

# 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

The screenshot displays the user interface for a producing user. The top navigation bar includes the 'UAT Environment' (Knowledge Base), the current program details 'Program\_Property\_66 - PR006101.1' (Property Damage & Business Interruption), and the 'Program Team' section. A toolbar on the right contains 'Logout' and 'Support' links, along with a user profile icon and a 'Prospect' status indicator.

The left sidebar contains navigation options: 'Producing Carrier', 'Knowledge Base', 'User Management', 'Reporting', 'Program Overview', 'Program Documents', 'Program Tasks', 'Program Chat', 'Program Risk', 'Program Designer', and 'Policy Manager'. The 'Program Risk' section is currently selected.

The main content area shows the 'Exposure Summary' for the selected program. It includes a table of exposed countries with columns for 'Exposed Country', 'Insured Legal Entity', '# of Locations', 'Currency', 'FX Rate', 'Total PD', 'Total BI', 'Total TIV', and 'Action'. The table data is as follows:

Exposed Country	Insured Legal Entity	# of Locations	Currency	FX Rate	Total PD (in program currency)	Total BI (in program currency)	Total TIV (in program currency)	Action
Finland	Test_Regression66_06.04.2023	0	AZN	1	-	-	-	[Icons]
Australia	-	0	AUD	0.8750	-	-	-	[Icons]
France	-	0	EUR	0.5379	-	-	-	[Icons]
Georgia	-	0	GEL	1.4970	-	-	-	[Icons]
India	-	0	INR	48.0006	-	-	-	[Icons]
Monaco	-	0	EUR	0.5379	-	-	-	[Icons]
Qatar	-	0	QAR	2.1333	-	-	-	[Icons]

Additional interface elements include 'Show Values in:' (Program Currency (AZN) / Local Currency), 'UPLOAD LOCATIONS', 'DOWNLOAD LOCATIONS', and 'ALL LOCATIONS' buttons.

Knowledge Base

Selected program

Program modules

Program header incl. details

Toolbar (Logout, Support)

User profile

Program status



# 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

The screenshot displays the 'Account Overview' interface for a 'Producing Carrier'. It features two main tabs: 'MY ACCOUNTS' (highlighted with a red circle 1) and 'ALL ACCOUNTS' (highlighted with a red circle 2). The left sidebar lists several accounts, including 'Release 68 testing', 'TNCAUSOneform', 'TNCProgramAUS23052023', 'Test 15/05', 'Testing 12/05', 'UAT Exposure Issue', and 'UAT Sanity 03/05'. The main content area shows the 'Release 68 testing' account details, including 'Account Information' (Account Name, Account Owner, Account Team, Client Contact, Account Status) and 'International Programs' (UW Year, Future, Current). Three program cards are displayed: 'E&C Engineering & Construction (EC006852.2) Draft', 'E&C Engineering & Construction (EC006852.1) Active & Complete', and 'Property Property (PR006817.2) Draft'. Each card shows 'Producing Country' (NLD), 'Local Countries' (DEU, BEL), 'Client Legal Entity' (Release 68 testing), 'Program Period', 'Coverage Type' (Material Damage & Time Element), and 'Program Owner'. Buttons for 'Open Program' and 'Edit Program' are visible at the bottom of each card.

# 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

The screenshot shows the 'Account Overview' page for 'Release 68 testing'. The interface is divided into a left sidebar and a main content area. The sidebar lists several accounts, with 'Release 68 testing' selected. The main content area has three tabs: 'OVERVIEW', 'TASKS', and 'CLAIMS'. The 'OVERVIEW' tab is active and contains two main sections: 'Account Information' and 'International Programs'. The 'Account Information' section displays fields for Account Name, Account Owner, Account Team, Client Contact, and Account Status. The 'International Programs' section shows a list of programs with details for each, including Producing Country, Local Countries, Client Legal Entity, Program Period, Coverage Type, and Program Owner. Red circles and arrows highlight the 'Account Information' and 'International Programs' sections in the main content area, and a red circle highlights the 'Release 68 testing' account in the sidebar.

**Account Information**

Account Name	Account Owner	Account Team	Client Contact	Account Status
Release 68 testing			Pritam Testing	Active

**International Programs**

Program Name	Producing Country	Local Countries	Status
E&C Engineering & Construction (EC006852.2)	NLD	DEU, BEL	Draft
E&C Engineering & Construction (EC006852.1)	NLD	DEU, BEL	Active & Complete
Property Property (PR006817.2)	NLD	AUT, CHE, USA, DEU	Draft



# 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

Producing Carrier > Account Overview

MY ACCOUNTS ALL ACCOUNTS

Search

Release 68 testing  
2 Jun, 2023  
Active

TNCAUSOneform  
23 May, 2023  
Active

TNCProgramAUS23052023  
23 May, 2023  
Active

Testing 12/05  
12 May, 2023

Release 68 testing

OVERVIEW TASKS CLAIMS

Group By: Group By, Initiated By: Initiated By, Quick Search

CLEAR FILTER REFRESH TASKS

Program Name	LOB	Country	Servicing Office	Task Name	Received	Due Date	Status	Team	Assigned
E&C	Engineering & C...	Germany	Swiss Re CorSo...	Endorsement R...	7 Jun, 2023	9 Jun, 2023	New	GLOBAL SDM	
E&C	Engineering & C...	Germany	Swiss Re CorSo...	Endorsement R...	7 Jun, 2023	9 Jun, 2023	Completed	GLOBAL SDM	
Property	Property	India	Swiss Re CorSo...	policyReview	6 Jun, 2023	13 Jun, 2023	Accepted	GLOBAL SDM	
Property	Property	India	Swiss Re CorSo...	Policy Issuance	6 Jun, 2023	27 Jun, 2023	New	GLOBAL SDM	
Property	Property	India	Swiss Re CorSo...	policyrenewal	6 Jun, 2023	27 Jun, 2023	New	GLOBAL SDM	
Property	Property	India	Swiss Re CorSo...	policyPremium...	6 Jun, 2023	29 Aug, 2023	New	GLOBAL SDM	

➡ To know more about tasks, [click here](#) and [here](#)

Property - PR006817.1\_PRM\_IND\_100002840 - Premium Collection

Due on: 29 Aug, 2023

Premium Collection

PRM - 100002840

New Action Required By: [Redacted]

Kicked Off Date: 6 Jun, 2023 Due On: 29 Aug, 2023

Originator: Roopa Kadiyamkulath Task Owner: [Redacted]

Details

Program Name: Property Line Of Business: Property Local Client: [Redacted]

Program ID: PR006817.1 Producing Office: [Redacted] Local Carrier Team: [Redacted]

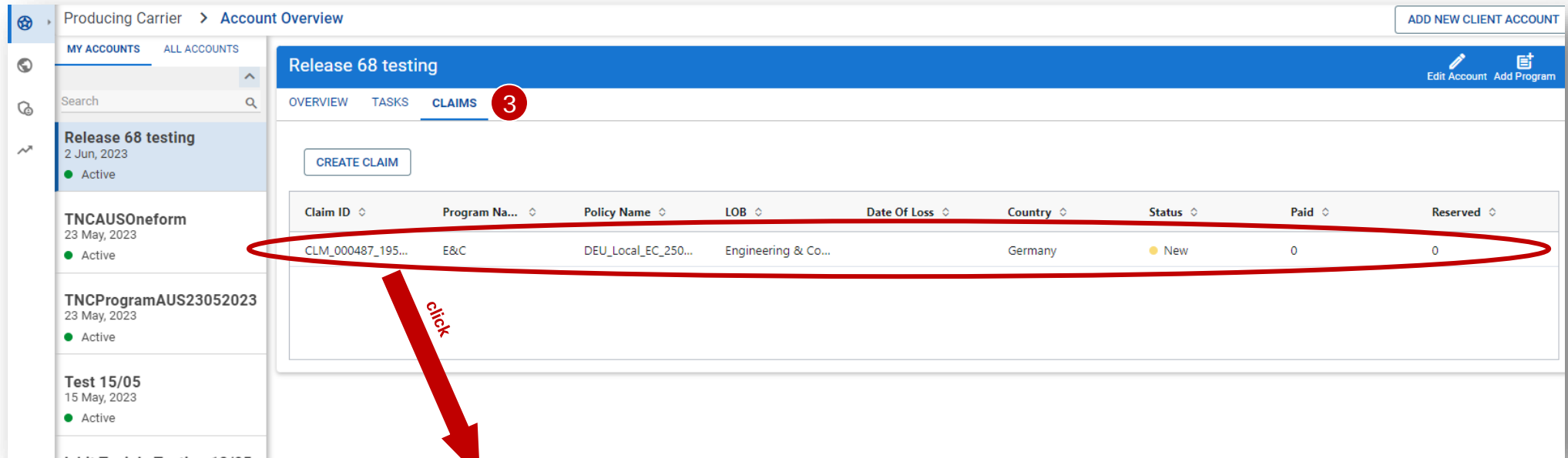
Policy ID: IND\_Local\_PR\_25155 Country Of Risk: India Issuing Entity: [Redacted]

Description

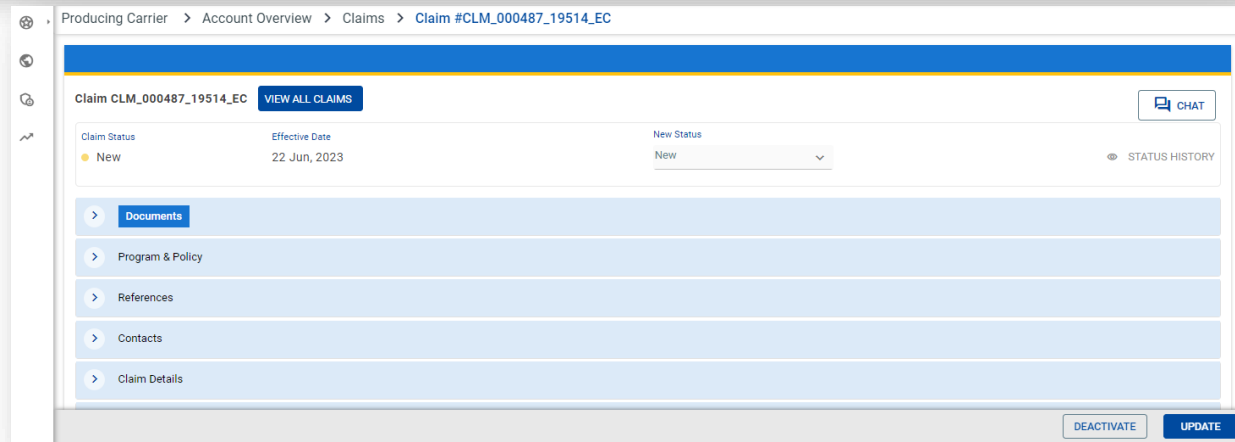
# Account Overview – Overview, Tasks, Claims

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](#)



# Program Overview – Create or Edit an Account

The screenshot displays the 'Release 68 testing' account overview page. The page is divided into several sections:

- Account Information:** Shows the account name 'Release 68 testing', account owner, account team, client contact 'Pritam Testing', and account status 'Active'.
- International Programs:** Shows a dropdown for 'UW Year' set to 'Future, Current'.
- Programs:** Three program cards are visible:
  - E&C (Engineering & Construction):** EC006852.2, Draft status. Producing Country: NLD. Local Countries: DEU, BEL. Program Period: 03 Jun 2024 - 04 Jun 2025. Coverage Type: Material Damage & Time Element.
  - E&C (Engineering & Construction):** EC006852.1, Active & Complete status. Producing Country: NLD. Local Countries: DEU, BEL. Program Period: 03 Jun 2023 - 03 Jun 2024. Coverage Type: Material Damage & Time Element.
  - Property (PR006817.2):** Draft status. Producing Country: NLD. Local Countries: AUT, CHE, USA, DEU, +2. Program Period: 02 Jun 2024 - 03 Jun 2025. Coverage Type: Property Damage & Business Interruption.

