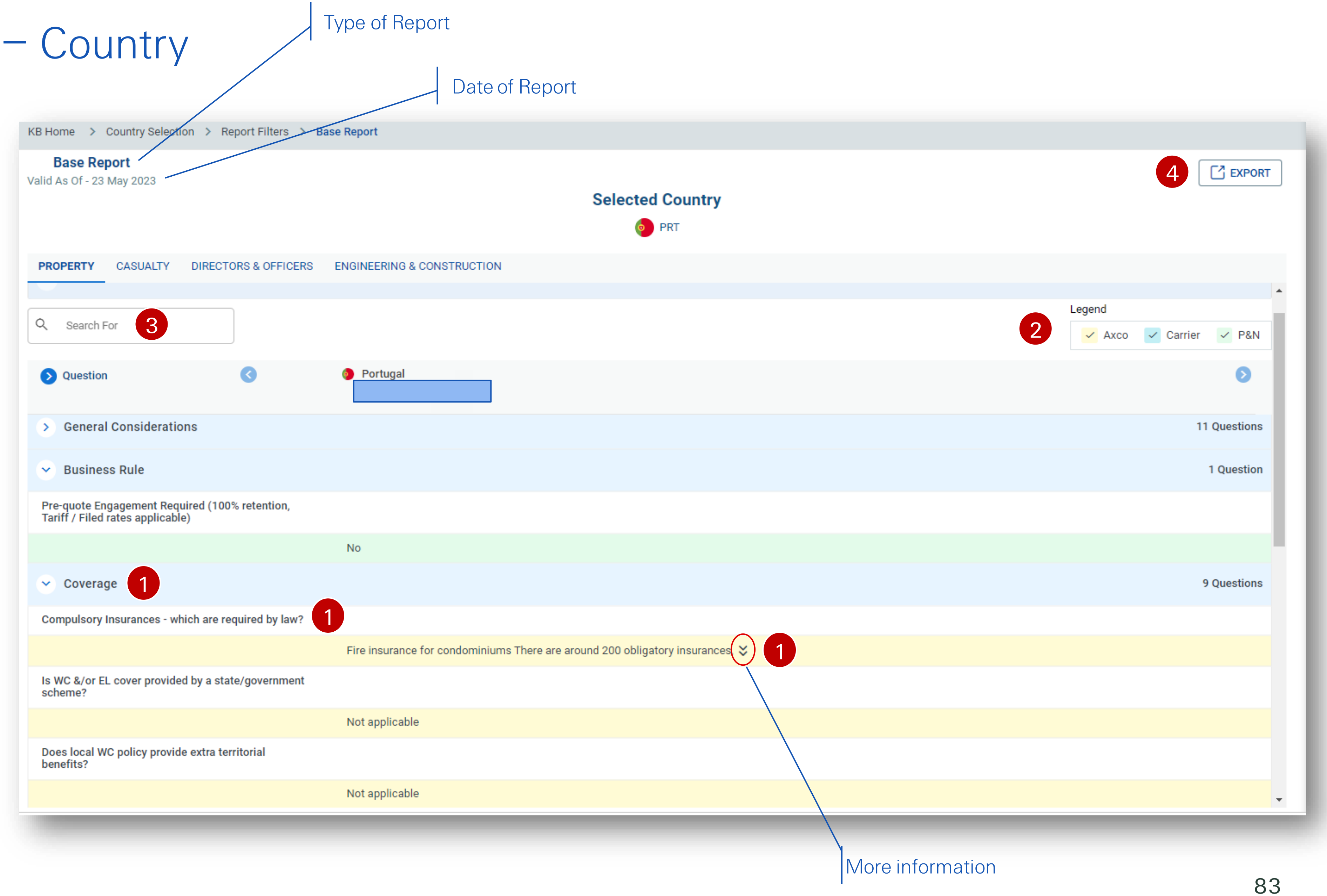
Country Manager – Country

1. Each country page has different sections with Q&As, which form the report.

2. Different colors correspond to different licenses.

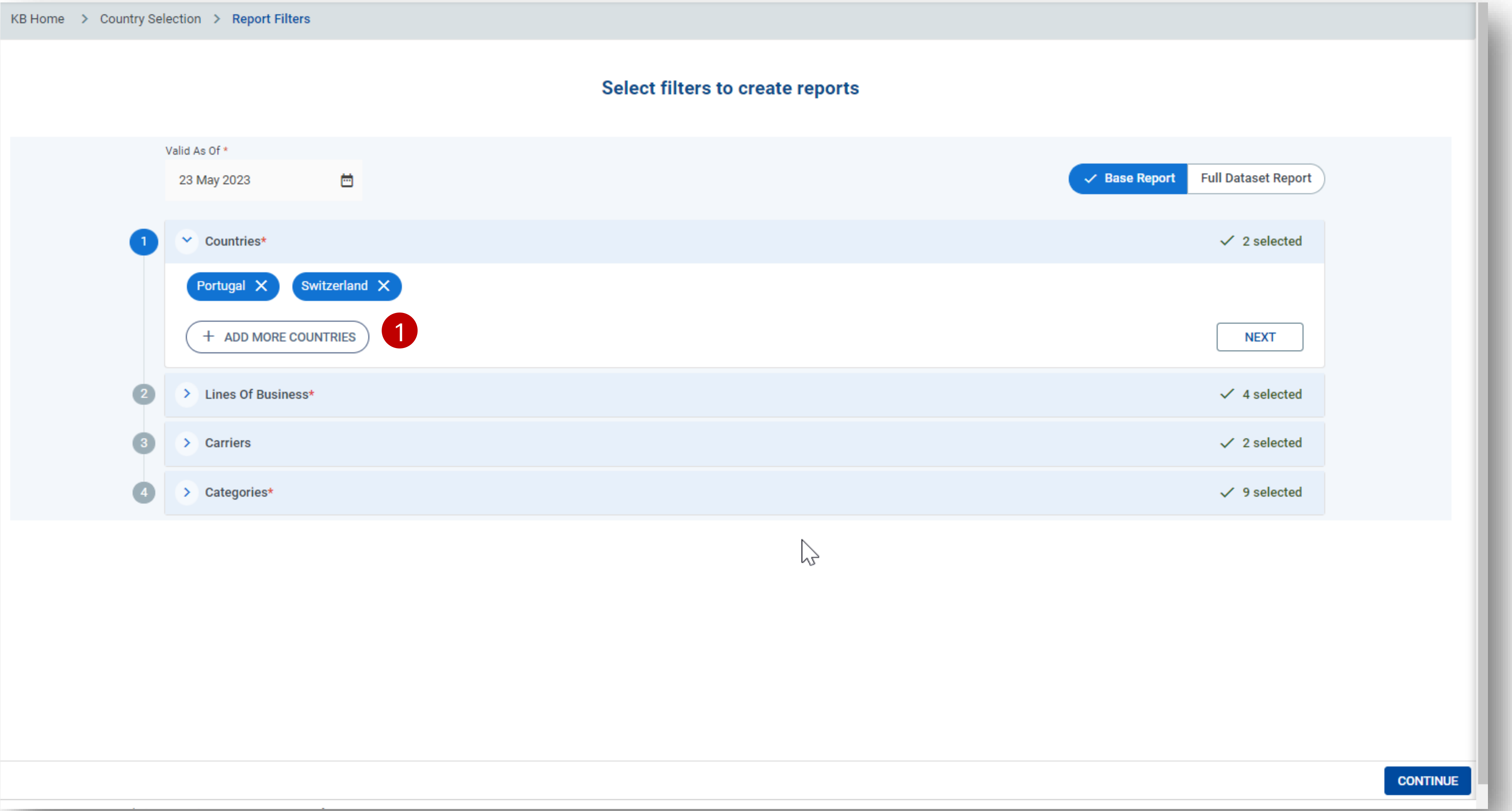
3. The user can also search for keywords.

4. The country report can be exported.
N.B. The Q&As displayed in the report will depend on which license the user selects.

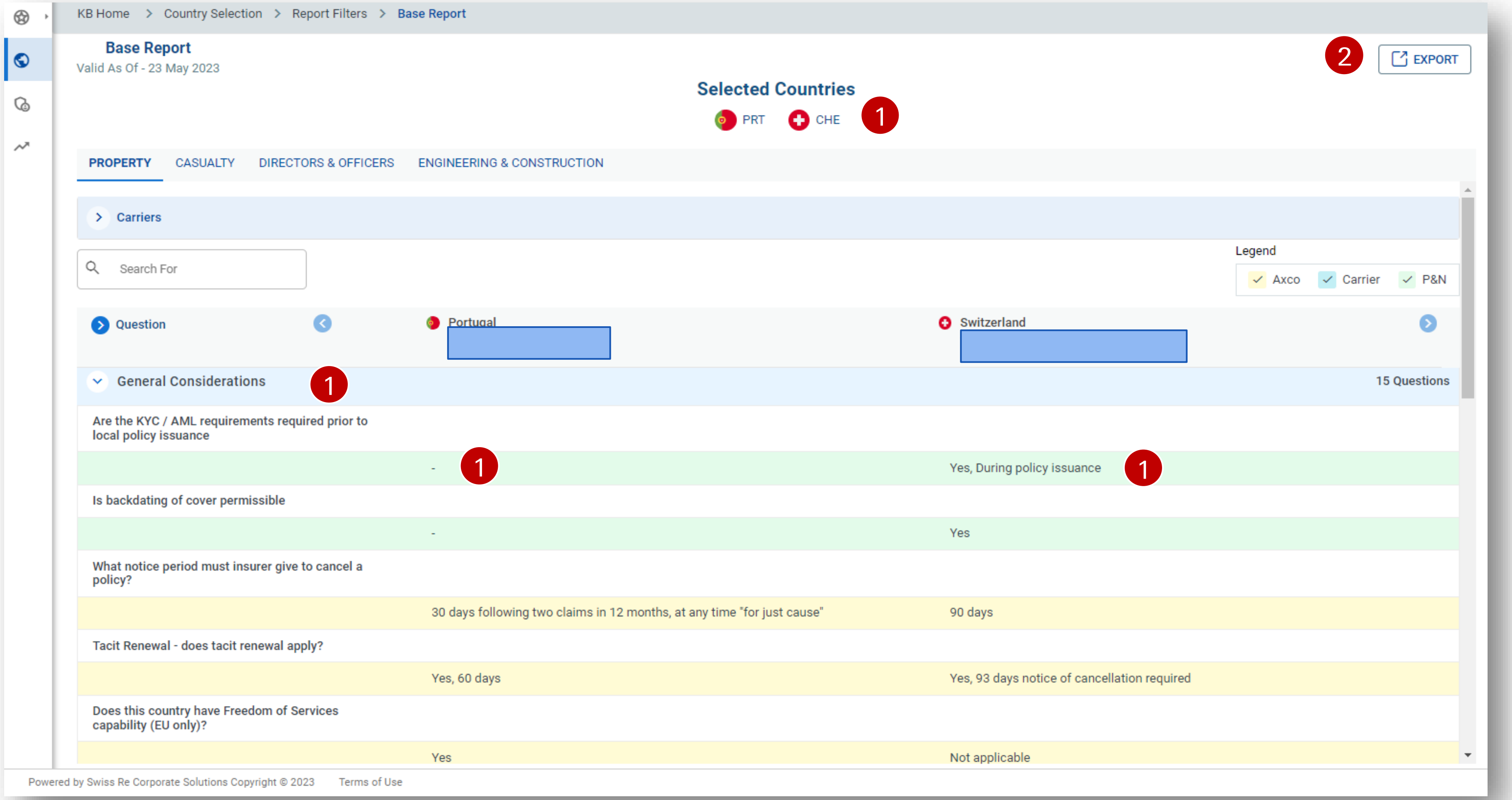


Comparison Report

1 The user can also add more countries in the report for comparison.



Comparison Report

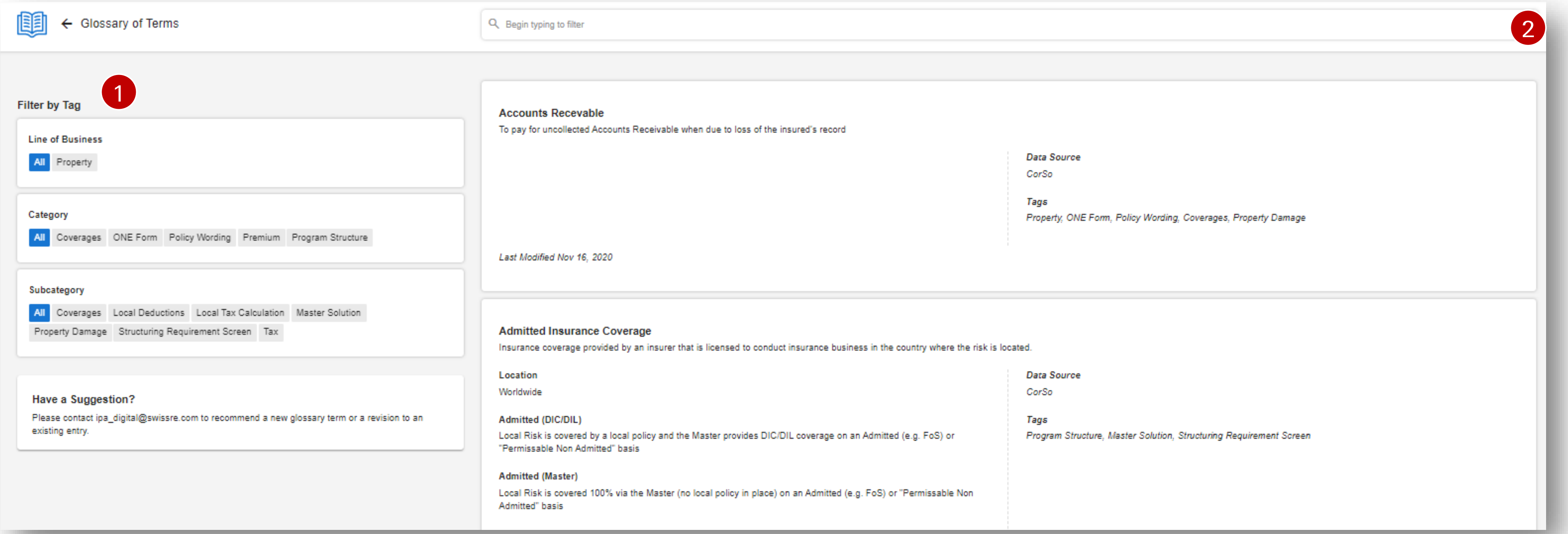


1. The two or more countries are now displayed, with their respective Q&As.

2. The country report can be exported.

N.B. The Q&As displayed in the report will depend on which license the user selects.

Glossary



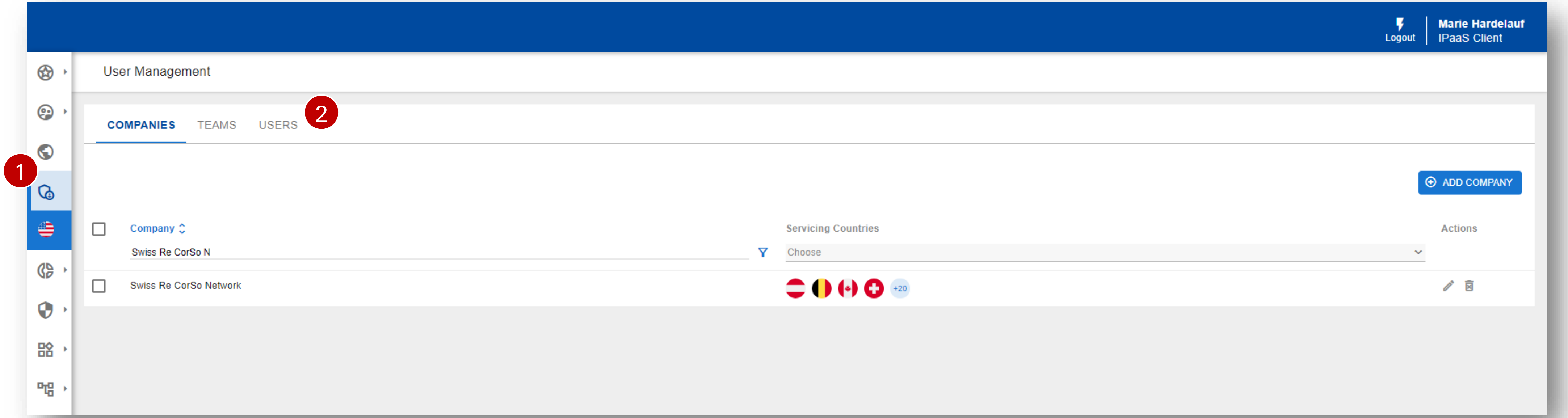
The Glossary module includes different definitions of terms used within the PULSE Application. A user can filter terms by using the ta 1 or search a specific term in the keyword search 2

User Management

10

User Management

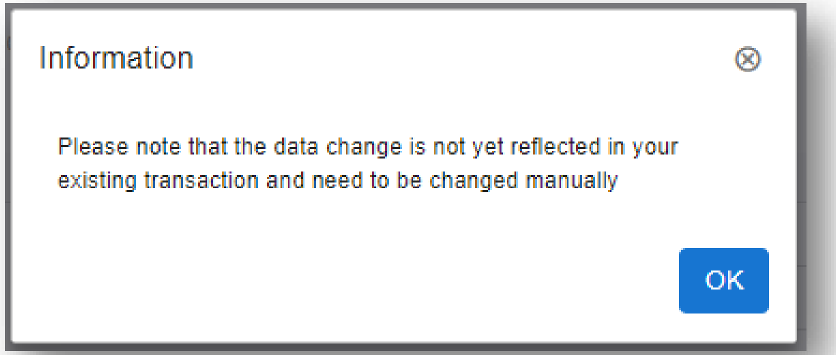
Only Applicable for Admin Users



1. User can access the User Management module through the left-hand pane. Prerequisite is that the user has the Administrator access, otherwise the icon will not be visible.