Red circles with numbers 1 and 2 highlight the 'ADD NEW CLIENT ACCOUNT' button and the 'Edit Account' button respectively.

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

Producing Carrier > Add New Client Account

**3** **Client Account Information**

Account Status: Active  
Account Since: 20 Jun 2023

Account Name \*

Account Owner \*

Account Team \*

Comments

**4** **Client Contact**

Client Contact Name \*

Address Line 1 \*

Address Line 2

City State

Zip Code \* Country \*

Email

Phone

CANCEL SUBMIT & ADD PROGRAM SUBMIT

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

The screenshot displays the 'Account Overview' page for 'Release 68 testing'. The page is divided into several sections:

- Header:** 'Producing Carrier > Account Overview' and 'ADD NEW CLIENT ACCOUNT' button.
- Account Information:** A table with columns: Account Name (Release 68 testing), Account Owner (redacted), Account Team (redacted), Client Contact (Pritam Testing), and Account Status (Active).
- International Programs:** A dropdown menu for 'UW Year' set to 'Future, Current'.
- Program List:** Three program cards are shown:
  - E&C Engineering & Construction (EC006852.2):** Draft status.
  - E&C Engineering & Construction (EC006852.1):** Active & Complete status.
  - Property Property (PR006817.2):** Draft status.

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

The screenshot shows the 'Add Program' form for a 'Producing Carrier'. The form is divided into three main sections, each highlighted with a red circle and a number:

- 3 Program - Overview:** This section contains fields for 'Prospect' (with a 'Created Date' of 20 Jun 2023, 14:36, GMT+1), 'Program Name\*' (Casualty\_2.0), 'Program Owner\*', 'Program Team\*', 'Line of Business\*' (Casualty), 'Coverage Type\*' (Public/General Liability), 'Program Currency\*' (CHF), 'Industry Classification', 'Inception Date\*' (21 Jun 2023), 'Inception Time\*' (00:00), 'Time Zone\*' (ACT (UTC-05)), 'Expiration Date\*' (21 Jun 2024), 'Expiration Time\*' (00:00), and 'Time Zone\*' (ACT (UTC-05)). There is also a 'Comments' text area at the bottom.
- 4 Insured legal Entity:** This section includes 'Headquarter Country\*', 'Legal Entity\*' (Release 68 testing), and 'Address'.
- 5 Program - Client Contact:** This section includes 'Client Contact\*', 'Address', 'Email', and 'Phone'. A 'VIEW ADDITIONAL CONTACTS' button is located at the bottom of this section.



# Program Overview – Edit a Program

23 May, 2023  
● Active

**TNCProgramAUS23052023**  
23 May, 2023  
● Active

**Test 15/05**  
15 May, 2023  
● Active

**Testing 12/05**  
12 May, 2023  
● Active

**UAT Exposure Issue**  
8 May, 2023  
● Active

**UAT Sanity 03/05**  
3 May, 2023  
● Active

**International Programs**  
UW Year: Future, Current

**E&C** Engineering & Construction (EC006852.2) ● Draft  
Producing Country: NLD  
Local Countries (2): DEU, BEL  
Client Legal Entity: Release 68 testing  
Program Period: 03 Jun 2024 - 04 Jun 2025  
Coverage Type: Material Damage & Time Element  
Program Owner: [Redacted]  
**Open Program** **1 Edit Program**

**E&C** Engineering & Construction (EC006852.1) ● Active & Complete  
Producing Country: NLD  
Local Countries (2): DEU, BEL  
Client Legal Entity: Release 68 testing  
Program Period: 03 Jun 2023 - 03 Jun 2024  
Coverage Type: Material Damage & Time Element  
Program Owner: [Redacted]  
**Open Program** **Edit Program**

**Property** (PR006817.2) ● Draft  
Producing Country: NLD  
Local Countries (6): AUT, CHE, USA, DEU  
Client Legal Entity: Release 68 testing  
Program Period: 02 Jun 2024 - 03 Jun 2025  
Coverage Type: Property Damage & Business Interruption  
Program Owner: [Redacted]  
**Open Program** **Edit Program**

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

Producing Carrier > Add Program

**Program - Overview**  
Prospect: Created Date: 20 Jun 2023, 14:36, GMT+1  
Program Name: Casualty\_2.0  
Program Owner: [Redacted]  
Program Team: [Redacted]  
Line of Business: Casualty  
Coverage Type: Public/General Liability  
Program Currency: CHF  
Industry Classification: [Redacted]  
Inception Date: 21 Jun 2023  
Inception Time: 00:00  
Time Zone: ACT (UTC-05)  
Expiration Date: 21 Jun 2024  
Expiration Time: 00:00  
Time Zone: ACT (UTC-05)  
Comments: [Redacted]

**Insured legal Entity**  
Headquarter Country: [Redacted]  
Legal Entity: [Redacted]  
Release 68 testing: [Redacted]  
Address: [Redacted]

**Program - Client Contact**  
Client Contact: [Redacted]  
Address: [Redacted]  
Email: [Redacted]  
Phone: [Redacted]  
**VIEW ADDITIONAL CONTACTS**

# Program Risk

# 03

# Program Exposure and Risk Information – Property

The screenshot displays the 'Property Program 2023 - PR035401.1' interface. The top navigation bar includes 'Producing Office', 'Knowledge Base', and 'Reporting'. The main header shows 'Property Program 2023 - PR035401.1' with a Swiss flag icon, 'Property', 'Program Team', and 'Prospect' status. The 'Program Risk' module is active, showing 'Exposure Summary'. The interface includes a 'Show Values in:' section with 'Program Currency (CHF)' and a 'Local Currency' toggle. There are buttons for 'UPLOAD LOCATIONS', 'DOWNLOAD LOCATIONS', and 'ALL LOCATIONS'. A table lists exposure data for Switzerland, Mercury, with 0 locations, CHF currency, and an FX rate of 1. The table columns are: Exposed Country, Insured Legal..., # of Locations, Currency, FX Rate, Total PD (in program currency), Total BI (in program currency), Total TIV (in program currency), and Action. A red vertical bar highlights the 'Program Risk' menu item, and a red circle with the number '1' is placed next to it.

Exposed Country	Insured Legal...	# of Locations	Currency	FX Rate	Total PD (in program currency)	Total BI (in program currency)	Total TIV (in program currency)	Action
Switzerland	Mercury	0	CHF	1	-	-	-	

- 1 In the **Program Risk** module, the user can add:
- Exposure data
  - Risk Description
  - Business 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**
  - **Legal Entity Contact**
- 3 Click “Submit” to save.

Property Program 2023 - PR035401.1 Property  
CHE 12 Jul, 2023 - 12 Jul, 2024 Property Damage & Business Interruption Program Team Prospect

Program Risk > Exposure Summary

Show Values in: Program Currency (CHF) Local Currency

Exposed Country	Insured Legal...	# of Locations	Currency	FX Rate	Total PD (in program currency)	Total BI (in program currency)	Total TIV (in program currency)	Action
Switzerland	Mercury	0	CHF	1	-	-	-	

RESET SAVE COMPLETE

Program Risk > Exposure > Insured Country

1 COUNTRY & INSURED INFORMATION 2 ADDITIONAL INSURED

Country Information  
Country \*

FX Details  
Current Program Currency INR  
 Use Automated FX Rate  
 Use Custom Fx Rate  
 No FX Rate Defined

Local Currency \* Reference Date 28 Jun 2023

Automated FX Rate \* Source European Central Bank

Insured legal Entity  
Legal Entity

Legal Entity Contact  
Client Contact

CANCEL SUBMIT & ADD ANOTHER COUNTRY SUBMIT

# 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.

Producing Office: Knowledge Base, Reporting

Property Program 2023 - PR035401.1 Property  
12 Jul, 2023 - 12 Jul, 2024 Property Damage & Business Interruption

Program Team: Test User DO, TestDO.Lahitanola

Program Risk > Exposure Summary

Show Values in: Program Currency (CHF) Local Currency

UPLOAD LOCATIONS DOWNLOAD LOCATIONS ALL LOCATIONS

Exposed Country	Insured Legal...	# of Locations	Currency	FX Rate	Total PD (in program currency)	Total BI (in program currency)	Total TIV (in program currency)	Action
Switzerland	Mercury	0	CHF	1	-	-	-	[Icons]

RESET SAVE COMPLETE

Program Risk > Exposure Summary

Show Values in: Program Currency (CHF) Local Currency

UPLOAD

Drag & Drop a file here or [browse](#)

DETAILS

CANCEL CONTINUE

next step  
on  
next slide



# Exposure Upload – Details

Program Risk > Exposure Summary

Show Values in:  
Program Currency (CHF)  Local Currency

Exposed Country	Insured Legal...	# of Locations	Currency	FX Rate	Total PD (in program currency)	Total BI (in program currency)
Switzerland	Mercury	0	CHF	1	-	-

**3** → **UPLOAD** section: Drag & Drop a file here or [browse](#)

**3** → **DETAILS** section: **Exposure Upload Demo.xlsx**

Complete Statement of Values (SOV)

Select Exposure Country\*  
Switzerland

I want to...

**4** →  Add New Locations  
 Replace Locations for the selected Exposure Country

**CANCEL** **CONTINUE**

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	Currency	Rate of Exchange	Total Turnover (EU)	Annual Wages Total (EU)	Total Employees	State	City	Address	Postal Code	Domestic Turnover	Exports to USA/Canada	Exports RoW	# Blue Collar Employees	Annual Wages Blue Collar	# White Collar Employees	Annual Wages White Collar	Main Activity	% Main Activity	Activity 2	% Activity 2	Activity 3	% Activity 3	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	4889.0	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					
Switzerland	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					

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

Program Risk > Exposure > Exposure Summary > Data Mapping

Statement of Values

● Mapped (10)  
● Pending Mapping (14) Details

Source - XLS File Column Headers <b>1</b>	Target - Attribute Column Headers <b>2</b>	Actions
Country	● -	⊗ ✎
Subsidiary Name	● Subsidiary Name	⊗ ✎
Currency	● -	⊗ ✎
Rate of Exchange	● FX Rate	⊗ ✎
Total Turnover (EUR)	● -	⊗ ✎
Annual Wages Total (EUR)	● -	⊗ ✎
Total Employees	● -	⊗ ✎

CANCEL RESET PREVIOUS SAVE NEXT

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

Program Risk > Exposure > Exposure Summary > Data Mapping

Statement of Values

● Mapped (10)  
● Pending Mapping (14) Details

Source - XLS File Column Headers	Target - Attribute Column Headers	Actions
Country	● -	✗
Subsidiary Name	● Subsidiary Name	✓ 1
Currency	● -	
Rate of Exchange	● FX Rate	
Total Turnover (EUR)	● -	✗ ✎
Annual Wages Total (EUR)	● -	✗ ✎
Total Employees	● -	✗ ✎

Subsidiary Country\* Summary ▶  
Subsidiary Name Address ▶  
Local Currency TurnOver ▶  
FX Rate Employees ▶  
Reference Name Tasks ▶  
Comments ▶  
Add Custom

CANCEL RESET PREVIOUS SAVE NEXT 2

✓ 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

Program Risk > Exposure > Exposure Summary > Data Mapping

Statement of Values

Source - XLS File Column Headers

Country		
Subsidiary Name		
Currency		
Rate of Exchange		
Total Turnover (EUR)		
Annual Wages Total (EUR)		
Total Employees		

Column Headers Not Mapped

If the required columns are not mapped, then the subsidiary data will have to be entered manually. Do you still wish to proceed?