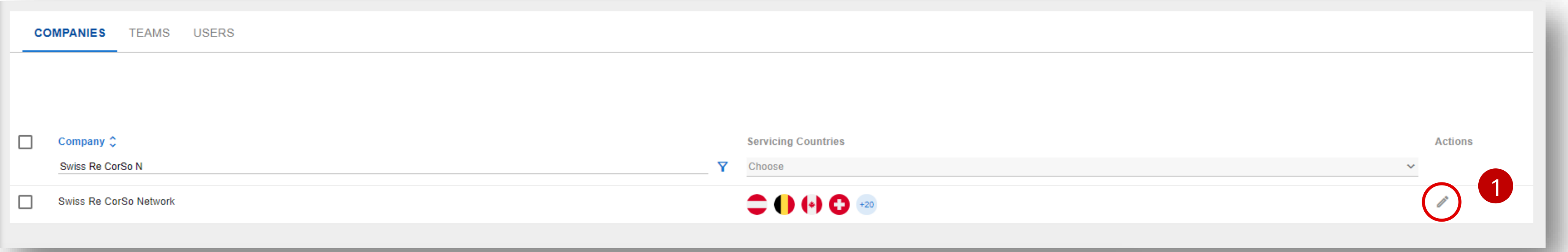
2. The user management module enables the management of **carrier, team and user** data.

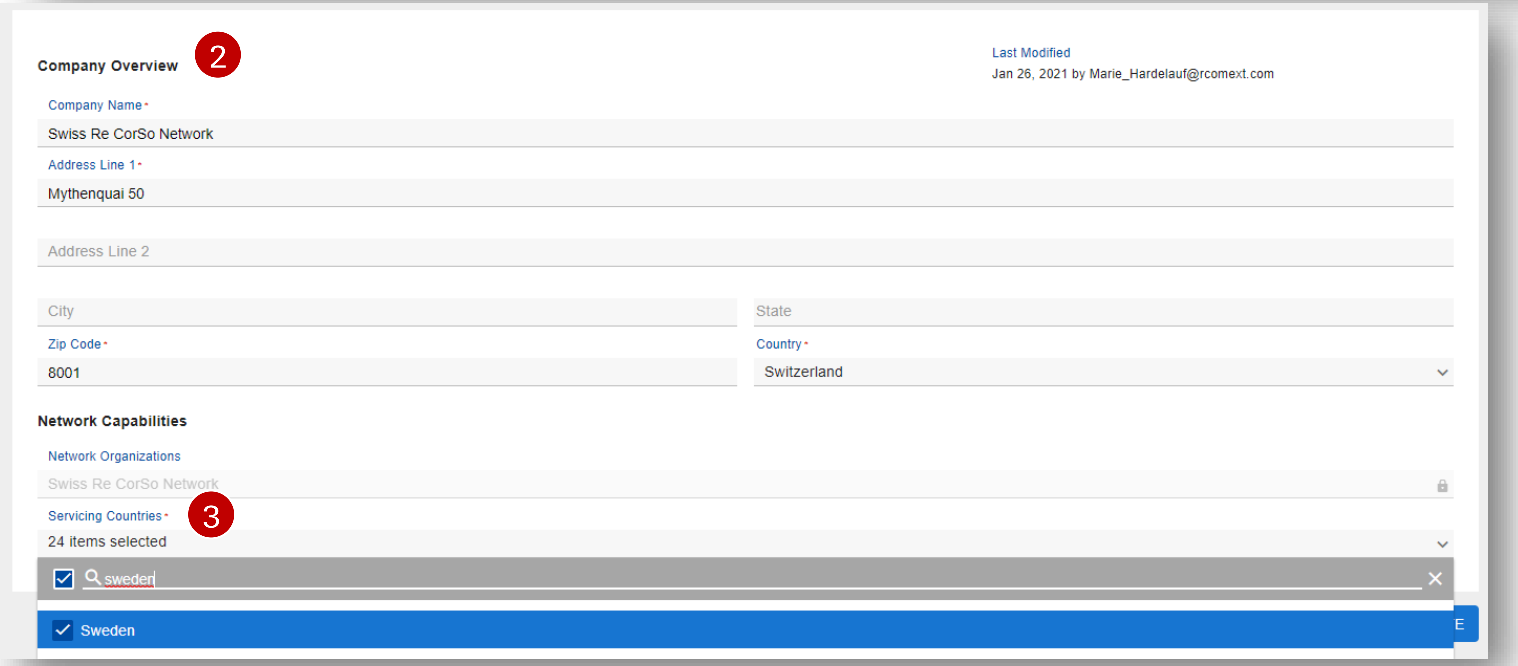
User Management – Updating Data



When updating different information as part of the User Management, the user will see the displayed warning. Background of this informative warning is that the affected information is part of transaction and that the new data will be reflected only in new transactions. Transactions are defined as tasks, claims, policies or programs.

User Management – Company dimension



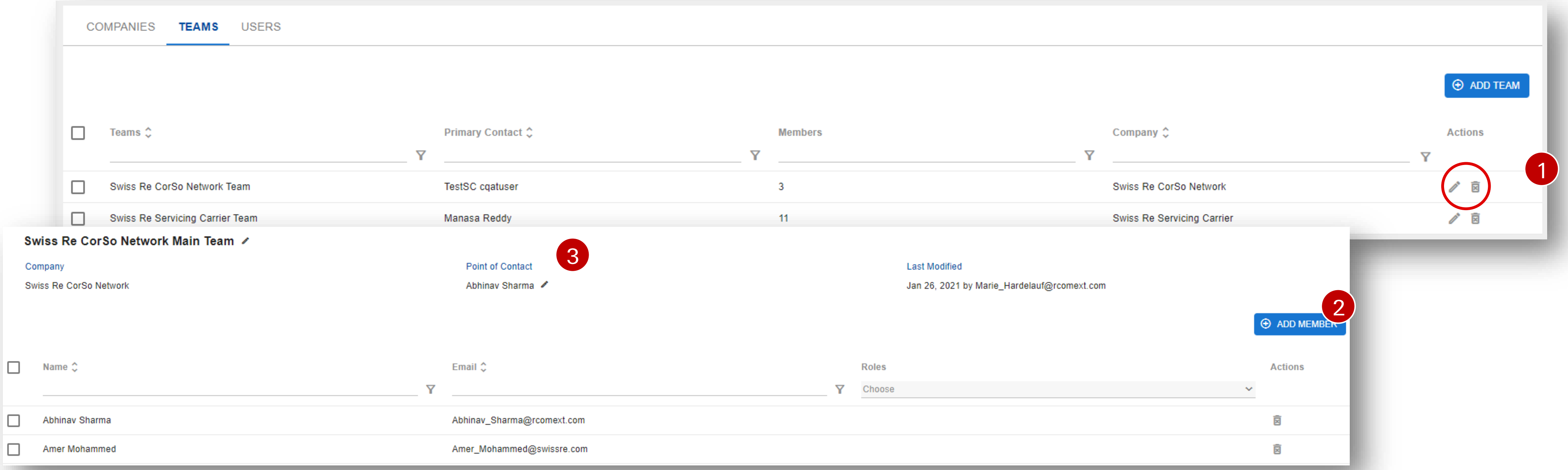


1. Carrier Company details can be managed via the 'Companies' tab. By clicking on the **pen icon**, the user will be redirected to the Company Overview.

2. As part of the Company Overview, administrator can manage company details such as:
   - Company Name
   - Address
   - Servicing Countries

3. 'Servicing Countries' are those countries in which the respective carrier can issue policies. Details of the actual capabilities by line of business shall be available in Knowledge Base.

User Management – Team dimension



1 Teams within a company can be managed via the 'Teams' tab. Three actions are available:

- **Edit** – Direct the user to the team's overview
- **Delete** – Deactivate an existing team
- **"ADD TEAM"** – Adding new teams

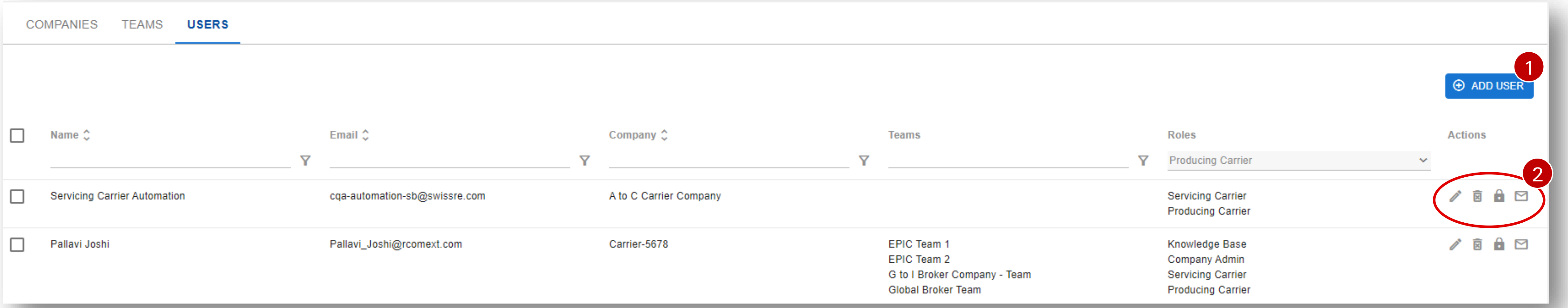
2 As part of the Team Overview, administrator can manage team members:

- Adding existing users to the team or
- Removing users from a team

Note that only users as part of the same company can be added to a team.

3 In order to create a team, one 'point of contact' must be defined. The point of contact can be changed anytime. Within a team the point of contact will receive the email notification for any transaction, such as tasks or claims.

User Management – User dimension

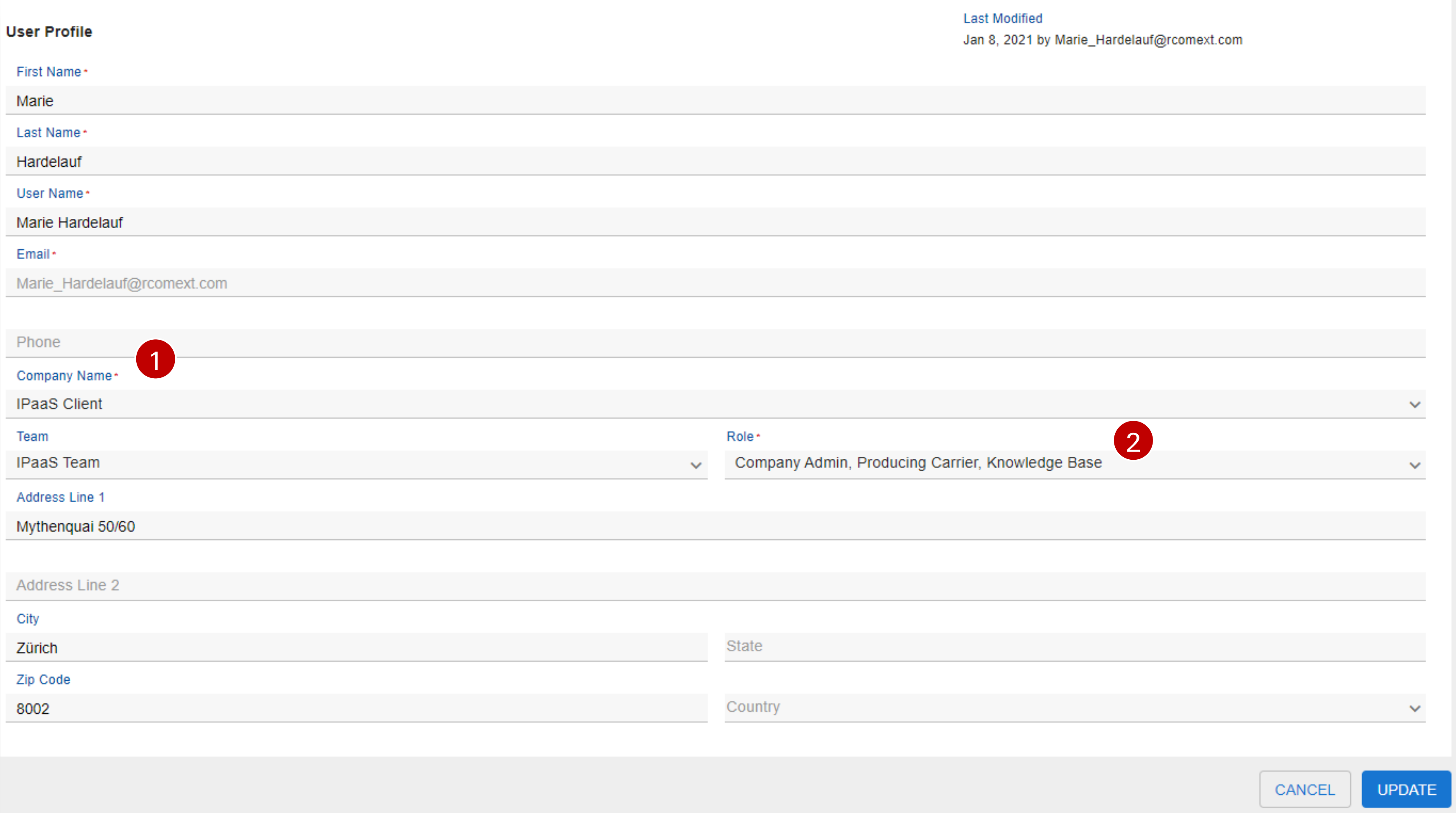


1. User details can be managed via the 'Users' tab. New users can be created via the "ADD USER" button.

2. As part of the user management, following actions are available:

- **Edit** – Direct the user to the user profile (see next slide)
- **Delete** – Deactivate an existing user
- **Reset Password** – Sends an email to an existing use asking to reset the password
- **Activate** – Retriggers an Okta activation email to users, where the activation link has expired.

User Management – User Profile



1. When setting up a user, certain information is mandatory, such as Company, E-mail address and User Name. The email cannot be changed later after creating a user. If the email was entered wrongly, a new user will need to be created.

2. Minimum one role must be assigned to any user. Following roles are available:
   - **Company Admin** (grants access to User Management module)
   - **Producing Carrier**
   - **Servicing Carrier**
   - **Knowledge Base** (grants access to Country Manager and Glossary)

Reporting

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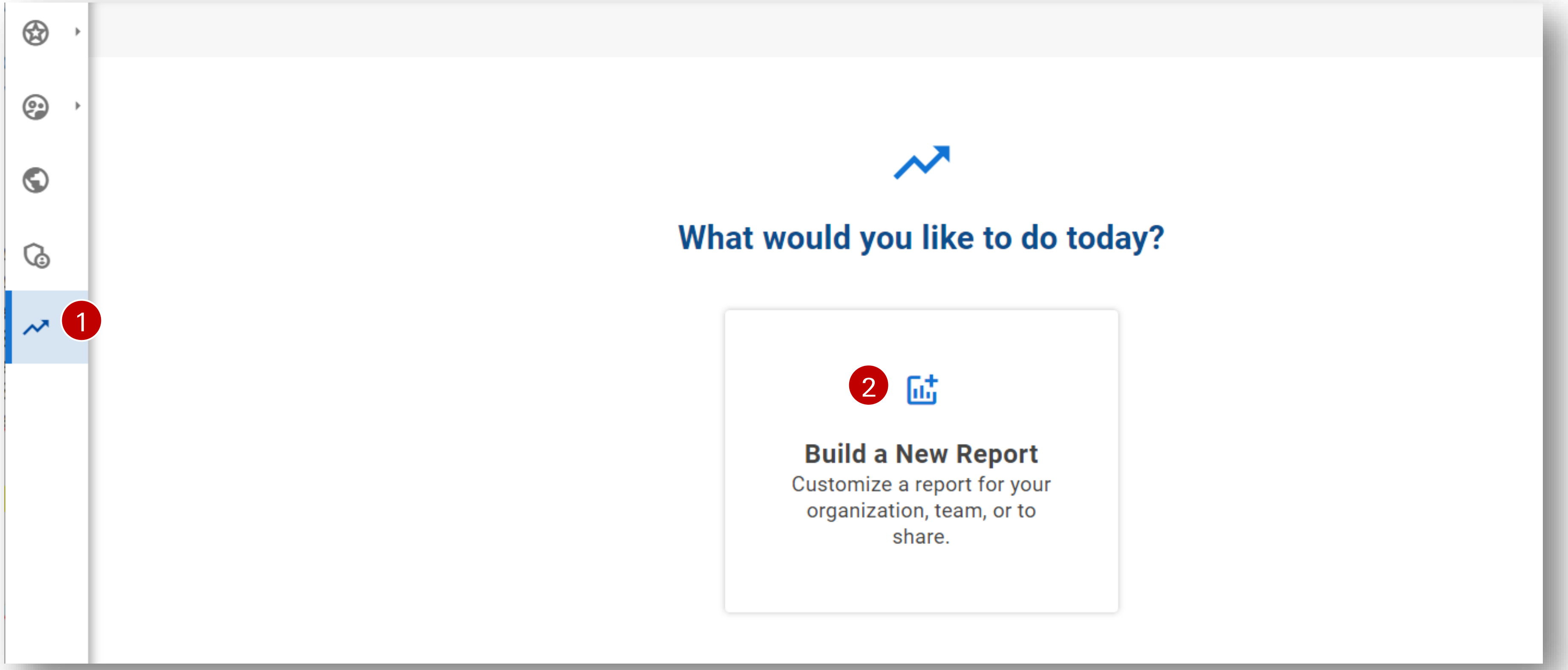
Report: Users are able to create customized reports to share with their stakeholders

To build a new a report:

1 Select the report icon

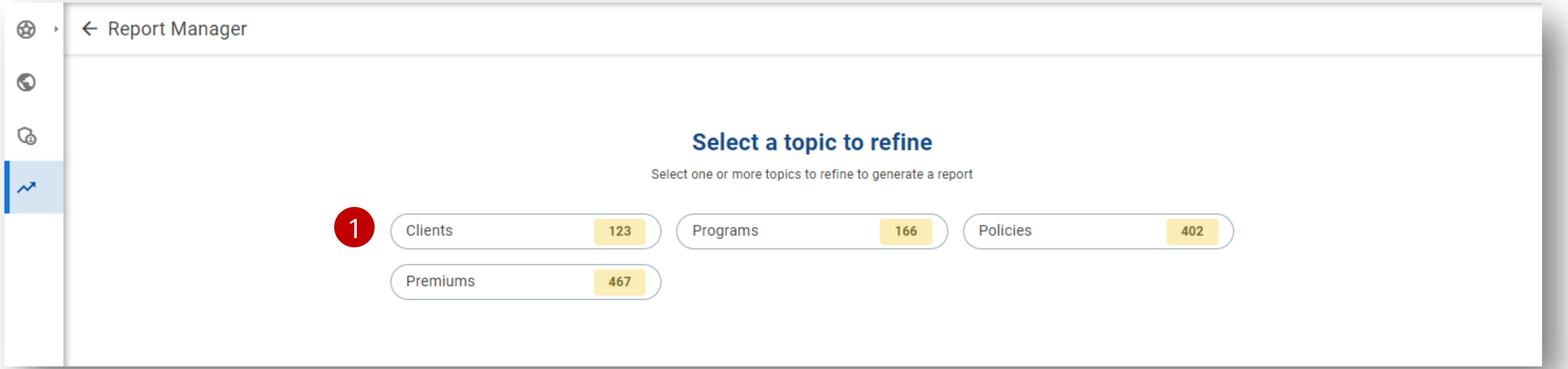
2 Click on 'Build a New Report'



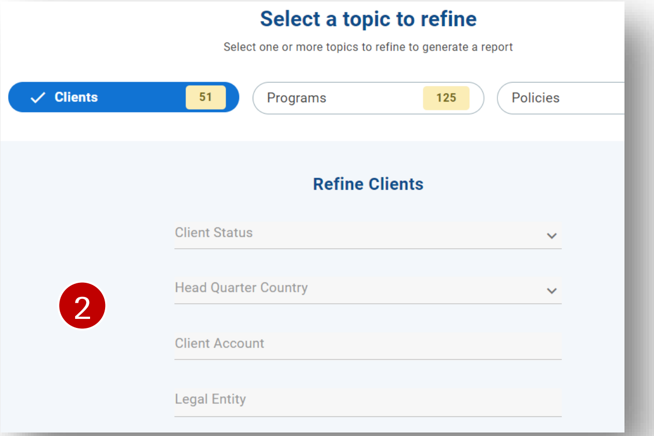
Report:

To create a report:

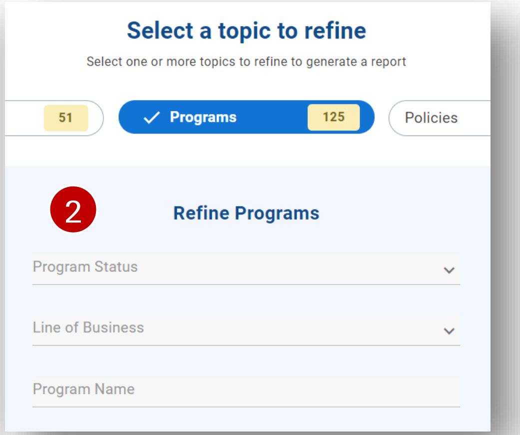
1. Select a theme/topic that you would like to dig into (clients, programs, policies or premiums).
2. Refine your selected topic by using the multiple filters available.



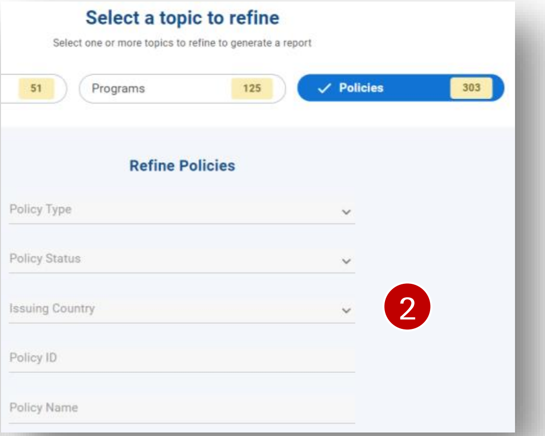
Clients



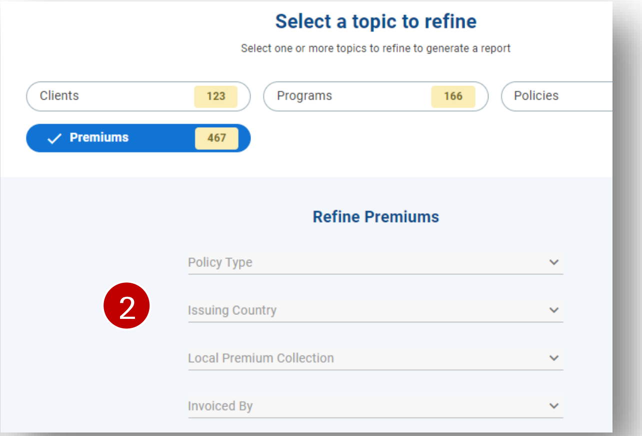
Programs



Policies



Premiums

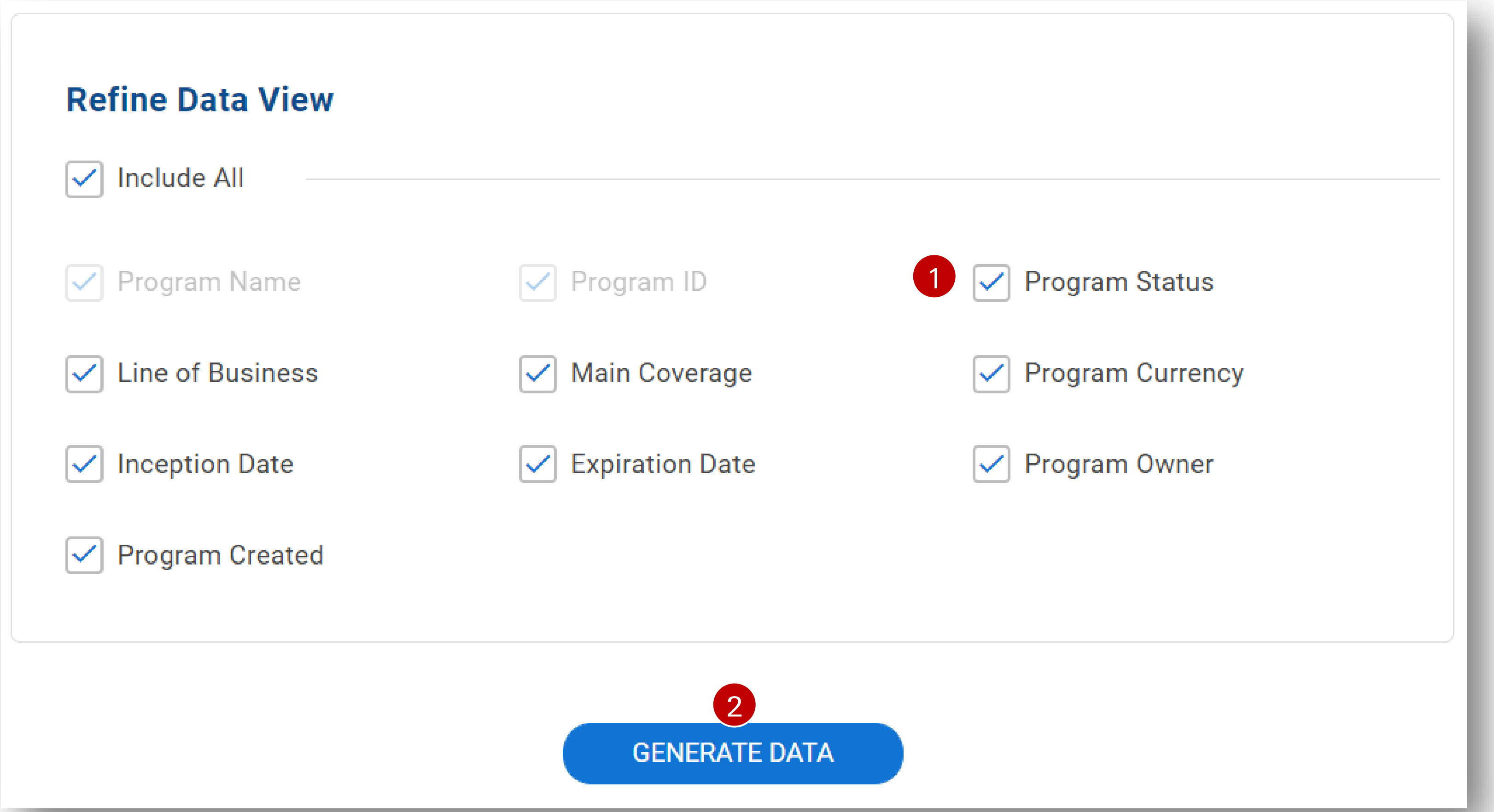


Report:

To create a report:

1 Select the data/attributes that you would like to be included in the report.

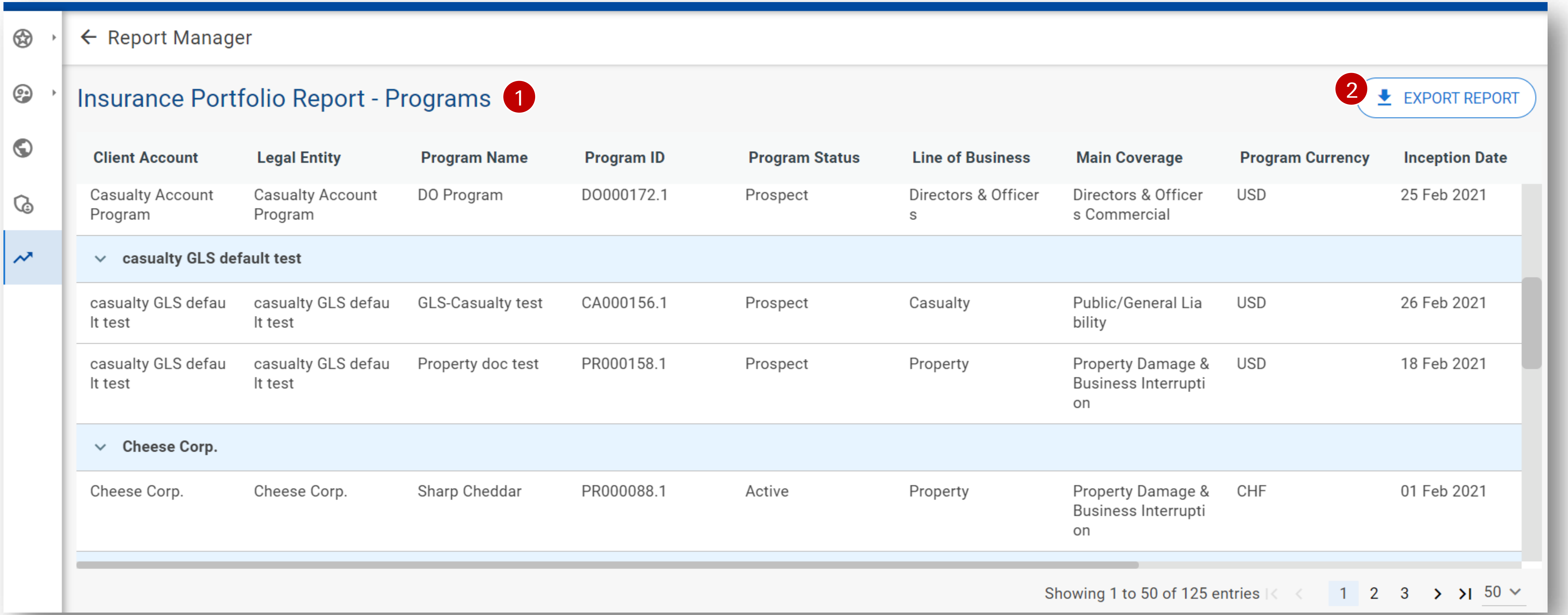
2 Click on Generate Data.



Report:

1 Review your report on screen.

2 Export your report in Excel format.



Client Account	Legal Entity	Program Name	Program ID	Program Status	Line of Business	Main Coverage	Program Currency	Inception Date
Casualty Account Program	Casualty Account Program	DO Program	DO000172.1	Prospect	Directors & Officers	Directors & Officers Commercial	USD	25 Feb 2021
casualty GLS default test								
casualty GLS default test	casualty GLS default test	GLS-Casualty test	CA000156.1	Prospect	Casualty	Public/General Liability	USD	26 Feb 2021
casualty GLS default test	casualty GLS default test	Property doc test	PR000158.1	Prospect	Property	Property Damage & Business Interruption	USD	18 Feb 2021
Cheese Corp.								
Cheese Corp.	Cheese Corp.	Sharp Cheddar	PR000088.1	Active	Property	Property Damage & Business Interruption	CHF	01 Feb 2021

Renewals

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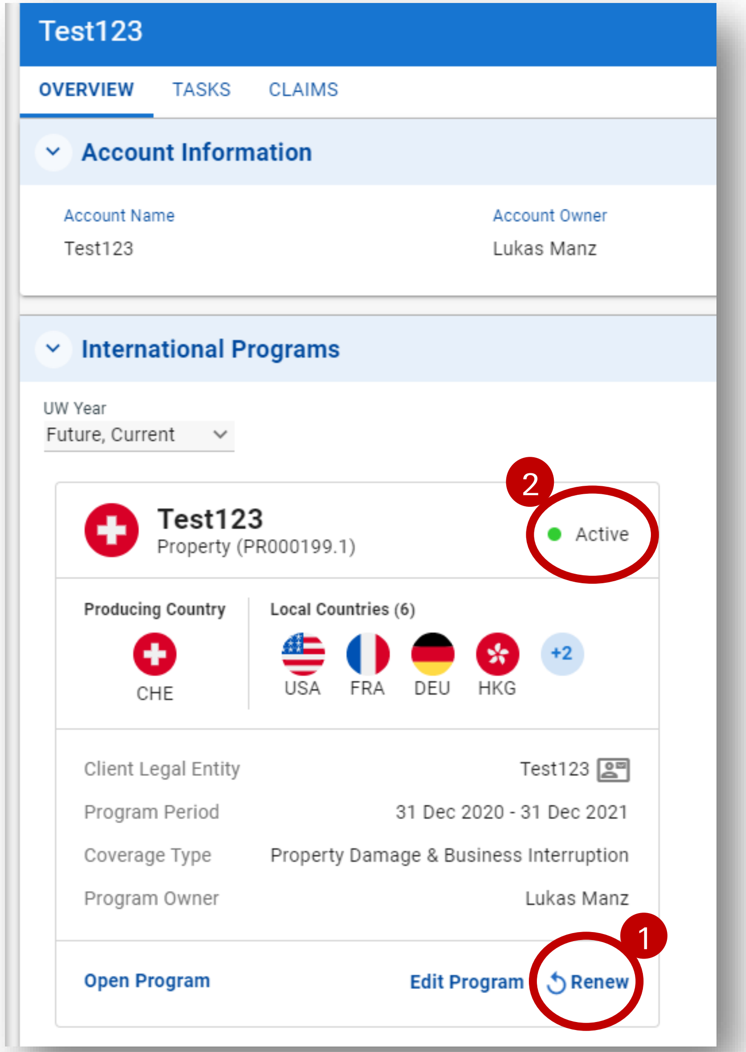
Renewals

To renew a program:

1 Select the 'Renew' button:

2 You will only be able to renew a program if the status of it is: **active, active & complete or expired.**

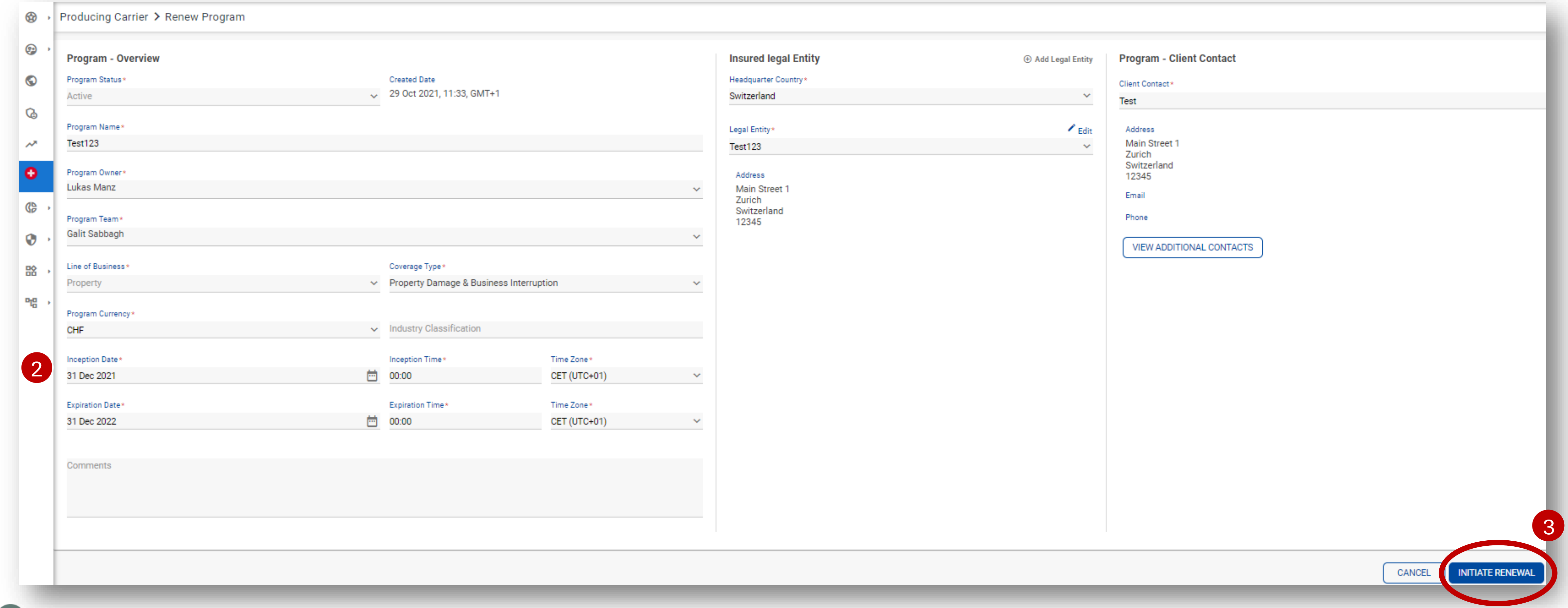


Renewals

Update the Program information.