The following columns have not been mapped

- Required
  - Subsidiary Country
  - Address Line 1
  - ZIP Code
- Optional
  - Local Currency
  - Reference Name
  - Address Line 2

1

CANCEL CONTINUE

Mapped (10)

Pending Mapping (14) Details

Actions

CANCEL RESET PREVIOUS SAVE NEXT

- 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

Program Risk > Exposure > Exposure Summary > Data Mapping > Data Scrubbing

Select: **SUMMARY 14** ADDRESS 8 TURNOVER 21 EMPLOYEES 14 TASKS 32 COMMENTS 7

<input type="checkbox"/> Country (Original)	<input checked="" type="checkbox"/> Subsidiary Cou... (Scrubbed)	Subsidiary Name (Original)	<input checked="" type="checkbox"/> Subsidiary Name (Scrubbed)	Local Currency (Original)	<input checked="" type="checkbox"/> Local Currency (Scrubbed)	Rate (Orig)
<input type="checkbox"/> France	<input checked="" type="checkbox"/> France	Casualty Upload Test S.A.	<input checked="" type="checkbox"/> Casualty Upload Test		<input checked="" type="checkbox"/>	1
<input type="checkbox"/> MDG	<input checked="" type="checkbox"/> Madagascar	Madagascar Test S.A.	<input checked="" type="checkbox"/> Madagascar Test S.A.		<input checked="" type="checkbox"/>	4889
<input type="checkbox"/> Benin	<input checked="" type="checkbox"/> Benin	Bénin Test S.A.	<input checked="" type="checkbox"/> Bénin Test S.A.		<input checked="" type="checkbox"/>	655.5
<input type="checkbox"/> Switzerland	<input checked="" type="checkbox"/> Switzerland	Bündner Test AG	<input checked="" type="checkbox"/> Bündner Test AG		<input checked="" type="checkbox"/>	0.976
<input type="checkbox"/> USA	<input checked="" type="checkbox"/> United States of Am	Test Inc. (USA)	<input checked="" type="checkbox"/> Test Inc. (USA)		<input checked="" type="checkbox"/>	1.090
<input type="checkbox"/> Germany	<input checked="" type="checkbox"/> Germany	Test GmbH	<input checked="" type="checkbox"/> Test GmbH		<input checked="" type="checkbox"/>	1
<input type="checkbox"/> Belgium	<input checked="" type="checkbox"/> Belgium	Test (BE) S.A.	<input checked="" type="checkbox"/> Test (BE) S.A.		<input checked="" type="checkbox"/>	1

DELETED CANCEL PREVIOUS SAVE NEXT

- 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



Program Risk > Exposure > Exposure Summary > Data Mapping > Data Scrubbing


Select: SUMMARY 14 ADDRESS 8 TURNOVER 21 EMPLOYEES 14 **TASKS 32** COMMENTS 7

Activity 2 (Original)	Activity - 2 (Scrubbed)	% Activity 2 (Original)	Activity - 2 % (Scrubbed)	Activity 3 (Original)	Activity - 3 (Scrubbed)	% Activity 3 (Original)
Pharmaceuticals	Pharmaceuticals	12	12	Accounting & Consu		
Pharmaceuticals	Pharmaceuticals	40	40			
Chemicals	Chemicals	20	20	Accounting & Consu		
Automotive supplier	Accounting & Consulting / Professional services	11	11	Accounting & Consu		
	Aerospace manufacturers & Suppliers, Airlines					
	Automotive manufacturers & Suppliers					
	Banks					
	Building materials					
	Chemicals					

Buttons: DELETE, CANCEL, PREVIOUS, SAVE, NEXT

- 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.

# Exposure Upload – Data Scrubbing

The screenshot shows the 'Data Scrubbing' interface with a warning pop-up. The pop-up asks 'Are you sure you want to continue?' and lists optional data that has not been addressed. A red circle with the number '1' is placed over the 'CONTINUE' button in the pop-up.

Program Risk > Exposure > Exposure Summary > Data Mapping > Data Scrubbing

Select: SUMMARY 14 ADDRESS 8 TURNOVER 21 EMPLOYEES 14 TASKS 31 COMMENTS 7

Country (Original)	Subsidiary Cou... (Scrubbed)	Subsidiary (Original)	Local Currency (Original)	Local Currency (Scrubbed)	Rate of Exchange (Original)
<input type="checkbox"/> France	<input checked="" type="checkbox"/> France	Casualty Up			
<input type="checkbox"/> MDG	<input checked="" type="checkbox"/> Madagascar	Madagasca			4889
<input type="checkbox"/> Benin	<input checked="" type="checkbox"/> Benin	Bénin Test S			655.96
<input type="checkbox"/> Switzerland	<input checked="" type="checkbox"/> Switzerland	Bündner Te			0.976
<input type="checkbox"/> USA	<input checked="" type="checkbox"/> United States of Am	Test Inc. (US			1.09059
<input type="checkbox"/> Germany	<input checked="" type="checkbox"/> Germany	Test GmbH			1
<input type="checkbox"/> Belgium	<input checked="" type="checkbox"/> Belgium	Test (BE) S.A.	<input checked="" type="checkbox"/> Test (BE) S.A.		1

Are you sure you want to continue?

Optional data has not been addressed

- Required
- Optional
  - Local Currency
  - Reference Name
  - State
  - Address Line 2
  - Country TurnOver
  - TurnOver US and Canada
  - TurnOver Rest of the World

CANCEL CONTINUE

DELETE CANCEL PREVIOUS SAVE NEXT

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

**Property Program 2023 - PR035401.1** Property Program Team Prospect  
 CHE 12 Jul, 2023 - 12 Jul, 2024 Property Damage & Business Interruption

Program Risk > Exposure Summary

Show Values in: Program Currency (CHF) Local Currency

UPLOAD LOCATION DOWNLOAD LOCATIONS ALL LOCATIONS

Exposed Country	Insured Legal Entity	# of Locations	Currency	FX Rate	Total PD (in program currency)	Total BI (in program currency)	Total TIV (in program currency)	Action
Switzerland	Mercury	1	CHF	1	0	0	0	[Icons]
Belgium	-	1	EUR	1	0	0	0	[Icons]
Benin	-	1	XOF	655.96	0	0	0	[Icons]
France	-	1	EUR	1	0	0	0	[Icons]
Germany	-	1	EUR	1	0	0	0	[Icons]
Madagascar	-	1	MGA	4889	0	0	0	[Icons]
United States of America (the)	-	1	USD	1.0905	0	0	0	[Icons]

RESET SAVE COMPLETE

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

Producing Office Knowledge Base Reporting

**PR035401.1** Property Program 2023

Program Overview Program Risk Program Designer Policy Manager

**Property Program 2023 - PR035401.1** Property  
 CHE 12 Jul, 2023 - 12 Jul, 2024 Property Damage & Business Interruption Program Team Prospect

Program Risk > Exposure Summary

Show Values in: Program Currency (CHF) Local Currency

UPLOAD LOCATIONS DOWNLOAD LOCATIONS ALL LOCATIONS

Exposed Country	Insured Legal Entity	# of Locations	Currency	FX Rate	Total PD (in program currency)	Total BI (in program currency)	Total TIV (in program currency)	Action
Switzerland	Mercury	1	CHF	1	0	0	0	[Check] [Edit] [Add] [Delete]
Belgium	-	1	EUR	1	0	0	0	[Check] [Edit] [Add] [Delete]
Benin	-	1	XOF	655.96	0	0	0	[Check] [Edit] [Add] [Delete]
France	-	1	EUR	1	0	0	0	[Check] [Edit] [Add] [Delete]

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

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

Program Risk > Exposure > Manage Locations

Show Values in: Program Currency (CHF) Local Currency

DOWNLOAD LOCATIONS

Select: SUMMARY ADDRESS DESCRIPTION PROTECTION/PREVENTION PD VALUES BI VALUES COMMENT

<input type="checkbox"/>	Country*	Subsidiary Name	Currency	FX Rate	Reference Name	Total PD (in program currency)	Total BI (in program currency)
<input type="checkbox"/>	France	Casualty Upload Test ...	EUR	1	-	0	0
<input type="checkbox"/>	Madagascar	Madagascar Test S.A.	MGA	4889	-	0	0
<input type="checkbox"/>	Benin	Bénin Test S.A.	XOF	655.96	-	0	0
<input type="checkbox"/>	Switzerland	Bündner Test AG	CHF	0.976	-	0	0
<input type="checkbox"/>	United States of A...	Test Inc. (USA)	USD	1.09059	-	0	0
<input type="checkbox"/>	Germany	Test GmbH	EUR	1	-	0	0
<input type="checkbox"/>	Belgium	Test (BE) S.A.	EUR	1	-	0	0

click

# Actions

+
Property Program 2023 - PR035401.1
Property
Program Team
● Prospect

CHE 12 Jul, 2023 - 12 Jul, 2024
Property Damage & Business Interruption

Program Risk > Exposure Summary

Show Values in: Program Currency (CHF)  Local Currency

UPLOAD LOCATIONS
 DOWNLOAD LOCATIONS
 ALL LOCATIONS

Exposed Country	Insured Legal Entity	# of Locations	Currency	FX Rate	Total PD (in program currency)	Total BI (in program currency)	Total TIV (in program currency)	Action <span style="border: 2px solid red; border-radius: 50%; padding: 2px 5px; font-weight: bold;">1</span>
Switzerland	Mercury	1	CHF	1	0	0	0	
Belgium	-	1	EUR	1	0	0	0	
Benin	-	1	XOF	655.96	0	0	0	
France	-	1	EUR	1	0	0	0	

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.

Producing Office  
Knowledge Base  
Reporting  
CA035233.1  
Casualty Program 2023  
Program Overview  
Program Risk  
Exposure  
Business Description

Casualty Program 2023 - CA035233... Casualty  
FRA 5 Jul, 2023 - 5 Jul, 2024 Public/General Liability  
Program Team Prospect

Program Risk > Exposure Summary

Show Values in:  
Program Currency (EUR) Local Currency

UPLOAD SUBSIDIARIES DOWNLOAD SUBSIDIARIES ALL SUBSIDIARIES

Exposed Country	Insured Legal Entity	# of Subsidiaries	Currency	FX Rate	Total Turnover (in program currency)	Total Annual Wages (in program currency)	# of Employees	Action
France	Mercury	0	EUR	1	-	-	-	

RESET SAVE COMPLETE

Program Risk > Exposure > Insured Country

1 COUNTRY & INSURED INFORMATION 2 ADDITIONAL INSURED

Country Information  
Country\*  
FX Details  
Current Program Currency INR  
Use Automated FX Rate  
Use Custom FX Rate  
No FX Rate Defined  
Reference Date  
Local Currency\* 28 Jun 2023  
Source  
Automated FX Rate\* European Central Bank

Insured legal Entity  
Legal Entity  
Add Legal Entity

Legal Entity Contact  
Client Contact  
Add Contact

2 3

CANCEL SUBMIT & ADD ANOTHER COUNTRY SUBMIT

# 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.

The screenshot shows the 'Casualty Program 2023 - CA035233...' interface. The top navigation bar includes 'Producing Office' (FRA), 'Knowledge Base', 'Reporting', and 'Program Team'. The main content area is titled 'Program Risk > Exposure Summary'. Below this, there are options for 'Show Values in:' (Program Currency (EUR) and Local Currency) and a table with columns: Exposed Country, Insured Legal Entity, # of Subsidiaries, Currency, FX Rate, Total Turnover, Total Annual Wages, # of Employees, and Action. A red circle highlights the 'UPLOAD SUBSIDIARIES' button, with a red arrow pointing to it and the word 'click' written vertically next to the arrow.

The screenshot shows the 'Upload Subsidiaries' dialog box. It features a file upload area with the text 'Drag & Drop a file here or [browse](#)'. Below this area is a 'DETAILS' button, which is circled in red and labeled with a red '2'. At the bottom of the dialog are 'CANCEL' and 'CONTINUE' buttons.

next step  
on  
next slide



# Exposure Upload – Details

Program Risk > Exposure Summary

Show Values in:  
Program Currency (EUR)  Local Currency

UPLOAD SUBSIDIARIES

Exposed Country	Insured Legal...	# of Subsidiaries	Currency	FX Rate	Total Turnover (in program currency)	Total Annual Wages (in program currency)
France	Mercury	0	EUR	1	-	-

+ (Add Country)

Drag & Drop a file here or [browse](#)

**DETAILS**

Exposure Upload Demo.xlsx

Complete Statement of Values (SOV)

Select Exposure Country\*

France

I want to...

Add New Subsidiaries

Replace Subsidiaries for the selected Exposure Country

CANCEL CONTINUE

**3** (Red circle with arrow pointing to 'Exposure Upload Demo.xlsx')

**3** (Red circle with arrow pointing to 'Complete Statement of Values (SOV)')

**4** (Red circle with arrow pointing to 'Add New Subsidiaries')

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

Country	Subsidiary Name	Currency	Rate of Exchange	Total Turnover (EU)	Annual Wages Total (EU)	Total Employees	State	City	Address	Postal Code	Domestic Turnover	Exports to USA/Canada	Exports RoW	# Blue Collar Employees	Annual Wages Blue Collar	# White Collar Employees	Annual Wages White Collar	Main Activity	% Main Activity	Activity 2	% Activity 2	Activity 3	% Activity 3	Comment
France	Casualty Upload Test S.A.	EUR	1	418'350'100	42'370'061	620	Île-de-France	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	4889.0	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					
Switzerland	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					

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

Program Risk > Exposure > Exposure Summary > Data Mapping

Statement of Values

● Mapped (10)  
● Pending Mapping (14) Details

Source - XLS File Column Headers <b>1</b>	Target - Attribute Column Headers <b>2</b>	Actions
Country	● -	⊗ ✎
Subsidiary Name	● Subsidiary Name	⊗ ✎
Currency	● -	⊗ ✎
Rate of Exchange	● FX Rate	⊗ ✎
Total Turnover (EUR)	● -	⊗ ✎
Annual Wages Total (EUR)	● -	⊗ ✎
Total Employees	● -	⊗ ✎

CANCEL RESET PREVIOUS SAVE NEXT

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

Program Risk > Exposure > Exposure Summary > Data Mapping

Statement of Values

● Mapped (10)  
● Pending Mapping (14) Details

Source - XLS File Column Headers	Target - Attribute Column Headers	Actions
Country	● -	✘
Subsidiary Name	● Subsidiary Name	✔ 1
Currency	● -	
Rate of Exchange	● FX Rate	
Total Turnover (EUR)	● -	✘ ✎
Annual Wages Total (EUR)	● -	✘ ✎
Total Employees	● -	✘ ✎

Subsidiary Country\* Summary ▶  
Subsidiary Name Address ▶  
Local Currency TurnOver ▶  
FX Rate Employees ▶  
Reference Name Tasks ▶  
Comments ▶  
Add Custom

CANCEL RESET PREVIOUS SAVE NEXT 2

✔ 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

Program Risk > Exposure > Exposure Summary > Data Mapping

Statement of Values

Source - XLS File Column Headers

Column	Status	Actions
Country	Mapped	✕ ✎
Subsidiary Name	Mapped	✕ ✎
Currency	Mapped	✕ ✎
Rate of Exchange	Mapped	✕ ✎
Total Turnover (EUR)	Mapped	✕ ✎
Annual Wages Total (EUR)	Pending Mapping	✕ ✎
Total Employees	Pending Mapping	✕ ✎

● Mapped (10)  
● Pending Mapping (14) Details

**Column Headers Not Mapped**

If the required columns are not mapped, then the subsidiary data will have to be entered manually. Do you still wish to proceed?

**The following columns have not been mapped**

- Required
  - Subsidiary Country
  - Address Line 1
  - ZIP Code
- Optional
  - Local Currency
  - Reference Name
  - Address Line 2

1

CANCEL CONTINUE

CANCEL RESET PREVIOUS SAVE NEXT

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


Program Risk > Exposure > Exposure Summary > Data Mapping > Data Scrubbing


Select: **SUMMARY 14** ADDRESS 8 TURNOVER 21 EMPLOYEES 14 TASKS 32 COMMENTS 7


<input type="checkbox"/>	Country (Original)	Subsidiary Cou... (Scrubbed)	Subsidiary Name (Original)	Subsidiary Name (Scrubbed)	Local Currency (Original)	Local Currency (Scrubbed)	Rate (Orig)
<input type="checkbox"/>	France	France	Casualty Upload Test S.A.	Casualty Upload Test			1
<input type="checkbox"/>	MDG	Madagascar	Madagascar Test S.A.	Madagascar Test S.A.			4889
<input type="checkbox"/>	Benin	Benin	Bénin Test S.A.	Bénin Test S.A.			655.5
<input type="checkbox"/>	Switzerland	Switzerland	Bündner Test AG	Bündner Test AG			0.976
<input type="checkbox"/>	USA	United States of Am	Test Inc. (USA)	Test Inc. (USA)			1.090
<input type="checkbox"/>	Germany	Germany	Test GmbH	Test GmbH			1
<input type="checkbox"/>	Belgium	Belgium	Test (BE) S.A.	Test (BE) S.A.			1

DELETED CANCEL PREVIOUS SAVE NEXT

- 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

Program Risk > Exposure > Exposure Summary > Data Mapping > Data Scrubbing

Select: SUMMARY 14 ADDRESS 8 TURNOVER 21 EMPLOYEES 14 **TASKS 32** COMMENTS 7

Activity 2 (Original)	Activity - 2 (Scrubbed)	% Activity 2 (Original)	Activity - 2 % (Scrubbed)	Activity 3 (Original)	Activity - 3 (Scrubbed)	% Activity 3 (Original)
Pharmaceuticals	Pharmaceuticals	12	12	Accounting & Consu		
Pharmaceuticals	Pharmaceuticals	40	40			
Chemicals	Chemicals	20	20	Accounting & Consu		
Automotive supplier	Accounting & Consulting / Professional services	11	11	Accounting & Consu		
	Aerospace manufacturers & Suppliers, Airlines					
	Automotive manufacturers & Suppliers					
	Banks					
	Building materials					
	Chemicals					

DELETED CANCEL PREVIOUS SAVE NEXT

- 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

Program Risk > Exposure > Exposure Summary > Data Mapping > Data Scrubbing

Select: SUMMARY 14 ADDRESS 8 TURNOVER 21 EMPLOYEES 14 TASKS 31 COMMENTS 7

Country (Original)	Subsidiary Country (Scrubbed)	Subsidiary Name (Original)	Local Currency (Original)	Local Currency (Scrubbed)	Rate of Exchange (Original)
France	France	Casualty Up...			1
MDG	Madagascar	Madagascar			4889
Benin	Benin	Bénin Test S...			655.96
Switzerland	Switzerland	Bündner Te...			0.976
USA	United States of Am...	Test Inc. (US...			1.09059
Germany	Germany	Test GmbH			1
Belgium	Belgium	Test (BE) S.A.			1

Are you sure you want to continue?

Optional data has not been addressed

- Required
- Optional
  - Local Currency
  - Reference Name
  - State
  - Address Line 2
  - Country TurnOver
  - TurnOver US and Canada
  - TurnOver Rest of the World

CANCEL CONTINUE

DELETE CANCEL PREVIOUS SAVE NEXT

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

**Casualty Program 2023 - CA035233...** Casualty  
FRA 5 Jul, 2023 - 5 Jul, 2024 Public/General Liability Program Team Prospect

Program Risk > Exposure Summary

Show Values in: Program Currency (EUR) Local Currency

UPLOAD SUBSIDIARIES DOWNLOAD SUBSIDIARIES ALL SUBSIDIARIES

Exposed Country	Insured Legal...	# of Subsidiaries	Currency	FX Rate	Total Turnover (in program currency)	Total Annual Wages (in program currency)	# of Employees	Action
France	Mercury	2	EUR	1	0	0	1240	[Eye] [Edit] [Download] [Trash]
Belgium	-	1	Belar...	1	0	0	7	[Eye] [Edit] [Download] [Trash]
Benin	-	1	CFA ...	655.96	0	0	58	[Eye] [Edit] [Download] [Trash]
Germany	-	1	Euro	1	0	0	98	[Eye] [Edit] [Download] [Trash]
Madagascar	-	1	Mala...	4'889	0	0	71	[Eye] [Edit] [Download] [Trash]
Switzerland	-	1	Seyc...	0.976	0	0	163	[Eye] [Edit] [Download] [Trash]
United States of America (the)	-	1	US D...	1.0905	0	0	68	[Eye] [Edit] [Download] [Trash]

+ RESET SAVE COMPLETE

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

Producing Office Knowledge Base Reporting

**CA035233.1**  
Casualty Program 2023

Program Overview Program Risk Program Designer

**Casualty Program 2023 - CA035233...** Casualty  
FRA 5 Jul, 2023 - 5 Jul, 2024 Public/General Liability Program Team Prospect

Program Risk > Exposure Summary

Show Values in: Program Currency (EUR) Local Currency

UPLOAD SUBSIDIARIES DOWNLOAD SUBSIDIARIES ALL SUBSIDIARIES

Exposed Country	Insured Legal...	# of Subsidiaries	Currency	FX Rate	Total Turnover (in program currency)	Total Annual Wages (in program currency)	# of Employees	Action
France	Mercury	2	EUR	1	0	0	1240	[Eye] [Edit] [Add] [Delete]
Belgium	-	1	Belar...	1	0	0	7	[Eye] [Edit] [Add] [Delete]
Benin	-	1	CFA ...	655.96	0	0	58	[Eye] [Edit] [Add] [Delete]

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

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

Program Risk > Exposure > Manage Subsidiaries

Show Values in: Program Currency (EUR) Local Currency

UPLOAD SUBSIDIARIES DOWNLOAD SUBSIDIARIES

Select: SUMMARY ADDRESS TURNOVER EMPLOYEES TASKS COMMENT + Add Custom

<input type="checkbox"/>	Country*	Subsidiary Name	Currency	FX Rate	Reference Name	Total Turnover (in program currency)	T...
<input type="checkbox"/>	France	Casualty Upload Test S.A.	choose	1		0	0
<input type="checkbox"/>	France	Casualty Upload Test S.A.	choose	1		0	0
<input type="checkbox"/>	Madagascar	Madagascar Test S.A.	choose	4'889		0	0
<input type="checkbox"/>	Benin	Bénin Test S.A.	choose	655.96		0	0

+ DELETE CANCEL BACK SAVE

# Actions

Producing Office
 

Knowledge Base

Reporting

**Casualty Program 2023 - CA035233...** Casualty  
FRA 5 Jul, 2023 - 5 Jul, 2024 Public/General Liability

**Program Team**  
● Prospect

Program Risk > Exposure Summary

Show Values in: Program Currency (EUR)  Local Currency

UPLOAD SUBSIDIARIES
 DOWNLOAD SUBSIDIARIES
 ALL SUBSIDIARIES

Exposed Country	Insured Legal...	# of Subsidiaries	Currency	FX Rate	Total Turnover <small>(in program currency)</small>	Total Annual Wages <small>(in program currency)</small>	# of Employees	Action
France	Mercury	2	EUR	1	0	0	1240	<div style="border: 1px solid red; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center; margin: 0 auto;">1</div> <div style="display: flex; justify-content: space-around; width: 100%; margin-top: 5px;"> </div>
Belgium	-	1	Belar...	1	0	0	7	<div style="display: flex; justify-content: space-around; width: 100%; margin-top: 5px;"> </div>
Benin	-	1	CFA ...	655.96	0	0	58	<div style="display: flex; justify-content: space-around; width: 100%; margin-top: 5px;"> </div>
Germany	-	1	Euro	1	0	0	98	<div style="display: flex; justify-content: space-around; width: 100%; margin-top: 5px;"> </div>

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

The screenshot displays the 'Program Designer' interface for 'Property Program 2023 - PR035401.1'. The main content area is titled 'Countries & Structure' and shows a progress indicator with three steps: 1. STRUCTURING REQUIREMENTS (active), 2. POLICY REQUIREMENTS, and 3. SERVICE & COMPLIANCE. A table lists countries with columns for 'Exposed Country', 'Policy Intended?', 'Policy Type', 'Master Coverage Intended?', 'Master Solution', and 'Action'. The 'Policy Intended?' and 'Master Coverage Intended?' columns feature toggle switches. A red bracket and the number '1' highlight the 'Program Designer' menu item in the sidebar.