2 Check/update the dates of your renewal program

3 Afterwards, click on Initiate Renewal



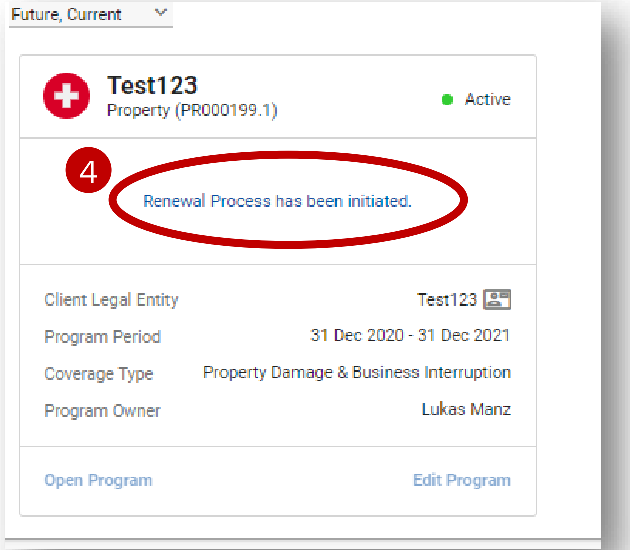
Renewals

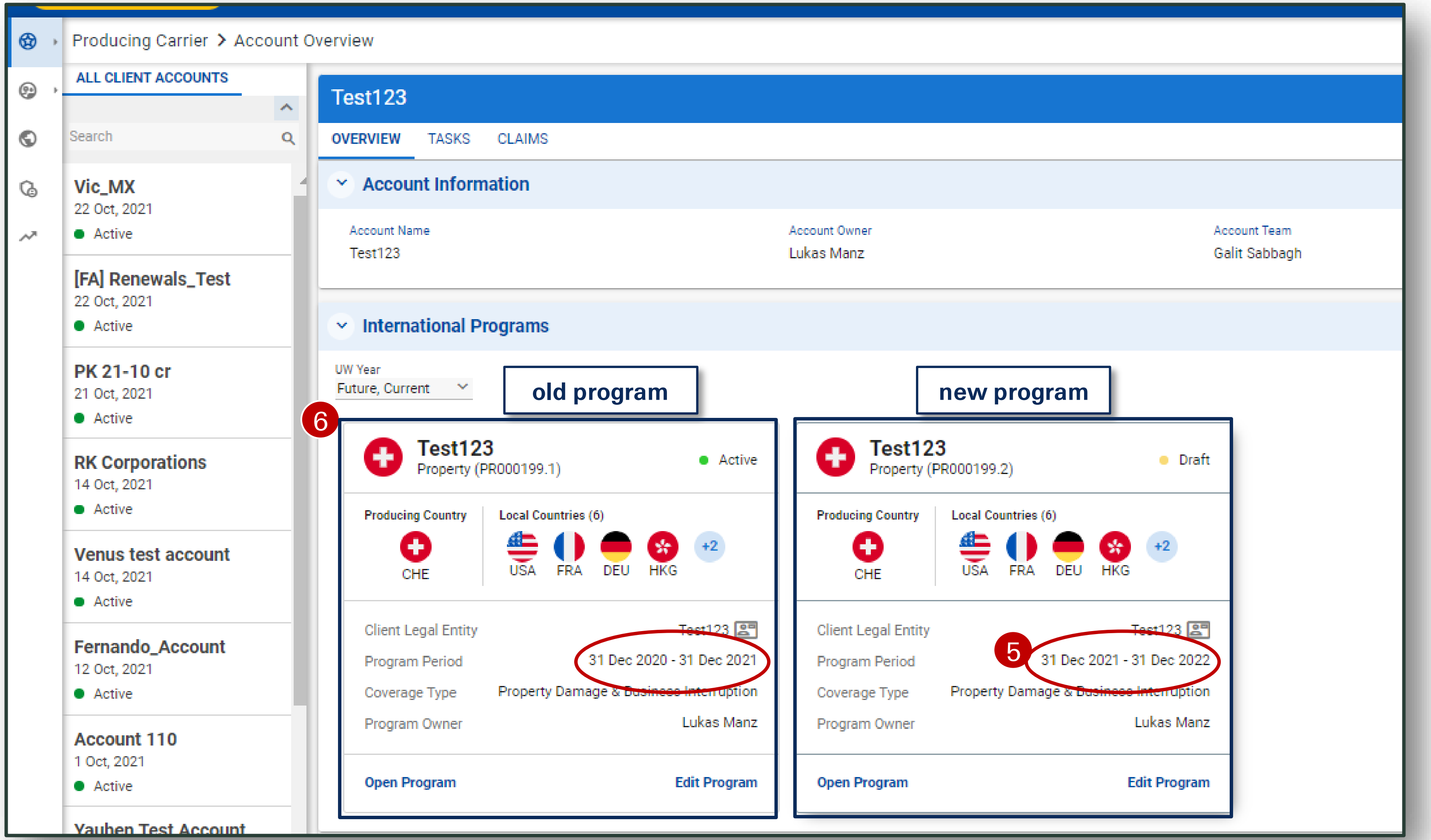
Your renewed program is created.

4 Renewal process will take only a few minutes.

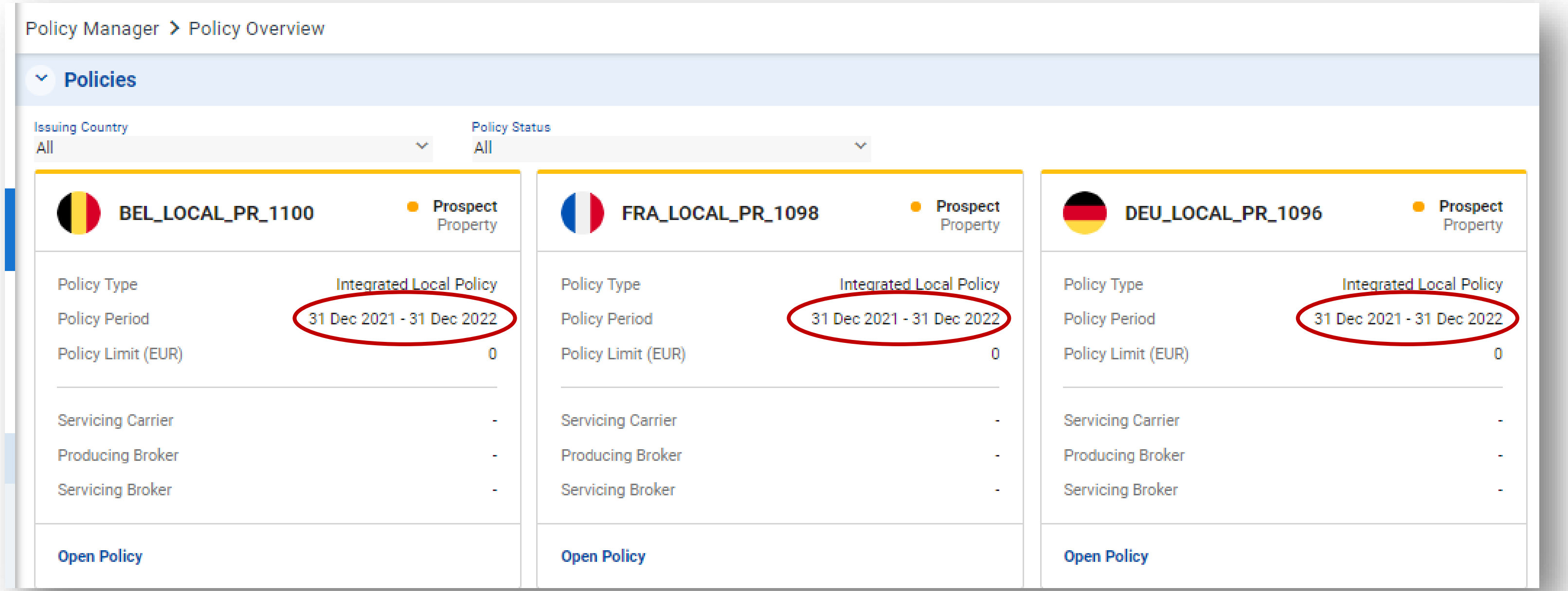
5 Your program has been renewed.

6 You will find now two programs: the current one & its renewal.





Renewals



Exposure, Structuring and all Policy information will be copied into the renewed program and ready to be reviewed.

Please be aware that Premium information is not automatically copied and the tasks must be retriggered.

Support Portal

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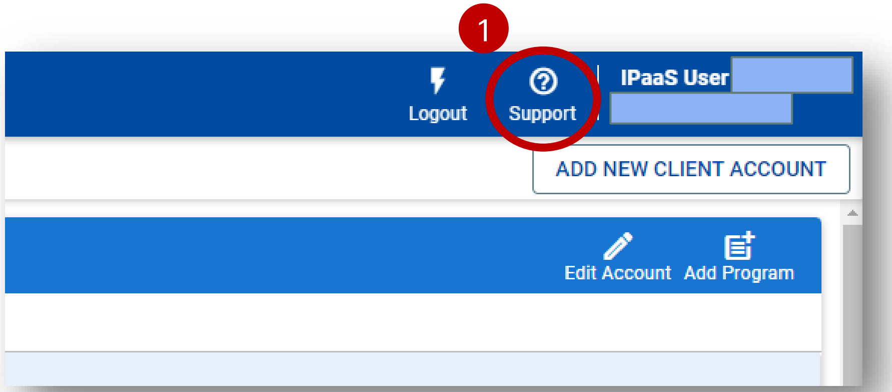
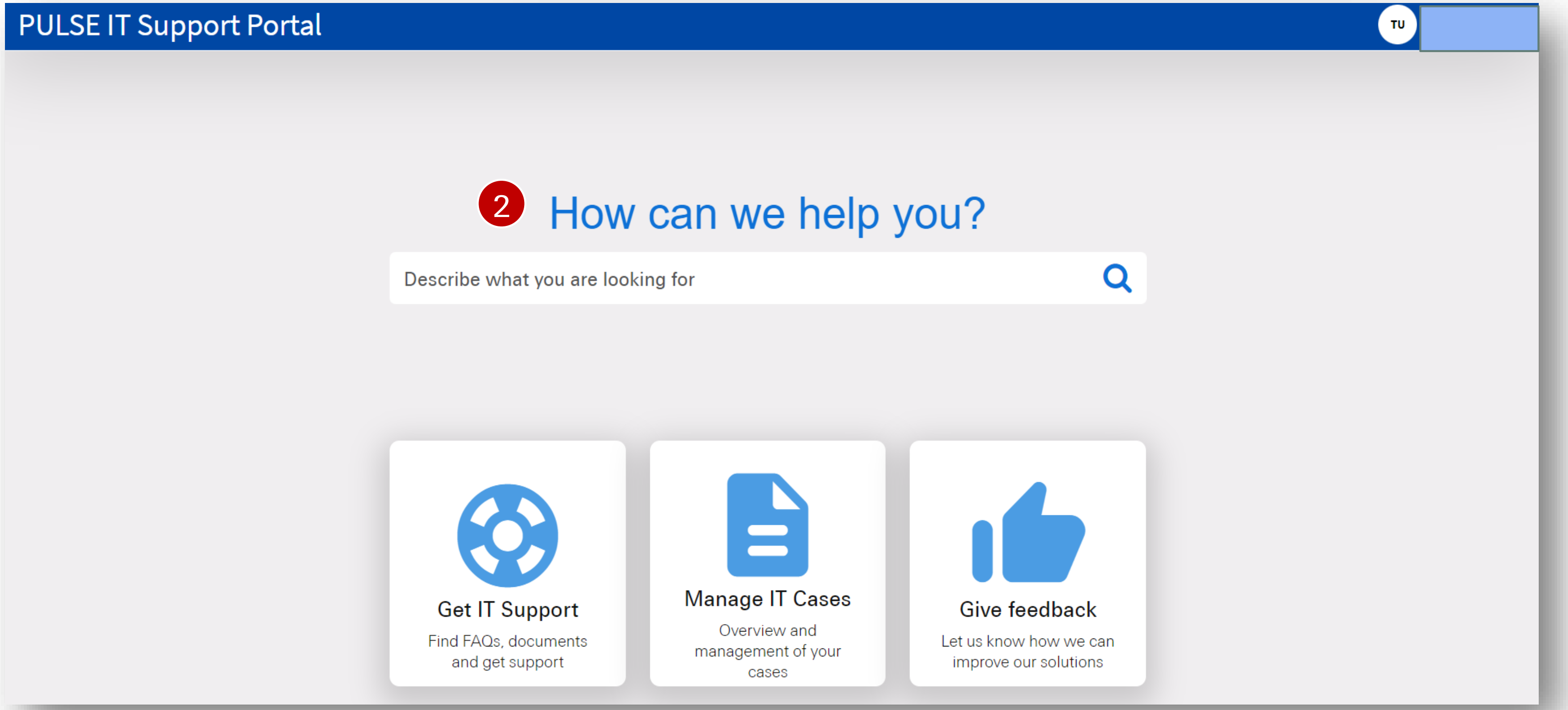
PULSE IT Support Portal:

1. Access to the support portal
2. Describe what you are looking for or access to the different sections of the portal

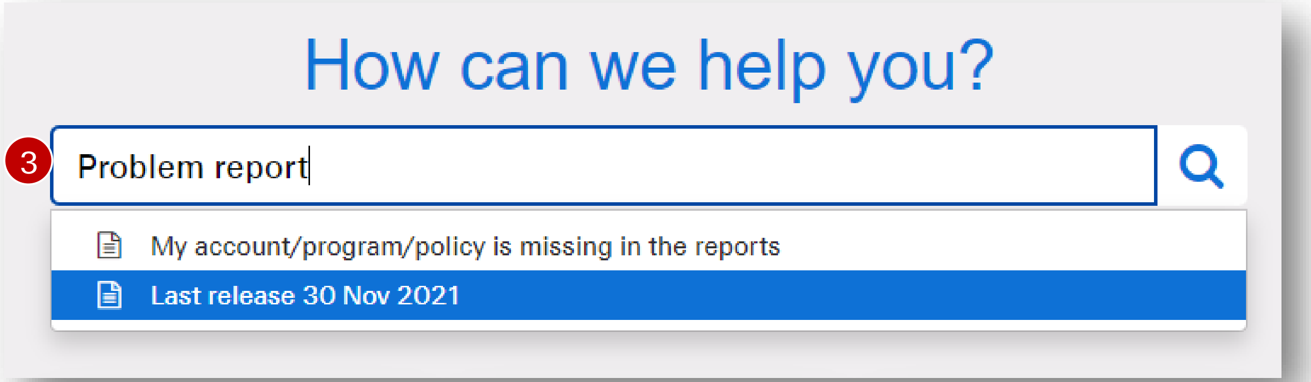


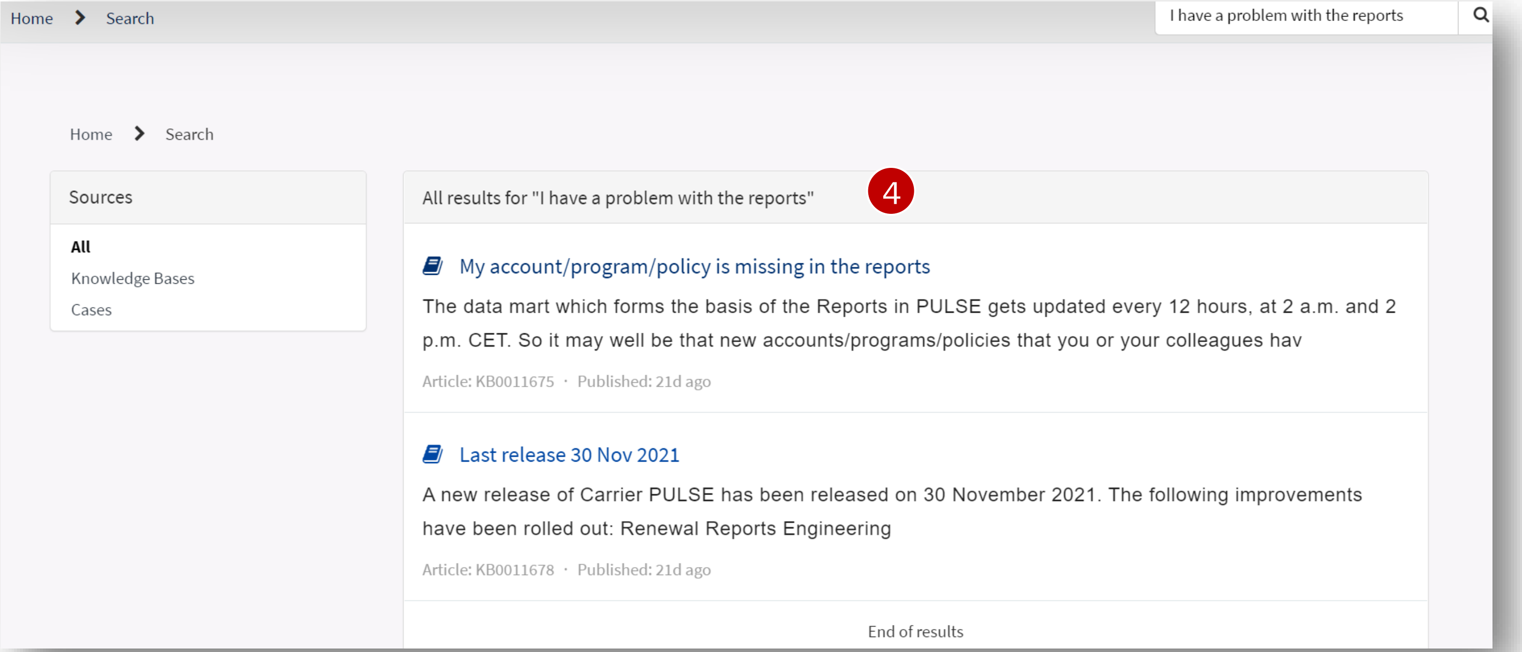


PULSE IT Support Portal:

3 Describe what you are looking for

4 Find articles with frequent questions asked by other users

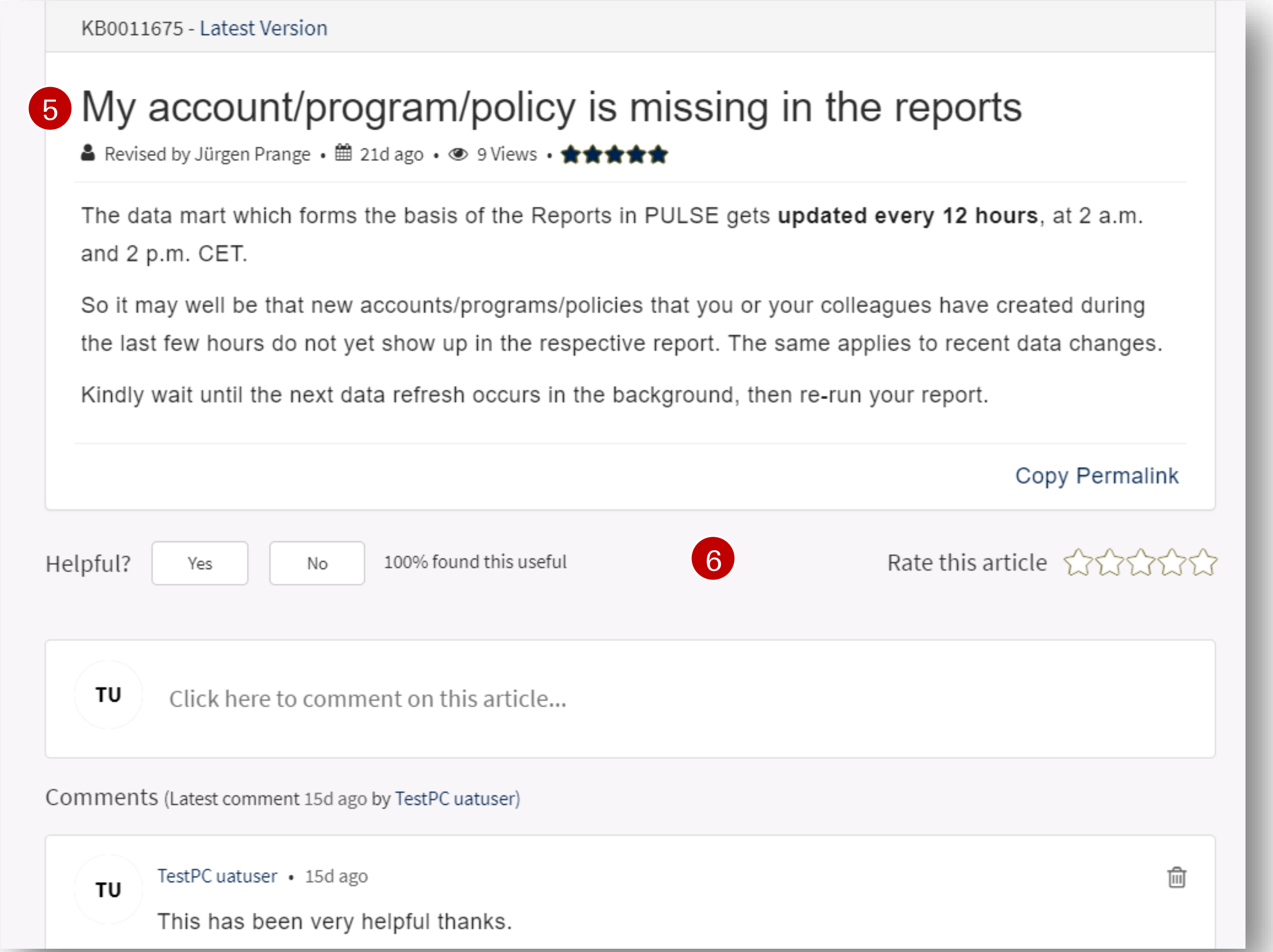




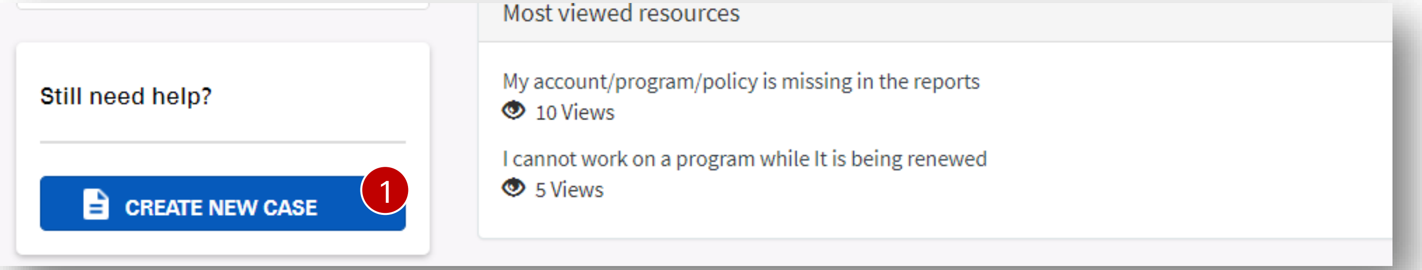
PULSE IT Support Portal:

5 Access to the article description

6 Rate the articles, add your comments and react to other users comments



PULSE IT Support Portal:

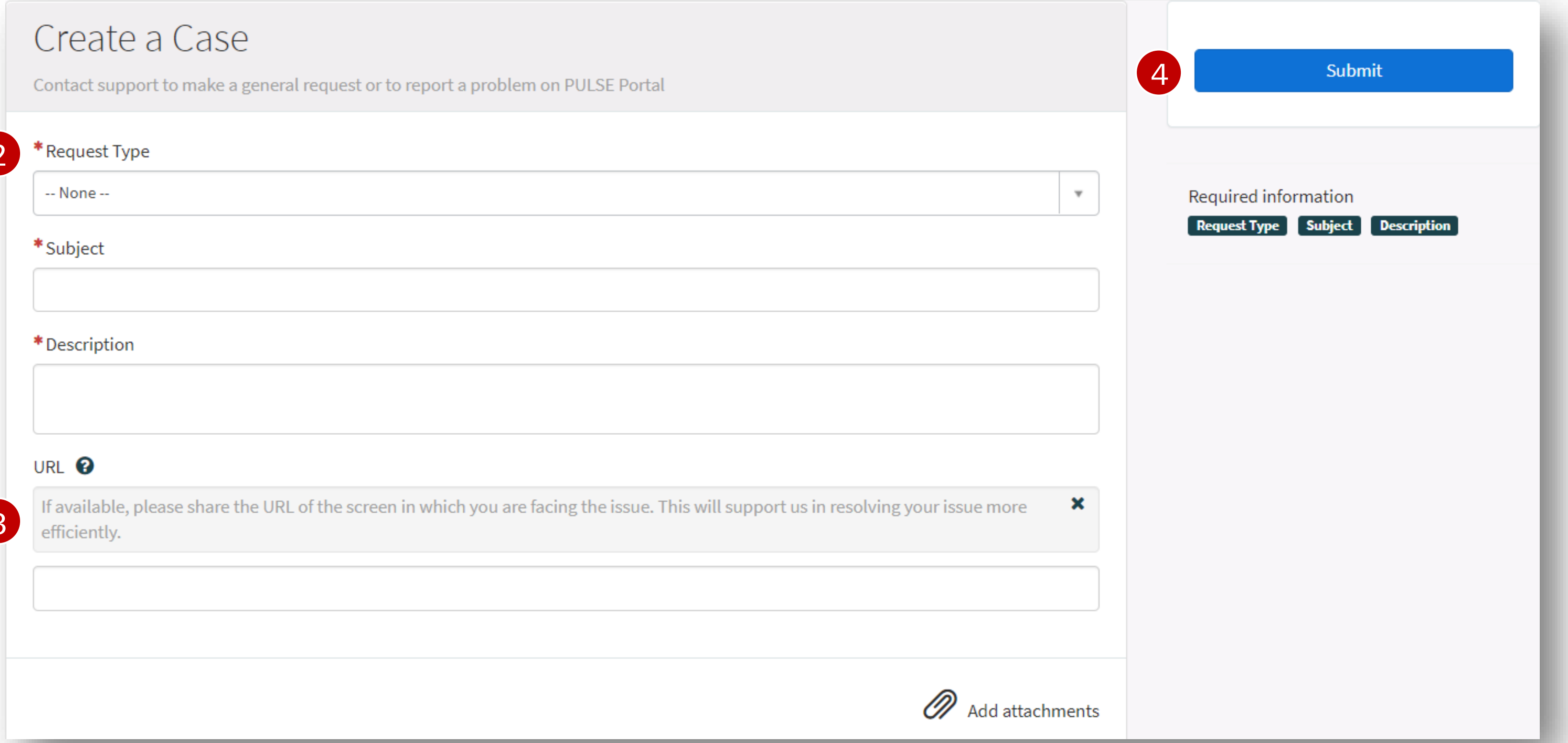


1 Do you still need help? Create a new case

2 Add the information regarding type of request, a subject and a description

3 If possible, add the the address of a web page (URL). You can also add attachements

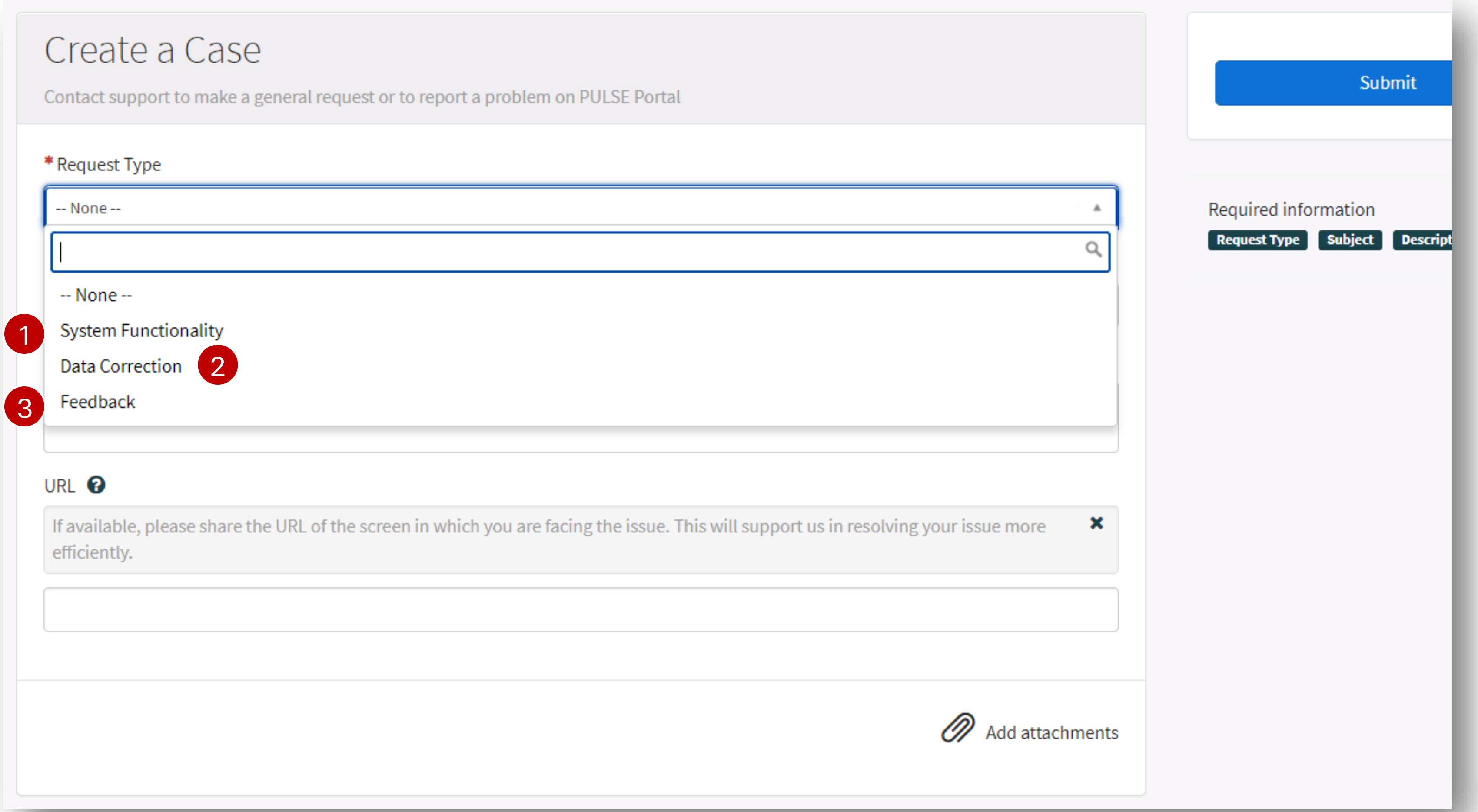
4 Submit your case! The Support team will be ready to assist you



PULSE IT Support Portal:

There are 3 types of request:

1. System Functionality: Cases related to the performance of the different functions of the platform
2. Data Correction: Any case related to data quality, performance, visibility etc. on PULSE platform.
3. Feedback: Let us know how can we improve our solutions. Raise your ticket here, or via main menu (see slide 9)