Exposed Country	Policy Intended?	Policy Type	Master Coverage Intended?	Master Solution	Action
Switzerland	<input checked="" type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Master Policy	<input checked="" type="checkbox"/> No <input checked="" type="checkbox"/> Yes		
Belgium	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		
Benin	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		
France	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		
Germany	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		

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

Property Program 2023 - PR035401.1 Property  
CHE 12 Jul, 2023 - 12 Jul, 2024 Property Damage & Business Interruption Program Team Prospect

Program Designer > Countries & Structure

1 STRUCTURING REQUIREMENTS 2 POLICY REQUIREMENTS 3 SERVICE & COMPLIANCE

ADD POLICY

Exposed Country 1	Policy Intended?	Policy Type 2	Master Coverage Intended?	Master Solution 3	Action
Switzerland	No <input checked="" type="checkbox"/> Yes	Master Policy	No <input checked="" type="checkbox"/> Yes	Admitted (DIC/DIL)	
Belgium	No <input checked="" type="checkbox"/> Yes	Local Policy	<input checked="" type="checkbox"/> No Yes		
Benin	No <input checked="" type="checkbox"/> Yes	Local Policy	No <input checked="" type="checkbox"/> Yes	Admitted (DIC/DIL)	
France	No <input checked="" type="checkbox"/> Yes	Local Policy	<input checked="" type="checkbox"/> No Yes		
Germany	No <input checked="" type="checkbox"/> Yes	Local Policy	<input checked="" type="checkbox"/> No Yes		

+ 1

RESET SUBMIT NEXT

# 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

The screenshot shows the 'Property Program 2023 - PR035401.1' interface. The 'ADD POLICY' button is circled in red and labeled with a '1'. Below it is a table with columns: Exposed Country, Policy Intended?, Policy Type, Master Coverage Intended?, Master Solution, and Action. The table lists countries: Switzerland, Belgium, Benin, France, and Germany. Each row has 'No' and 'Yes' radio buttons for 'Policy Intended?' and 'Master Coverage Intended?'. The 'Master Solution' column has dropdown menus. At the bottom right are 'RESET', 'SUBMIT', and 'NEXT' buttons.

Exposed Country	Policy Intended?	Policy Type	Master Coverage Intended?	Master Solution	Action
Switzerland	No <input type="radio"/> Yes <input checked="" type="radio"/>	Master Policy	No <input type="radio"/> Yes <input checked="" type="radio"/>	Admitted (DIC/DIL)	
Belgium	No <input type="radio"/> Yes <input checked="" type="radio"/>	Local Policy	<input checked="" type="radio"/> No <input type="radio"/> Yes		
Benin	No <input type="radio"/> Yes <input checked="" type="radio"/>	Local Policy	No <input type="radio"/> Yes <input checked="" type="radio"/>	Admitted (DIC/DIL)	
France	No <input type="radio"/> Yes <input checked="" type="radio"/>	Local Policy	<input checked="" type="radio"/> No <input type="radio"/> Yes		
Germany	No <input type="radio"/> Yes <input checked="" type="radio"/>	Local Policy	<input checked="" type="radio"/> No <input type="radio"/> Yes		

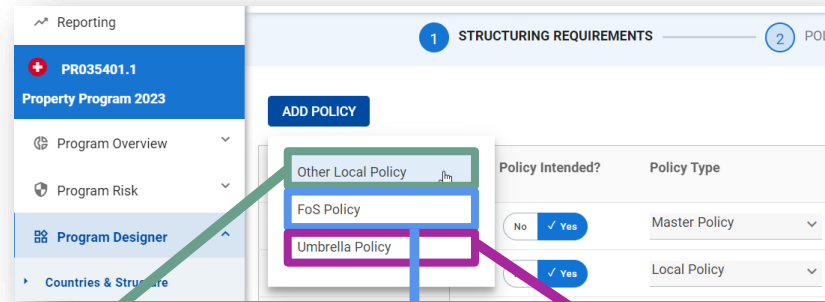
The screenshot shows the 'ADD POLICY' dropdown menu with three options: 'Other Local Policy', 'FoS Policy', and 'Umbrella Policy'. The 'Other Local Policy' option is highlighted with a red arrow and labeled with a '2'.

next step  
on  
next slide

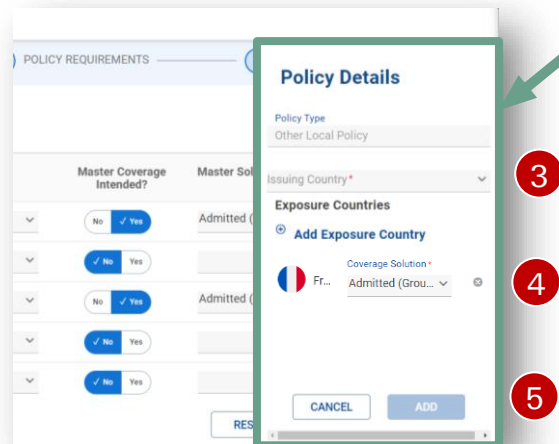


# Program Designer – Add New Policy

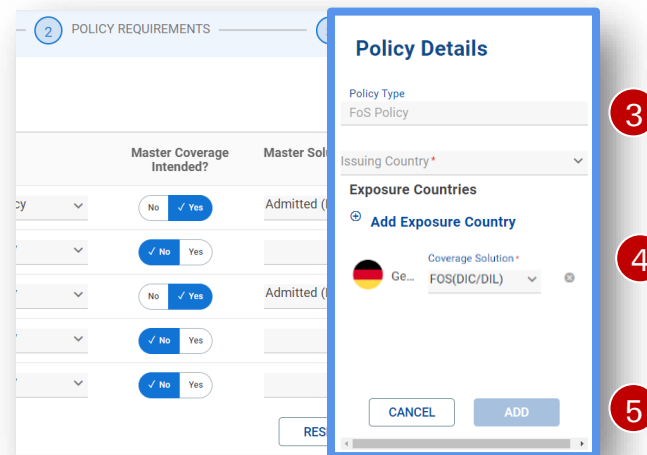
- 3 Select the Issuing Country
- 4 Select the Exposure Countries and Coverage Solution
- 5 Click "Add"



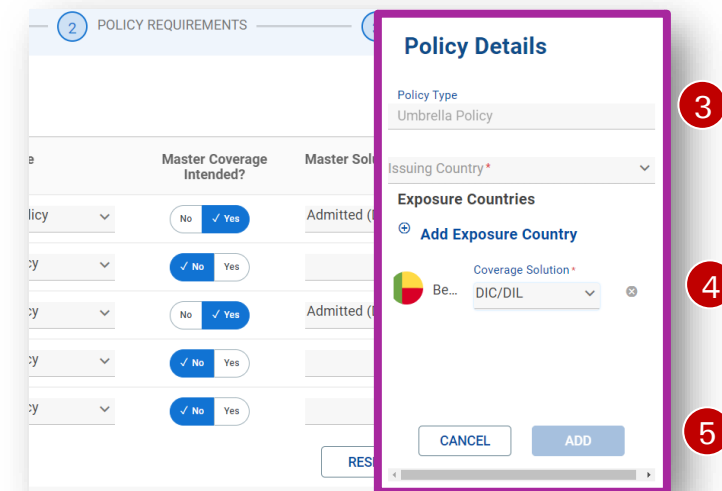
Other Local Policy



FoS Policy

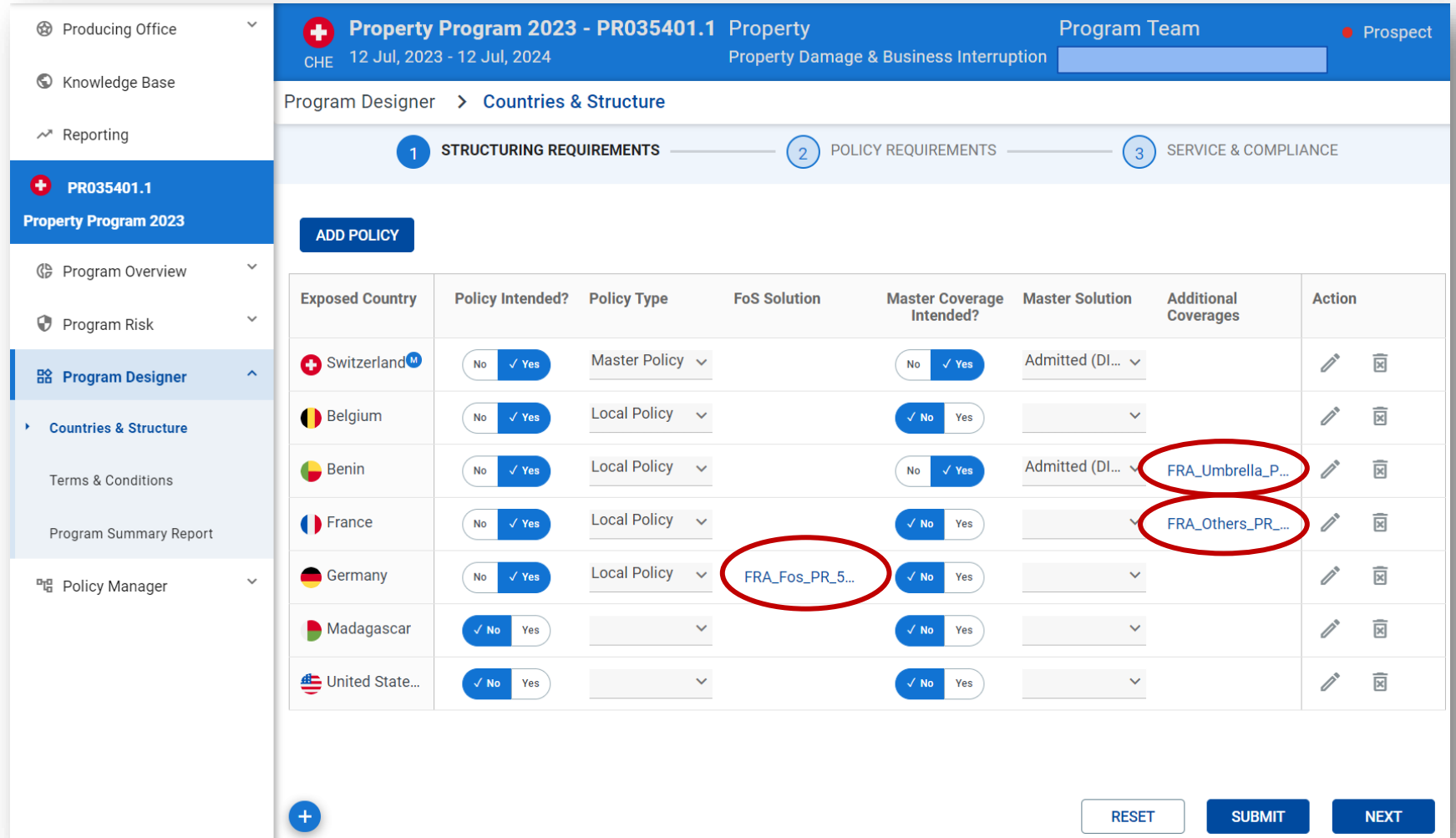


Umbrella Policy



# Program Designer – Add New Policy

The user can now see all three added policies



The screenshot displays the 'Property Program 2023 - PR035401.1' interface. The left sidebar shows navigation options like 'Producing Office', 'Knowledge Base', and 'Reporting'. The main content area is titled 'Program Designer > Countries & Structure' and features a progress bar with three steps: '1 STRUCTURING REQUIREMENTS', '2 POLICY REQUIREMENTS', and '3 SERVICE & COMPLIANCE'. An 'ADD POLICY' button is visible above a table of countries. The table has columns for 'Exposed Country', 'Policy Intended?', 'Policy Type', 'FoS Solution', 'Master Coverage Intended?', 'Master Solution', 'Additional Coverages', and 'Action'. Three entries are circled in red: Germany (FRA\_Fos\_PR\_5...), Benin (FRA\_Umbrella\_P...), and France (FRA\_Others\_PR...). At the bottom right, there are 'RESET', 'SUBMIT', and 'NEXT' buttons.