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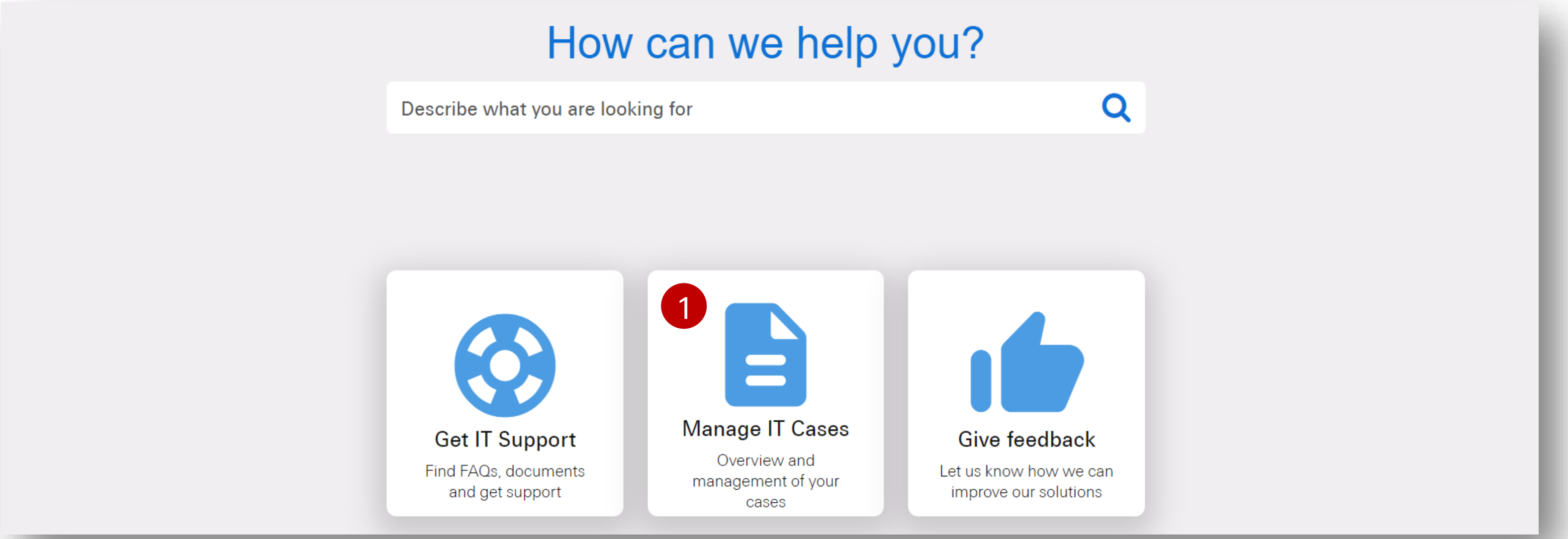
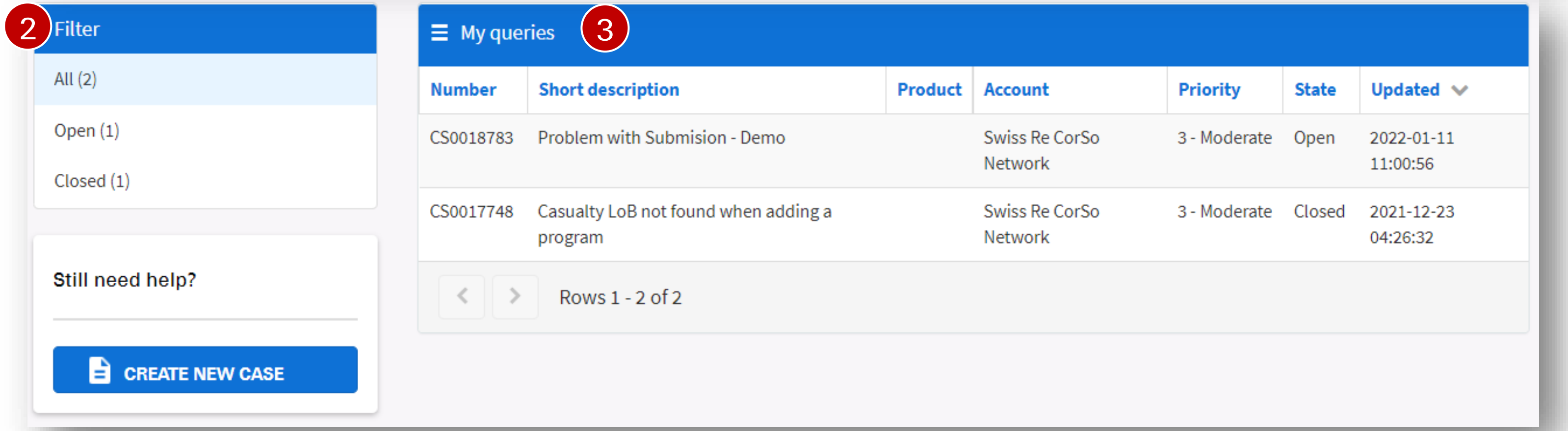
PULSE IT Support Portal:

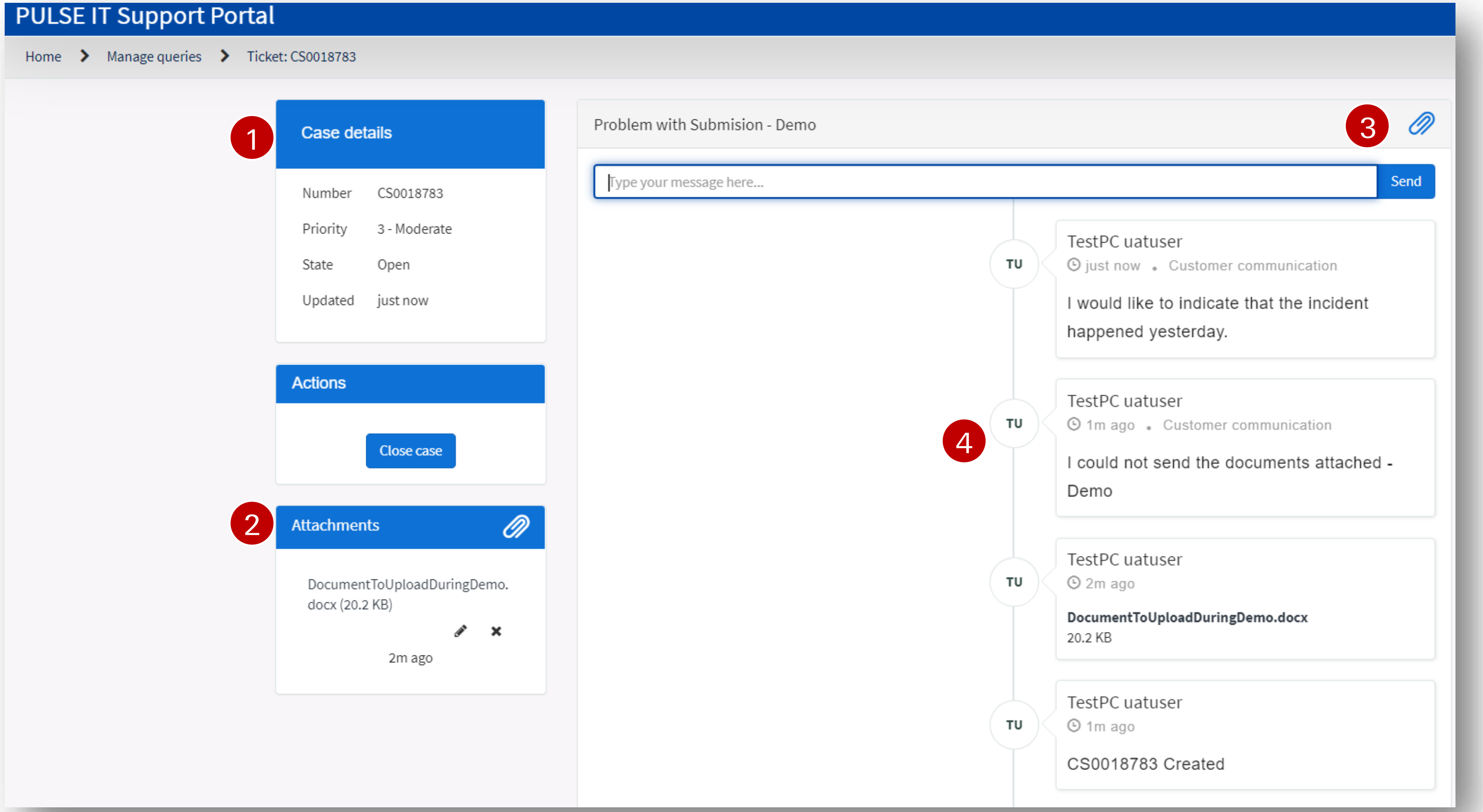
1. Get access to manage all your cases
2. Filter by open, closed or all cases
3. Overview all your cases and get access to them





PULSE IT Support Portal:

1. Case details and actions.
2. See attachments & edit them.
3. Communicate , provide updates, and add new attachments.
4. Overview of the history of the case.



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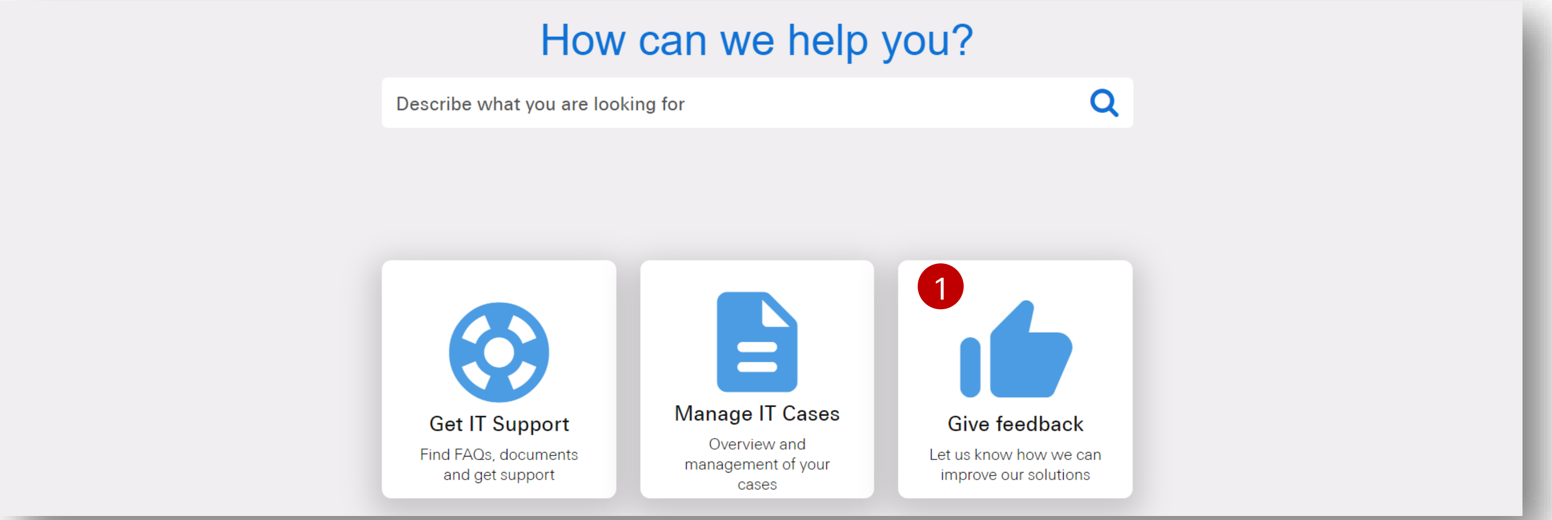
PULSE IT Support Portal:

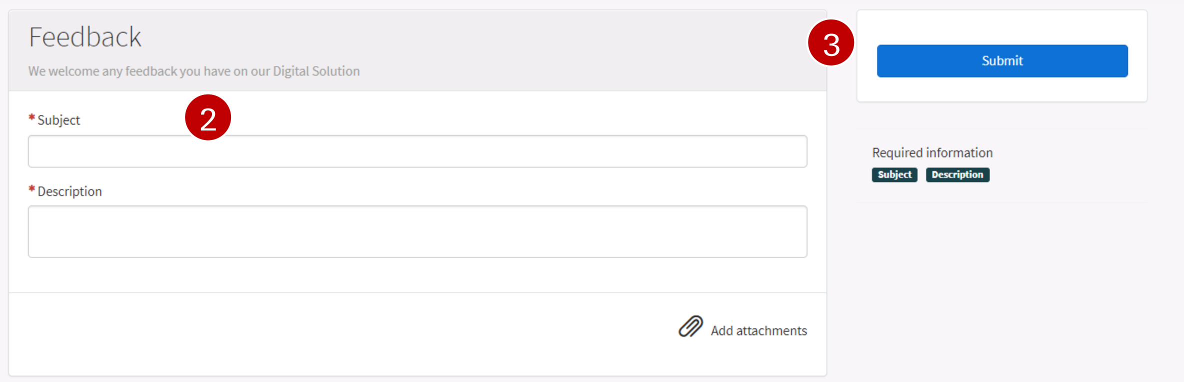
1 Get access to Give feedback session .

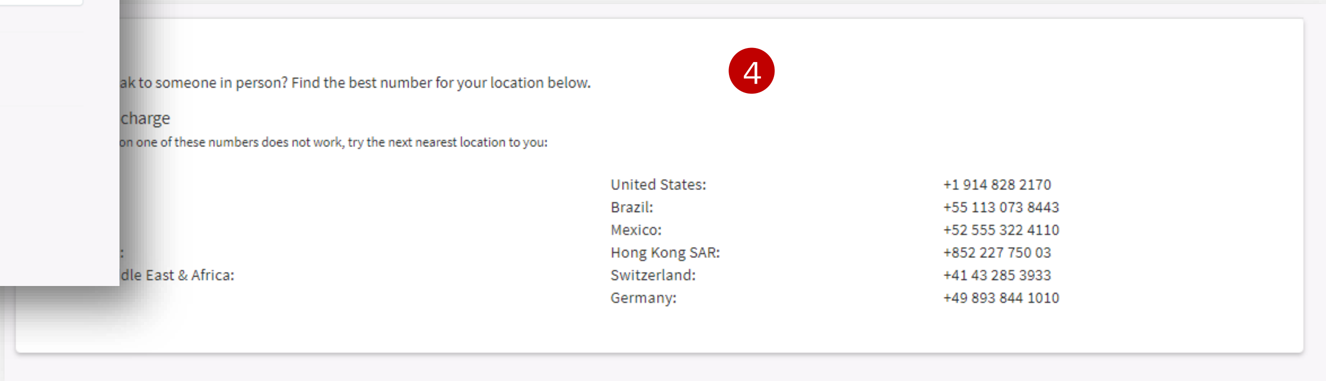
2 Describe your feedback and the subject. You can also add attachments.

3 Submit your feedback! The Support team will be looking forward to review your case.

4 If you need to speak with someone in person, find the numbers for each location

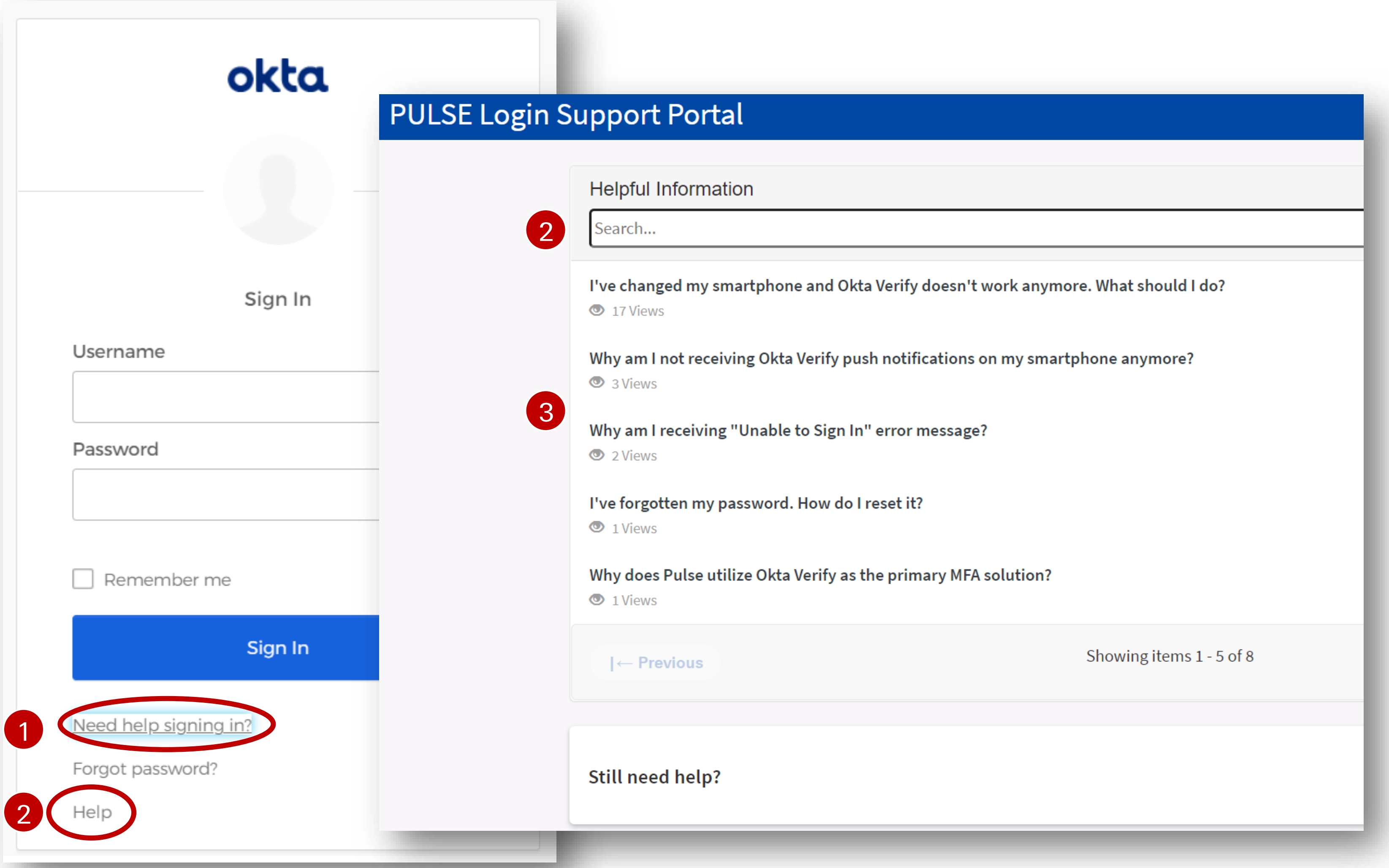






PULSE Login Support Portal:

1. Do you have problems to Sign In via Okta? Click on «Need help signing in?».
2. Click on «Help».
3. Describe what you are looking for.
4. Find articles with frequent questions asked by other users.

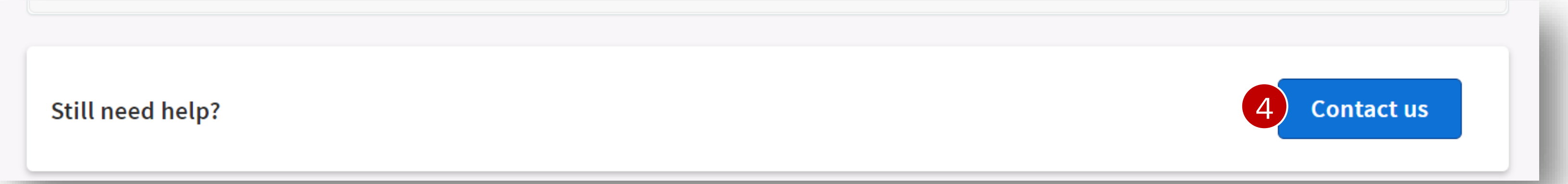


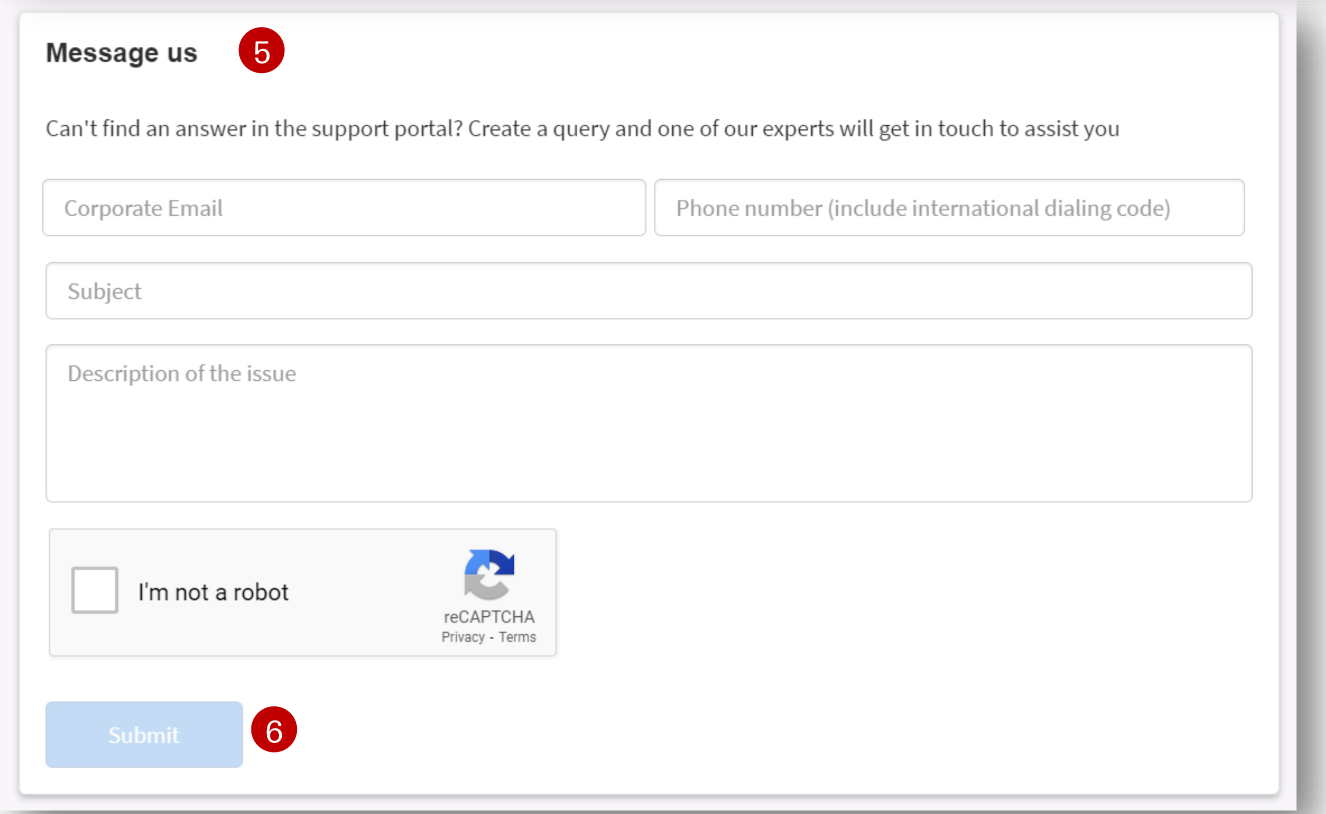
PULSE Login Support Portal:

4 Do you still need help? Click on Contact us and Message us!

5 Create a query by filling our form with your contact information and the description of your issue.

6 Click on Submit. One of our experts will get in touch to assist you.





Client Portal

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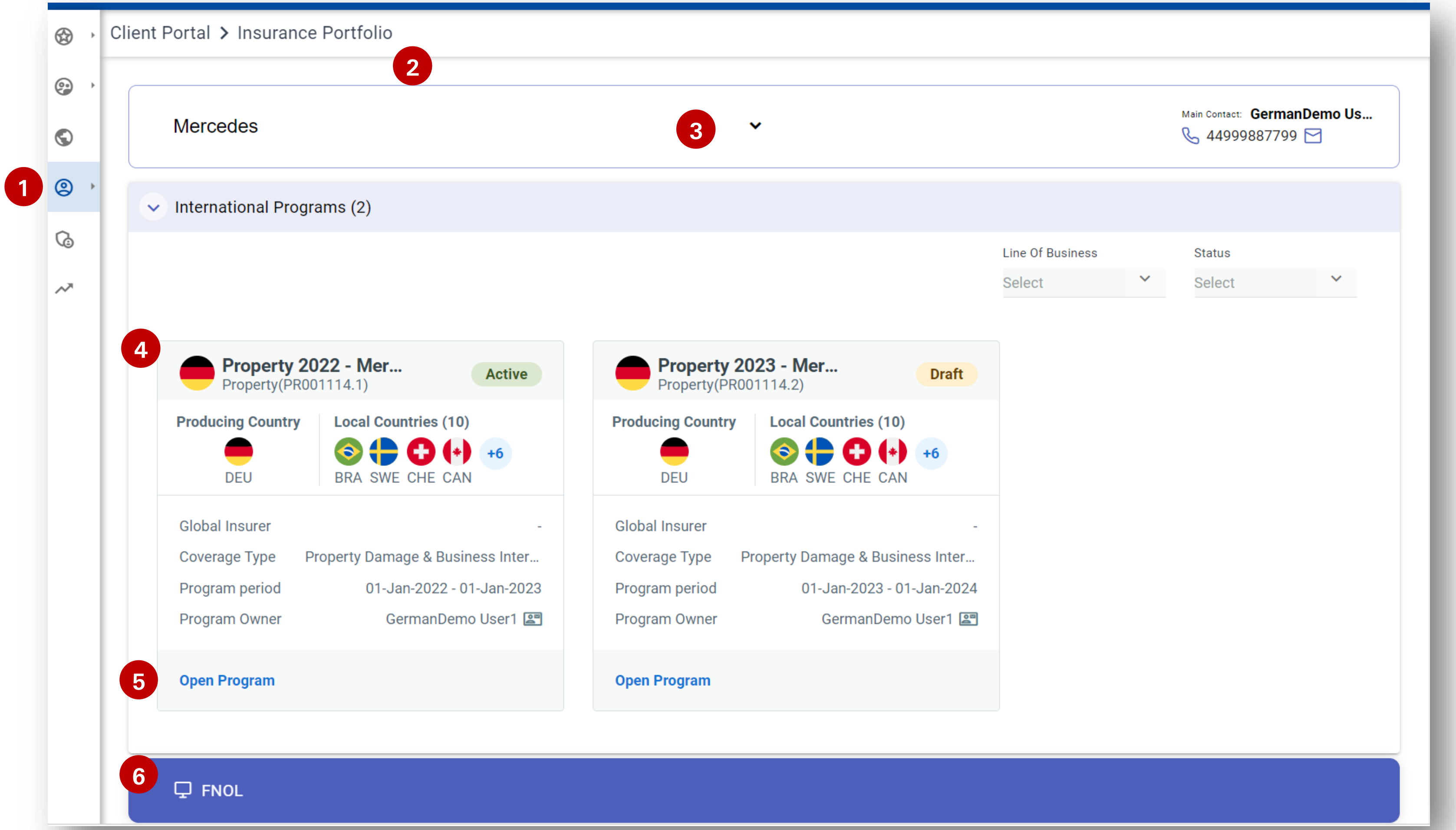
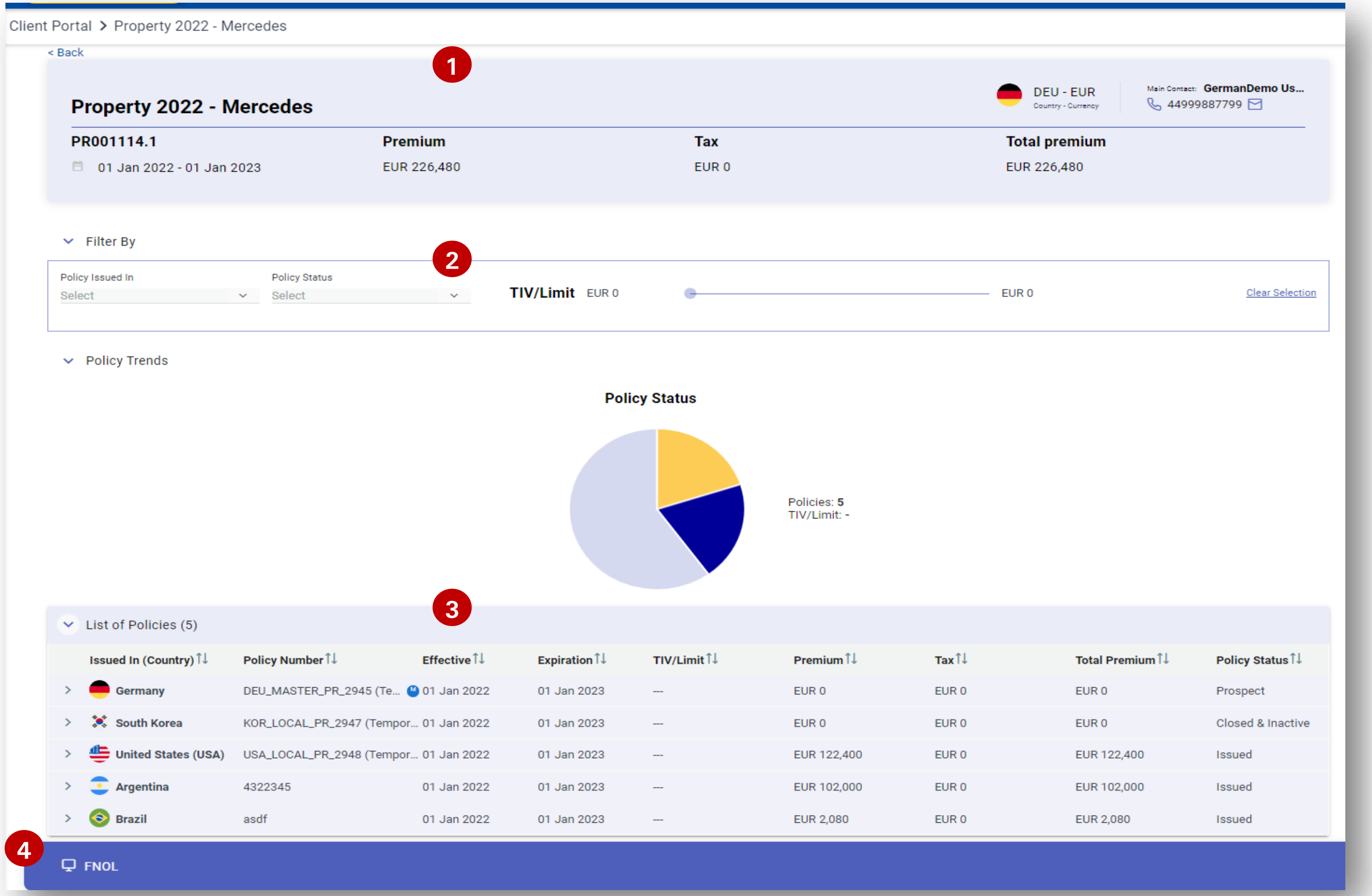
Client Portal: Share with your insureds selected program and policies information



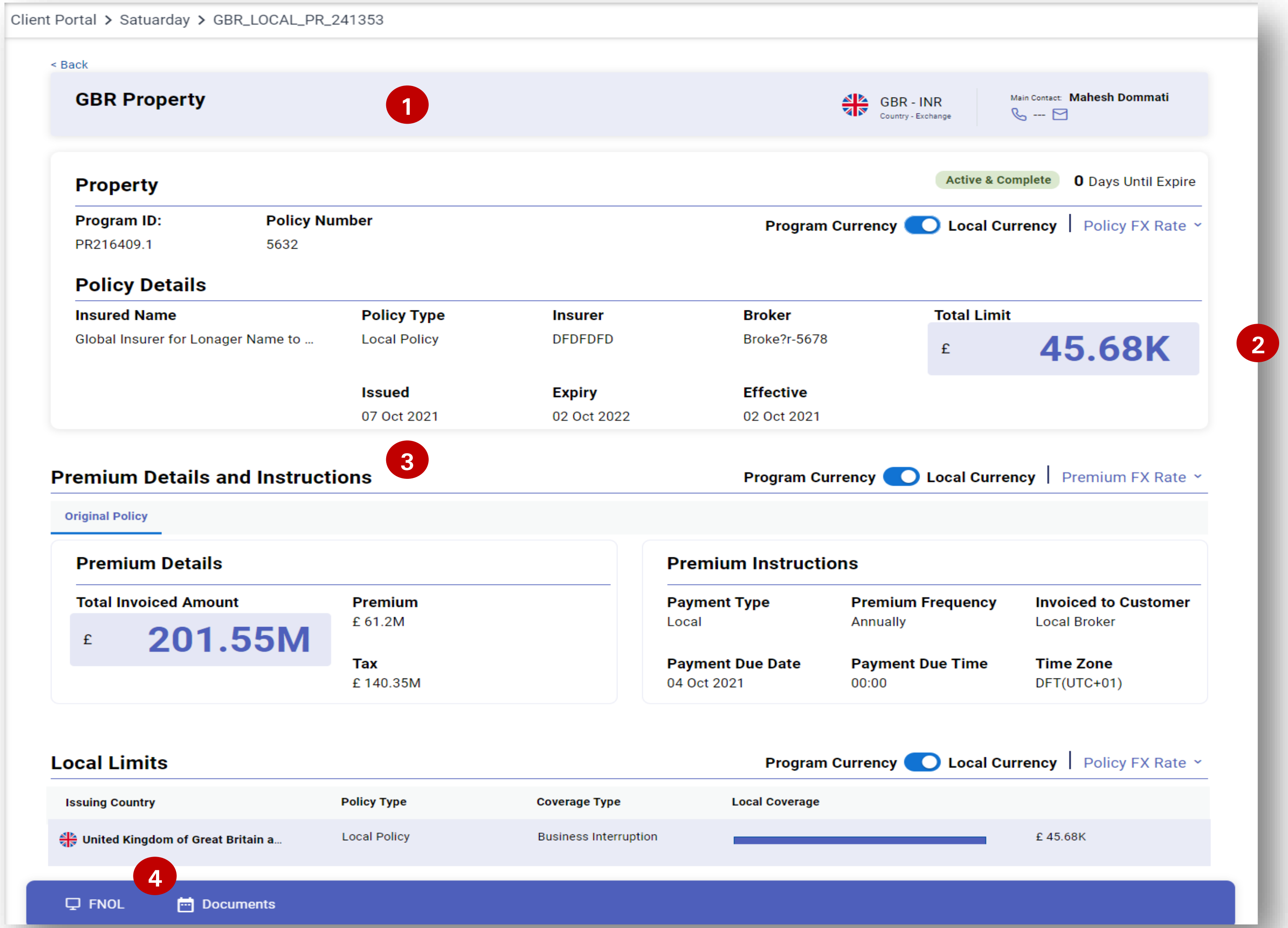
1. Access by clicking on Client Portal icon
2. Review the information that you are sharing with your clients
3. Select the client that you would like to see
4. Get a first overview of the program portfolio
5. Access to a Program information
6. Create a FNOL (First notice of loss)