Exposed Country	Policy Intended?	Policy Type	FoS Solution	Master Coverage Intended?	Master Solution	Additional Coverages	Action
Switzerland	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Master Policy		<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Admitted (DI...		
Belgium	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Local Policy		<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
Benin	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Local Policy		<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Admitted (DI...	FRA_Umbrella_P...	
France	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Local Policy		<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes		FRA_Others_PR...	
Germany	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	Local Policy	FRA_Fos_PR_5...	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
Madagascar	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			
United State...	<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			<input checked="" type="checkbox"/> No <input type="checkbox"/> Yes			

# 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.

The screenshot shows the 'Program Designer' interface for 'Property Program 2023 - PR035401.1'. The current step is 'POLICY REQUIREMENTS', which is highlighted with a red circle. The interface includes a sidebar with navigation options, a top header with program details, and a main table with columns for Policy Type, Issuing Country, Policy Structure, Policy Reference Name, Policy Currency, and FX Rate. The table contains several rows of policy data.

Policy Type	Issuing Country	Policy Structure *	Policy Reference Name *	Policy Currency *	FX Rate *
Master Policy <sup>M</sup>	Switzerland	Integrated	CHE_Master_PR_52626	CHF	1
Other Local Policy	France	Integrated	FRA_Others_PR_52704	EUR	1
Fos Policy <sup>Fos</sup>	France	Integrated	FRA_Fos_PR_52705	EUR	1
Umbrella Policy	France	Integrated	FRA_Umbrella_PR_52706	EUR	1
Local Policy	Belgium	Integrated	BEL_Local_PR_52677	EUR	1
Local Policy	Benin	Integrated	BEN_Local_PR_52678	XOF	655.96
Local Policy	France	Integrated	FRA_Local_PR_52679	EUR	1
Local Policy	Germany	Integrated	DEU_Local_PR_52680	EUR	1

# 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”

The screenshot displays the 'Service & Compliance' step of the Program Designer interface. The top navigation bar shows the program details: 'Property Program 2023 - PR035401.1', 'Property', 'Program Team', and 'Prospect'. The main content area is divided into three rows, each representing a different country configuration. The first row is for Switzerland (Issuing Country: Switzerland MASTER, Servicing Office: [empty]), the second for France (Issuing Country: France OTHERS, Covered Countries: FRA, Servicing Office: Swiss Re International SE, Succur...), and the third for France (Issuing Country: France FOS, Covered Countries: [empty]). Each row includes sections for 'Coverage considerations', 'Service considerations', and 'Recommended Actions'. The 'Recommended Actions' section for the second and third rows highlights a 'Pre-quote Task' with a red circle '3'. At the bottom right, there are buttons for 'PREVIOUS', 'SAVE', and '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

Program Designer > Countries & Structure

1 STRUCTURING REQUIREMENTS 2 POLICY REQUIREMENTS 3 SERVICE & COMPLIANCE

PR035401.1  
Property Program 2023

Program Overview  
Program Risk  
Program Designer  
Countries & Structure  
Terms & Conditions  
Program Summary Report  
Policy Manager

Issuing Country: Switzerland MASTER  
Covered Countries: France OTHERS

Recommended Actions: Pre-quote Task

Countries & Structuring > Create Pre-Quote Request

Task Type \*  
Pre-Quote

Due Date \*  
11 Jul, 2023

Task Country \*  
France

Local Carrier \*  
Swiss Re International SE, Succursale pour la France

Local Carrier Team \*  
Select local carrier team

Team Manager \*

Task Description

Additional Information

Exposure Information  
Policyholder Details

Documents

Drop files to attach, or browse

RESET PREVIOUS SEND TASK

Pre-Quote

PQ - 100023775

New Action Required By: Mahesh Dommati

Kicked Off Date: 4 Jul, 2023 Due On: 11 Jul, 2023

Originator: TestPO Task Owner: [redacted]

Details

Program Name: Property Program 2023  
Line Of Business: Property  
Local Client: -

Program ID: PR035401.1  
Producing Office: [redacted]  
Local Carrier Team: Integration testing team

Policy ID: FRA\_Others\_PR\_5270  
Country Of Risk: France  
Issuing Entity: Swiss Re International SE, Succursale pour la France

Description

Pre-Quote Details - France

# Policy Manager

# 05



# Program Exposure and Risk Information – Casualty

The screenshot displays the 'Property Program 2023 - PR035401.1' interface. The top navigation bar includes 'Producing Office', 'Knowledge Base', 'Reporting', and 'Program Team'. The main content area is titled 'Policy Manager > Policy Overview' and shows a list of policies under the heading 'Policies'. A red circle with the number '1' highlights the 'Policy Overview' menu item in the left sidebar. The policies listed are:

Policy ID	Policy Type	Policy Period	Policy Limit	Producing Carrier	Servicing Carrier
CHE_Master_PR_52626	Integrated Master Policy	12 Jul 2023 - 12 Jul 2024	0	-	[Redacted]
BEL_Local_PR_52677	Integrated Local Policy	12 Jul 2023 - 12 Jul 2024	0	-	-
BEN_Local_PR_52678	Integrated Local Policy	12 Jul 2023 - 12 Jul 2024	0	-	-

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

- Policy Overview
- Policy Details

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

The screenshot displays the 'Policy Manager' interface for 'Property Program 2023 - PR035401.1'. The interface is divided into a left sidebar with navigation options like 'Producing Office', 'Knowledge Base', and 'Reporting', and a main content area. The main area shows a 'Policy Overview' section with a 'Policy Status' dropdown menu (highlighted with a red circle and the number 1) set to 'All'. Below this, there is a grid of six policy cards, each representing a different country: CHE (Master), BEL (Local), BEN (Local), FRA (Local), DEU (Local), and FRA (Others). Each card displays key details such as Policy Type, Policy Period, Policy Limit, and Producing/Serviceing Carrier. The cards are all marked as 'Prospect Property' and have an 'Open Policy' button at the bottom.

Country	Policy ID	Policy Type	Policy Period	Policy Limit	Producing Carrier	Serviceing Carrier
CHE	CHE_Master_PR_52626	Integrated Master Policy	12 Jul 2023 - 12 Jul 2024	0	-	-
BEL	BEL_Local_PR_52677	Integrated Local Policy	12 Jul 2023 - 12 Jul 2024	0	-	-
BEN	BEN_Local_PR_52678	Integrated Local Policy	12 Jul 2023 - 12 Jul 2024	0	-	-
FRA	FRA_Local_PR_52679	Integrated Local Policy	12 Jul 2023 - 12 Jul 2024	0	-	Swiss Re International SE, Succursale pour la France
DEU	DEU_Local_PR_52680	Integrated Local Policy	12 Jul 2023 - 12 Jul 2024	0	-	Swiss Re International SE, Niederlassung Deutschland
FRA	FRA_Others_PR_52704	Integrated Other Local Policy	12 Jul 2023 - 12 Jul 2024	0	-	Swiss Re International SE, Succursale pour la France

- 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

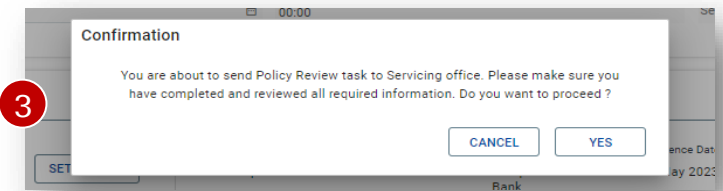
The screenshot shows the 'Policy Manager' interface for 'Property Program 2023 - PR035401.1'. The 'Policy Details' section is active, showing a list of policy parties. A red circle highlights the 'Policy Parties' tab and its sub-sections: Global Client, Producing Carrier, Producing Broker, Policy Holder Information, Policy Carrier, and Policy Broker. A red '1' is placed next to the 'Policy Details' menu item in the left sidebar.

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 screenshot displays the Policy Manager interface. At the top, there is a navigation bar with 'Documents' and 'Chat' tabs. Below this is a yellow warning banner with a triangle icon and the text: 'Please note that the Policy Review task is on hold currently as Servicing office needs additional information.' A red circle with the number '1' is placed over the end of this message. The main content area is titled 'POLICY PARTY' and contains two sections: 'Global Client Information' and 'Producing Carrier Information'. The 'Global Client Information' section has a 'SAVE' button and a dropdown arrow. It contains fields for 'Head Quarter Country' (Switzerland), 'Legal Entity' (blue box), 'Address' (blue box), 'Producing Broker' (grey box), and 'Producing Broker Contact' (grey box). The 'Producing Carrier Information' section has a 'SAVE' button and a right-pointing arrow. A red circle with the number '2' is placed over the 'SAVE' button. At the bottom of the interface, there are buttons for 'DOWNLOAD POLICY REQUEST', 'DOWNLOAD T&C', 'RESOLVE REQUEST', and 'CANCEL TASK'.

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

The screenshot displays the Policy Manager interface. At the top, there is a navigation bar with 'Documents' and 'Chat' tabs. Below this is a green notification bar with a checkmark icon and the text: 'Policy Review has been completed. Please contact Servicing office if further updates need to be made to it.' A red circle with the number '1' is positioned at the end of this notification. Underneath the notification is the 'POLICY PARTY' section, which includes a 'Global Client Information' header. This section contains several input fields: 'Head Quarter Country' (with the value 'Switzerland'), 'Legal Entity' (with a blue placeholder box), 'Address' (with a blue placeholder box), 'Producing Broker' (with a grey placeholder box), and 'Producing Broker Contact' (with a grey placeholder box). Below the 'Global Client Information' section is the 'Producing Carrier Information' section, which is currently collapsed. At the bottom of the interface, there are three buttons: 'DOWNLOAD POLICY REQUEST', 'DOWNLOAD T&C', and 'EDIT'.

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

Program Overview > Program Activities > Service Request Details

Swiss Cheese Company - PR000139.1\_\_DEU\_95 - Policy Issuance New  
Due on: 16 Dec, 2020

Program Overview > Program Activities > Service Request Details

Swiss Cheese Company - PR000139.1\_\_DEU\_94 - Invoice Issuance New  
Due on: 16 Dec, 2020

Program Overview > Program Activities > Service Request Details

Swiss Cheese Company - PR000139.1\_\_DEU\_96 - Premium Collection New  
Due on: 17 Feb, 2021

Line Of Business	Received Date	Local Carrier Team	Task Owner
Property	25 Nov, 2020	SDM Team	Marie Hardelauf

Chat Documents Task History

Team Conversations

Normal Sans Serif B I U

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

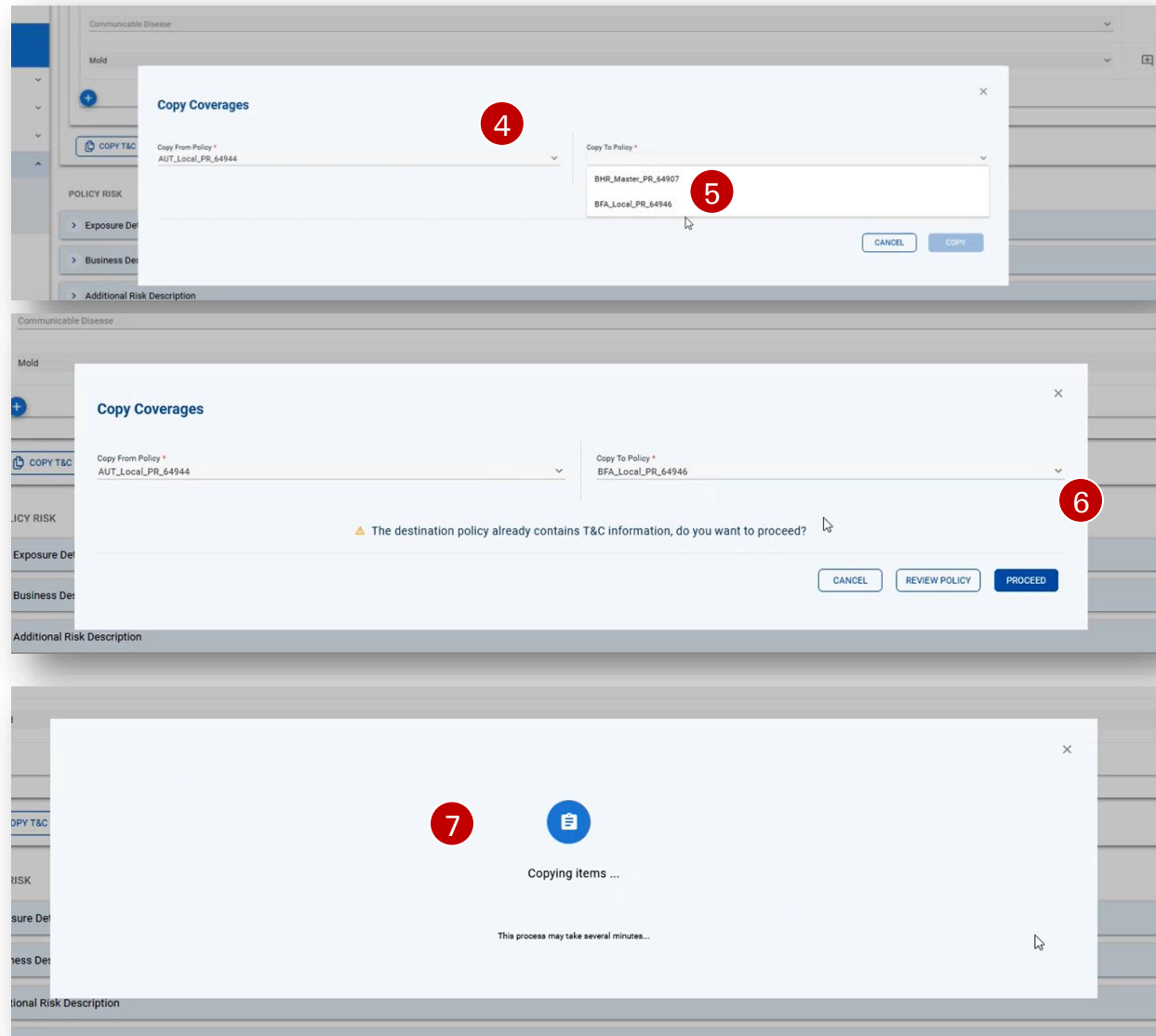
The screenshot shows a web interface for a policy management system. At the top, there is a blue header bar with the following information: 'Test Program - PR006715.1', 'Property', 'Program Team', and 'EXPIRED'. Below the header, there is a breadcrumb trail: 'Policy Manager > Policy Details > Policy Request'. The main content area displays 'India, Master Policy' with a dropdown menu for 'Other Policies (4)'. A red circle '1' is placed over the 'Terms & Conditions' tab in the navigation menu. Below the navigation menu, there is a 'Copy Coverage' button with a red circle '2' next to it. The 'Policy Status' is 'Prospect' and the 'Program Currency (INR)' is selected.

A confirmation dialog box is shown, titled 'Confirmation'. The text inside reads: 'Please make sure you have saved your changes before copying. Do you want to proceed?'. There are two buttons: 'CANCEL' and 'PROCEED'. A red circle '3' is placed over the dialog box.

- 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.

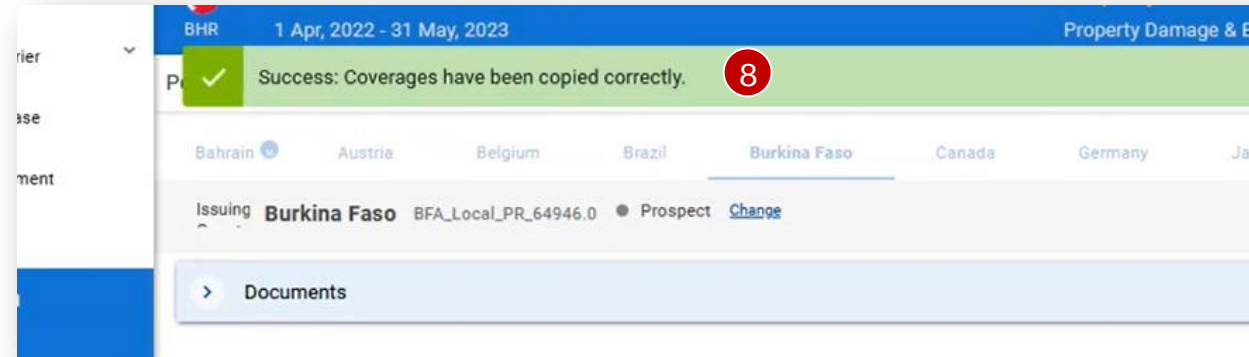
# Terms & Conditions Copy

- 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.

The screenshot shows a software interface with a table of coverage data. The table has columns for Limit Class, Coverage, Sub Coverage, Scope, Limit Type, Limit Option, Value (in program currency), and Action. A red circle with the number 9 is placed over the table. The table data is as follows:

Limit Class	Coverage	Sub Coverage	Scope	Limit Type	Limit Option	Value (in program currency)	Action
Sub Limits	Boiler & Machinery		PD/BI Combined	Amount	Per Occurrence	2222	[Edit]
Sub Limits	Earth Movement		PD/BI Combined	Amount	Annual Aggregate	222222	[Edit]
Sub Limits	Flood		PD/BI Combined	Amount	Annual Aggregate	2222	[Edit]
Sub Limits	Named windstorm		PD/BI Combined	Amount	Annual Aggregate	Amount	[Edit]
Sub Limits	Terrorism		PD/BI Combined	Amount	Annual Aggregate	22222	[Edit]
Sub Limits	Communicable Disease R...		NCP (No Coverage Pro ...)				[Edit]
Sub Limits	Contingent Time Element ...		BI only	Amount	Annual Aggregate	Amount	[Edit]
Sub Limits	Contingent Time Element ...		BI only	Amount	Annual Aggregate	1222	[Edit]
Sub Limits	Course of Construction		PD only	Amount	Per Occurrence	22222	[Edit]
Sub Limits	Debris Removal		PD only	Amount	Per Occurrence	22222	[Edit]
Sub Limits	Demolition And Increased ...		PD only	Amount	Per Occurrence	1111111	[Edit]



# Endorsement

# 07



# Endorsement – Create an Endorsement 1

The screenshot shows the 'Policy Manager' interface. At the top, there's a header for 'Property - PR006817.1' with a sub-header 'Property Damage & Business Interruption'. Below this, there are filters for 'Issuing Country' (All) and 'Policy Status' (All). Two policy cards are displayed: 'NLD\_Master\_PR\_24866' (Integrated Master Policy) and 'USA\_Local\_PR\_24870' (Integrated Local Policy). Both cards show details like Policy Type, Policy Period, and Policy Limit. A red circle with the number 1 is placed over the 'Create Endorsement' button on the NLD policy card.

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

The 'Create Endorsement' dialog box is shown. It has a title bar with a close button. The 'Effective Date' is set to '1 Feb 2021'. Under 'Reason for Endorsement', there are several checkboxes: 'Change in Policy Party', 'Change in Exposure', 'Change in Terms & Conditions', 'Change in Policy Period', 'Change in Clauses' (which is checked), 'Cancellation of Policy', and 'Other'. Below this is an 'Additional Information' field with the text: 'We received new information from the global client and therefore need to adjust the clauses of the local policy'. At the bottom, there are two buttons: 'CANCEL' and 'CREATE ENDORSEMENT'. A red circle with the number 2 is placed over the 'CREATE ENDORSEMENT' button.

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

# Endorsement – Create an Endorsement 2

Germany, Local Policy Other Policies (2) Documents (0)

Policy Status: Prospect Change

Program Currency (EUR) Policy Currency (EUR)

Policy Parties Policy Information Premium Information Terms & Conditions Policy Risk Local Service Additional Comments

Collapse All Sections

Global Client

Headquarter Country Netherlands (the) Legal Entity

Producing Carrier

Producing Country Producing Carrier Company Program Team

DOWNLOAD ENDORSEMENT REQUEST PREVIOUS SAVE SEND TASK

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

Producing Carrier  
Knowledge Base  
User Management  
Reporting

DEU E&C - EC006852.1\_END\_DEU\_100002842 - Endorsement Review New  
Due on : 9 Jun, 2023

**Endorsement Review** 1 Chat Documents (0) Task History

END - 100002842  
**New** Action Required By: [redacted]

Kicked Off Date: 7 Jun, 2023 Due On: 9 Jun, 2023  
Originator: IPaaS Task Owner: [redacted]  
User: [redacted]

**Details**

Program Name: E&C Line Of Business: Engineering & Construction Local Client: -  
Program ID: [redacted] Producing Office: [redacted] Local Carrier Team: [redacted]  
Policy ID: DEU\_Local\_EC\_25035 Country Of Risk: Germany Issuing Entity: [redacted]

**Description**

Endorsement Review Details - Germany

Normal Sans Serif B I U A [redacted] [redacted] [redacted] [redacted] [redacted] [redacted] [redacted] [redacted]

DOWNLOAD ENDORSEMENT REQUEST PREVIOUS CANCEL

**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

PREMIUM INFORMATION

Local Premium Information ▼

**! Premium Bearing**

Is the endorsement premium bearing?

Yes

No

Are updates to the original deductions required?

Yes

No

[CONTINUE](#)

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

The screenshot displays the 'Policy Manager' interface for 'Property - PR006817.1'. The left sidebar shows navigation options like 'Producing Carrier', 'Knowledge Base', 'User Management', and 'Reporting'. The main content area is titled 'Policy Manager > Policy Overview' and shows a list of policies under the heading 'Policies'. Two policies are visible: 'NLD\_Master\_PR\_24866' (Integrated Master Policy) and 'USA\_Local\_PR\_24870' (Integrated Local Policy). Both policies are marked as 'Prospect Property'. The 'USA\_Local\_PR\_24870' policy details show a legend for endorsement tasks: 'Local Policy Review' (green dot), 'Premium Collection' (green dot), 'Invoice Issuance' (orange dot), and 'Endorsement Review' (yellow dot). The 'Endorsement Review' task is circled in red with a '1' in a red circle below it.

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

Producing Carrier > Account Overview

ADD NEW CLIENT ACCOUNT

ALL CLIENT ACCOUNTS

Search

20 Jan, 2021

Active

**Food Company**  
25 Jan, 2021  
Active

**Test Account 1**

**Food Company**

OVERVIEW TASKS **CLAIMS**

CREATE CLAIM

Claim ID	Program Name	Policy Name	LOB	Date Of Loss	Country	Status	Paid	Reserved
CLM_000066_1797_...	Food Company - Pr...	USA_Local_PR_172...	Property	13 Jan, 2021	United States of A...	New	100000.00	100000.00
CLM_000067_1797_...	Food Company - Pr...	USA_Local_PR_172...	Property	13 Jan, 2021	United States of A...	Open	100000.00	100000.00

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

**Claim** [VIEW ALL CLAIMS](#)

New Status:  Effective Date:

- > Program & Policy
- > References
- > Contacts
- > Claim Details
- > Claim Representatives **1**
- > Financial Summary **2**
- > Additional Information From Servicing Carrier
- > Additional Information From Producing Carrier

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.