Program overview



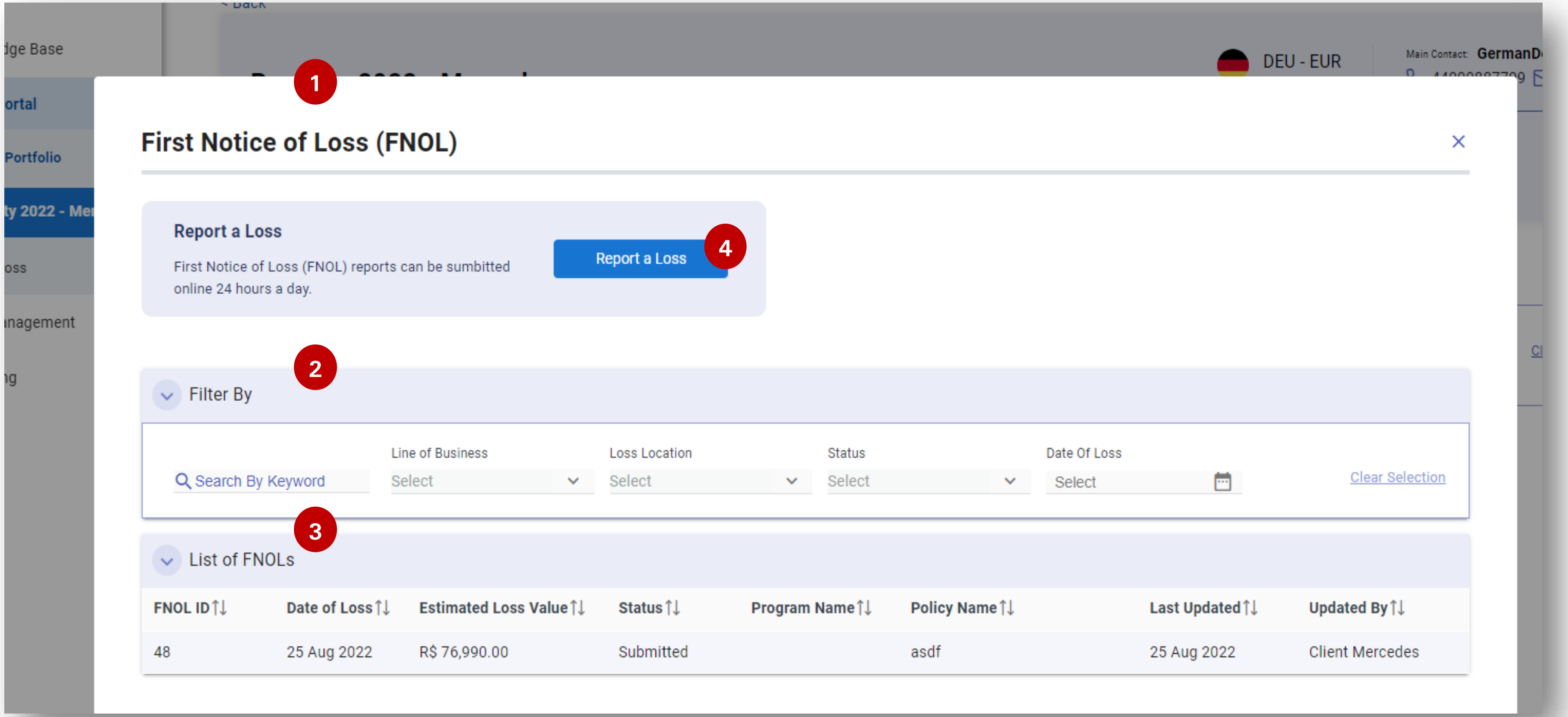
1. Overview of your program name, time cover, total premium, taxes, currency, and main contact
2. Apply filters to create charts to visualize policy trends of your program
3. Get a first overview of the policies portfolio of your program
4. Report a FNOL (First notice of loss)

Policy overview



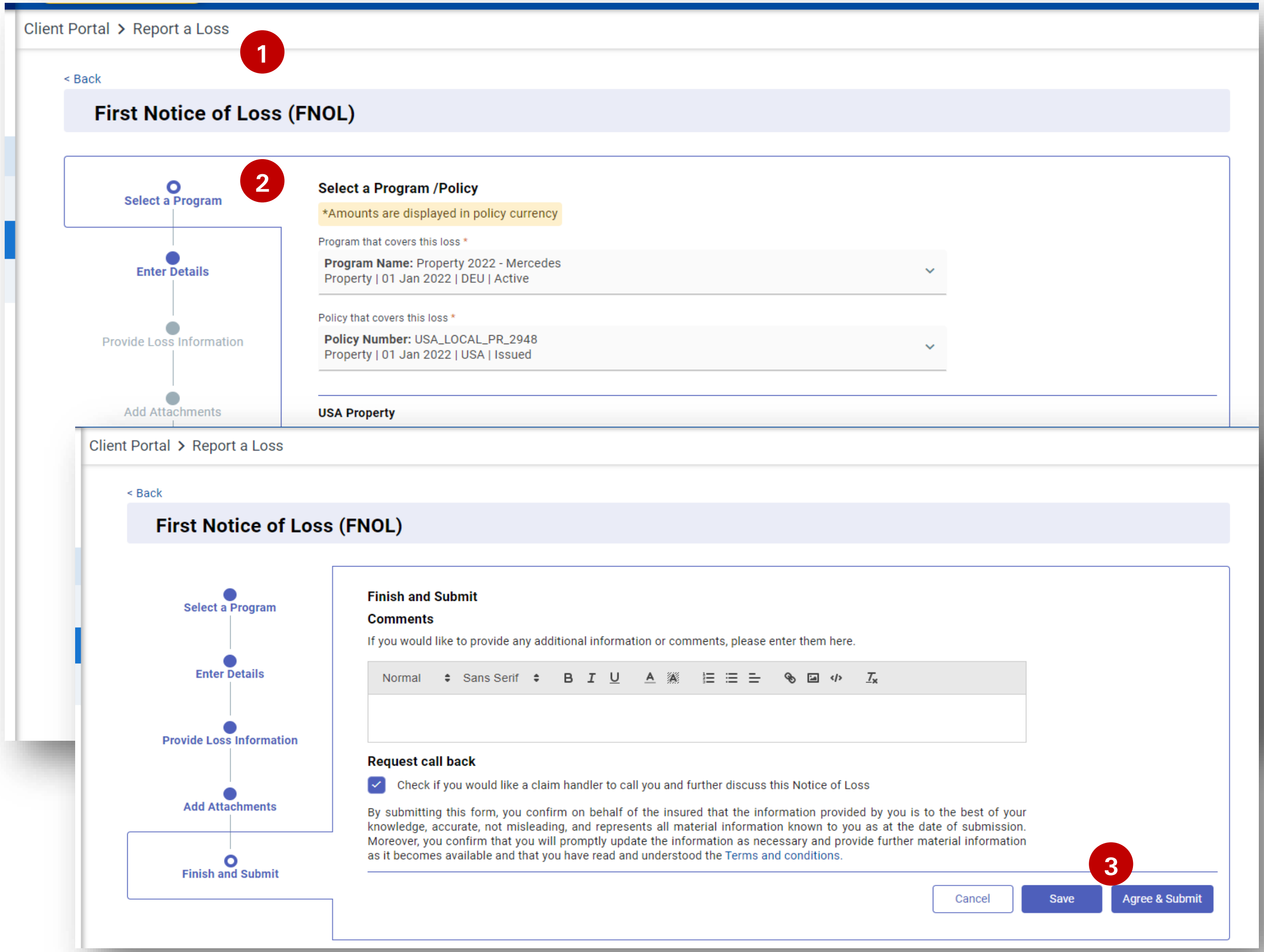
1. General overview of a policy
2. See the insured value, broker, insurer name etc.
3. Overview of premium details, instructions and limits
4. Directly report a FNOL for this policy and access to the documents folder

Report a first notice of loss (FNOL) for your clients



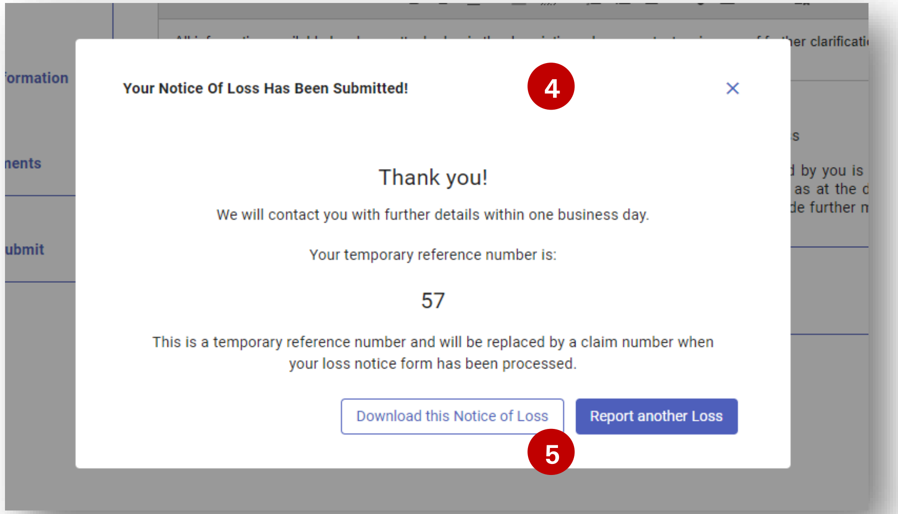
1. First notice of loss section
2. Apply filters to view your FNOL
3. List of FNOL created
4. Click on report a Loss

Report a first notice of loss (FNOL) for your clients



1. Start reporting the loss
2. Complete the different information sections: Select the policy, provide details of the loss, add attachments etc. Please note:

   - Move to the next section clicking on "continue" button
   - Only fields with a red * are mandatory
3. After completing the different sections, finish and submit your information
4. Your FNOL has been submitted
5. You can click and download a report on PDF of your reported loss



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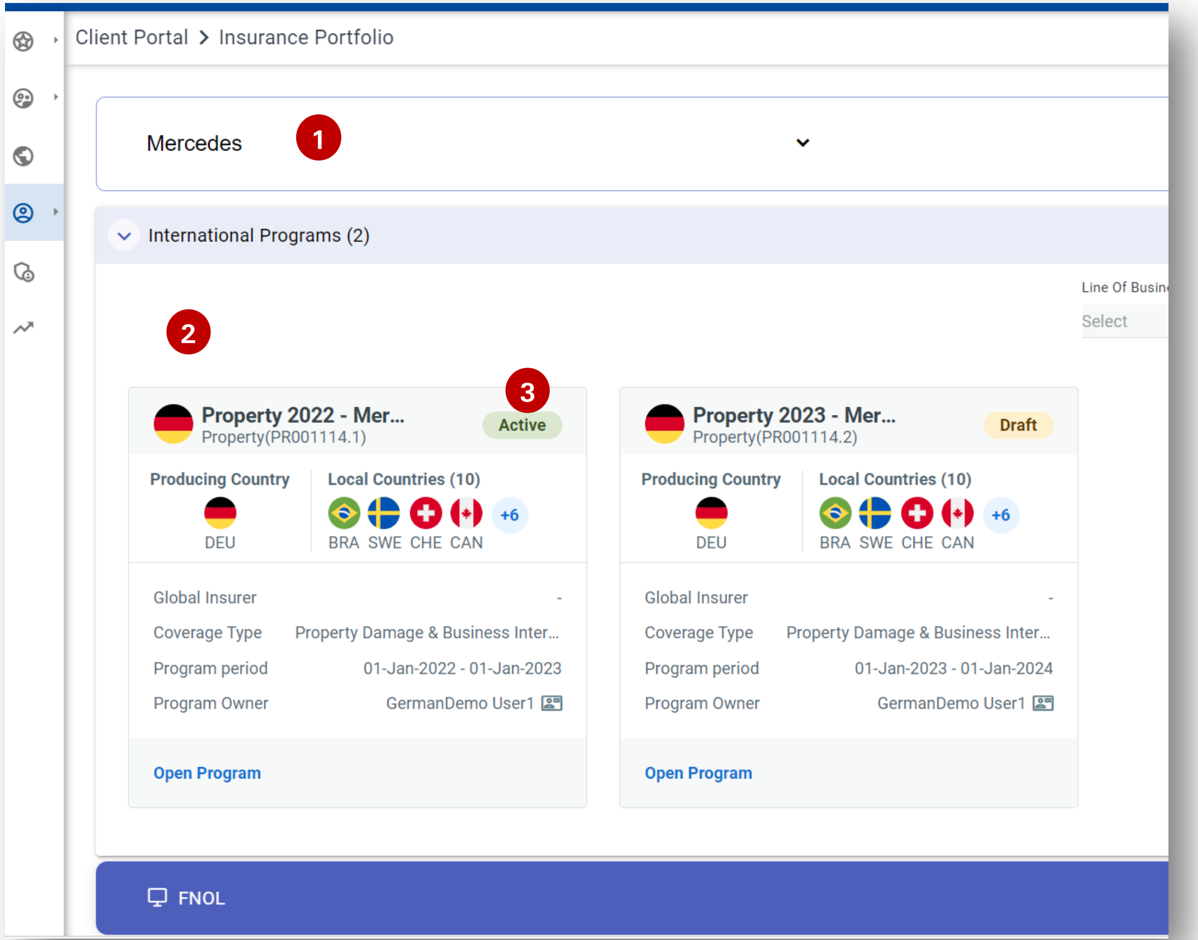
What information is shared with your insureds?



1. Insureds Portal users will be able to see only the information linked to the insured legal entity that they belong.

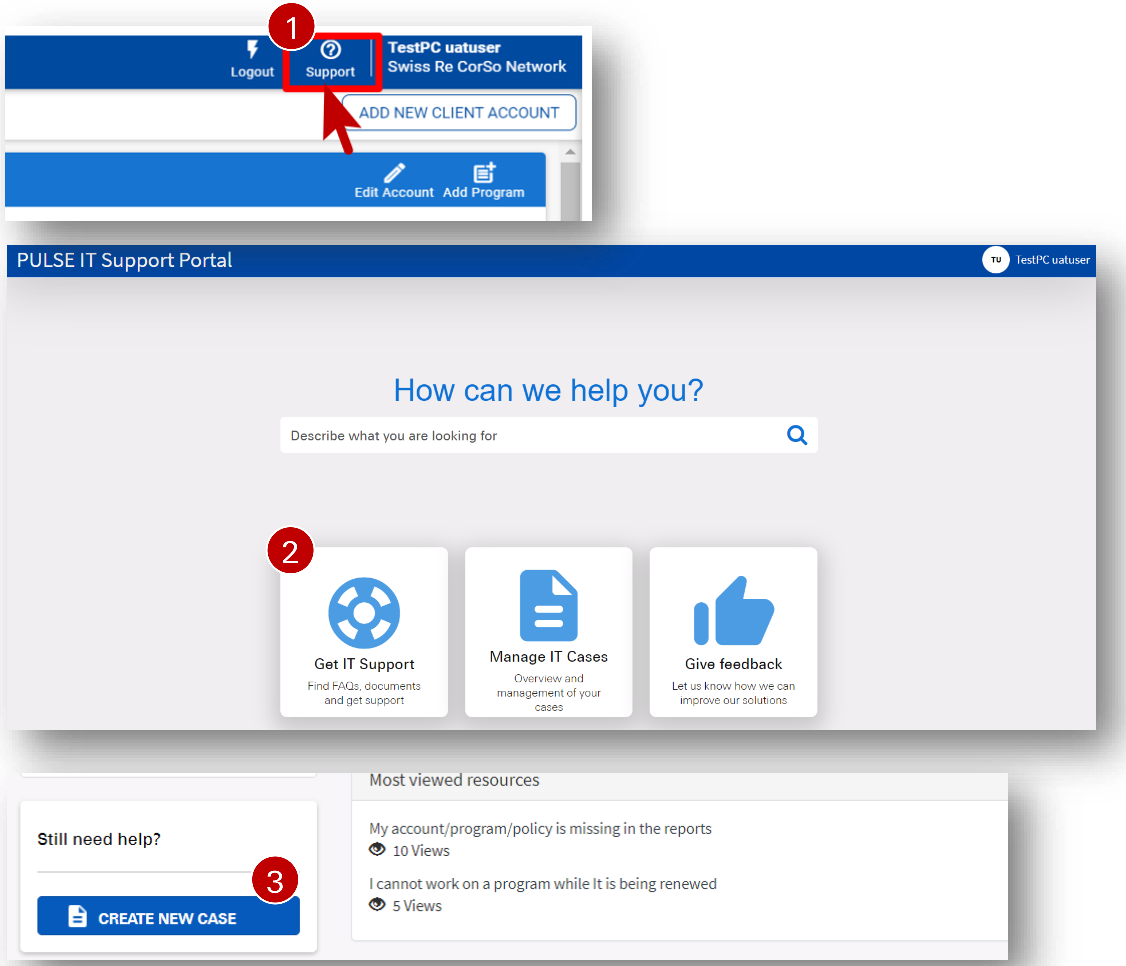
2. All Programs cards are shared, independently of their status.

3. Policies are share if their status is:
   - Local policy review task is completed
   - Policy status is set to "Issued"
   - Policy status is set to " Expired"
   - Policy status is set to " Active & Complete"
   - Master policy is always shared

Only documents attached to completed local policy review tasks are shared on the insureds portal.

Information is uploaded to the platform every 2 hours at fix times. (Example: at 14.00, 16.00...)

How to give access to your clients? Create a ticket via PULSE IT Support Portal



1. Click on Support Icon
2. Get IT Support
3. Create a new Case

Select ticket type "Add new insured portal user"

Legal notice