Claim CLM\_000454\_18851\_CA [VIEW ALL CLAIMS](#) [CHAT](#)

Claim Status: New Effective Date: 12 May, 2023 New Status: New

1 STATUS HISTORY

12 May, 2023 **New**  
Effective Date: 12 May, 2023  
Updated by: [Redacted]

Hide

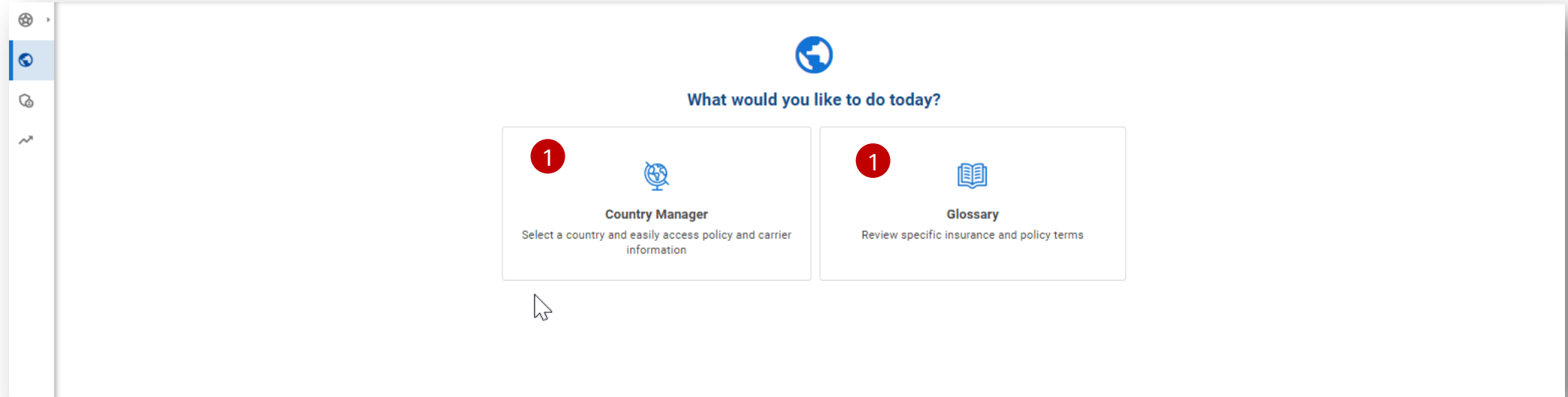
- Documents
- Program & Policy
- References
- Contacts
- Claim Details
- Claim Representatives
- Financial Summary

DEACTIVATE UPDATE

# 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

KB Home > Country Selection

Select a country to learn more  
Select multiple countries to create a comparison report

Search country by name/iso code

Regions Countries

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL

### Asia Pacific

American Samoa	Antarctica	Australia	Bangladesh	Bhutan	British Indian Ocean Territory (the)
Brunei Darussalam	Cambodia	China	Christmas Island	Cocos (Keeling) Islands (the)	Cook Islands (the)
Fiji	French Polynesia	French Southern Territories (the)	Guam	Heard Island and McDonald Islands	Hong Kong
India	Indonesia	Japan	Kiribati	Korea (the Democratic People's Republic of)	Korea (the Republic of)
Lao People's Democratic Republic (the)	Macao	Malaysia	Maldives	Marshall Islands (the)	Micronesia (Federated States of)
Mongolia	Myanmar	Nauru	Nepal	New Caledonia	New Zealand
Niue	Norfolk Island	Northern Mariana Islands (the)	Palau	Papua New Guinea	Philippines (the)
Pitcairn Islands	Samoa	Singapore	Solomon Islands	Sri Lanka	Taiwan (Province of China)
Thailand	Timor-Leste	Tokelau	Tonga	Tuvalu	United States Minor Outlying Islands (the)
Vanuatu	Viet Nam	Wallis and Futuna			

### Europe, Middle East and Africa

CONTINUE

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)

KB Home > Country Selection > Report Filters

### Select filters to create reports

Valid As Of \*  
23 May 2023

4 ✓ Base Report Full Dataset Report

1 Countries\* ✓ 1 selected  
Portugal X  
+ ADD MORE COUNTRIES NEXT

2 Lines Of Business\* 1 ⚠ 0 selected

3 Carriers 2 ⚠ 0 selected

4 Categories\* 3 ✓ 9 selected

CONTINUE

# Country Manager – Country

KB Home > Country Selection > Report Filters > Base Report

**Base Report**  
Valid As Of - 23 May 2023

**Selected Country**  
PRT

PROPERTY CASUALTY DIRECTORS & OFFICERS ENGINEERING & CONSTRUCTION

Carriers

(Portugal)

Legal Name Address

Financial Rating Office hours & Time zone

Search For

Legend  
Axco Carrier P&N

Question Portugal

> General Considerations	11 Questions
> Business Rule	1 Question
> Coverage	9 Questions
> Brokers	2 Questions
> Premium	12 Questions
> Reinsurance	4 Questions

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.

The screenshot displays the 'Base Report' for a carrier in Portugal. The breadcrumb trail is 'KB Home > Country Selection > Report Filters > Base Report'. The report is valid as of 23 May 2023. The selected country is Portugal (PRT). The main section is 'PROPERTY'. A red circle '1' highlights an eye icon next to the carrier name '(Portugal)'. A red circle '2' highlights the 'Local Office Information' section, which includes fields for Legal Name, Address, Financial Rating, and Office hours & Time zone. A red circle '3' highlights the 'ATTACHMENTS' section, which contains a table of documents. A blue arrow points to the text 'Different LoBs' near the carrier name. A legend on the right side shows 'Axco', 'Carrier', and 'P&N' with checkboxes. The table below the legend lists questions: 11 Questions, 1 Question, 9 Questions, 2 Questions, 12 Questions, and 4 Questions.

**Base Report**  
Valid As Of - 23 May 2023

**Selected Country**  
PRT

**PROPERTY** CASUALTY DIRECTORS & OFFICERS ENGINEERING & CONSTRUCTION

**Carriers**

(Portugal) **1**

Legal Name Address  
Financial Rating Office hours & Time zone

**Local Office Information 2**

Legal Name Address  
Financial Rating Office hours & Time zone

**International Capabilities**

Office Type Policy Limit  
Network Partner -

Policy Type

**Commission 2**

New Business Renewal  
USD per local policy for gross written premium up to... USD per local policy for gross written premium up to...

Non-standard Policy  
As per Contract

**Contacts**

ST SDM Team

**ATTACHMENTS 3**

Document Name	Date Modified	Document Type	Country	Tag(s)	Action
Property_Local_Quote_Reques...	28 March 2023	-	Portugal		

**Legend**

✓ Axco ✓ Carrier ✓ P&N

11 Questions  
1 Question  
9 Questions  
2 Questions  
12 Questions  
4 Questions

# Country Manager – Country

Type of Report

Date of Report

- 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.**

More information

# Comparison Report

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

The screenshot shows a web interface for selecting report filters. The breadcrumb trail at the top reads 'KB Home > Country Selection > Report Filters'. The main heading is 'Select filters to create reports'. Below this, there is a 'Valid As Of' section with a date picker set to '23 May 2023' and a calendar icon. To the right of this section are two radio buttons: 'Base Report' (selected) and 'Full Dataset Report'. The main filter area consists of four sections, each with a step indicator on the left and a selection count on the right:

- 1 Countries\***: Shows 'Portugal' and 'Switzerland' as selected items. Below them is a button '+ ADD MORE COUNTRIES' with a red '1' next to it. A 'NEXT' button is on the right.
- 2 Lines Of Business\***: Shows '4 selected'.
- 3 Carriers**: Shows '2 selected'.
- 4 Categories\***: Shows '9 selected'.

A mouse cursor is visible near the bottom center of the interface. A 'CONTINUE' button is located at the bottom right corner.

# Comparison Report

KB Home > Country Selection > Report Filters > Base Report

### Base Report

Valid As Of - 23 May 2023

**Selected Countries**

PRT + CHE 1

PROPERTY CASUALTY DIRECTORS & OFFICERS ENGINEERING & CONSTRUCTION

Carriers

Search For

Legend: Axco Carrier P&N

Question: Portugal Switzerland

General Considerations 1 15 Questions

Are the KYC / AML requirements required prior to local policy issuance	- 1	Yes, During policy issuance 1
Is backdating of cover permissible	-	Yes
What notice period must insurer give to cancel a policy?	30 days following two claims in 12 months, at any time "for just cause"	90 days
Tacit Renewal - does tacit renewal apply?	Yes, 60 days	Yes, 93 days notice of cancellation required
Does this country have Freedom of Services capability (EU only)?	Yes	Not applicable

2 EXPORT

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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

← Glossary of Terms

Begin typing to filter

**Filter by Tag**

**Line of Business**  
All Property

**Category**  
All Coverages ONE Form Policy Wording Premium Program Structure

**Subcategory**  
All Coverages Local Deductions Local Tax Calculation Master Solution  
Property Damage Structuring Requirement Screen Tax

**Have a Suggestion?**  
Please contact [ipa\\_digital@swissre.com](mailto:ipa_digital@swissre.com) to recommend a new glossary term or a revision to an existing entry.

**Accounts Receivable**  
To pay for uncollected Accounts Receivable when due to loss of the insured's record

**Data Source**  
CorSo

**Tags**  
Property, ONE Form, Policy Wording, Coverages, Property Damage

Last Modified Nov 16, 2020

**Admitted Insurance Coverage**  
Insurance coverage provided by an insurer that is licensed to conduct insurance business in the country where the risk is located.

**Location**  
Worldwide

**Data Source**  
CorSo

**Tags**  
Program Structure, Master Solution, Structuring Requirement Screen

**Admitted (DIC/DIL)**  
Local Risk is covered by a local policy and the Master provides DIC/DIL coverage on an Admitted (e.g. FoS) or "Permissible Non Admitted" basis

**Admitted (Master)**  
Local Risk is covered 100% via the Master (no local policy in place) on an Admitted (e.g. FoS) or "Permissible Non Admitted" basis

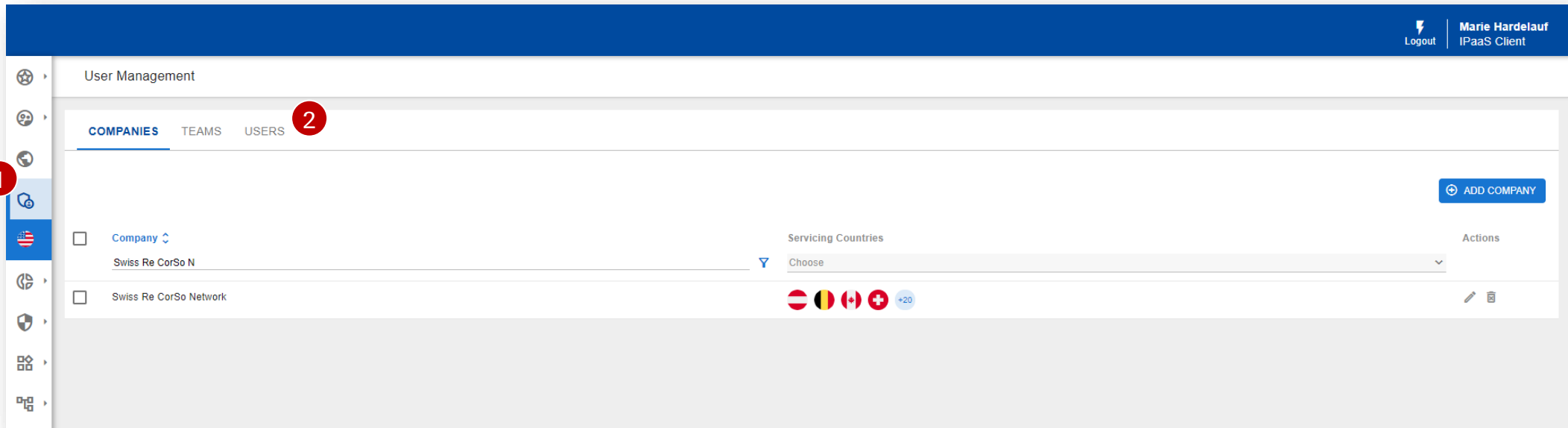
The Glossary module includes different definitions of terms used within the PULSE Application. A user can filter terms by using the tags **1** or search a specific term in the keyword search **2**

# User Management

# 10

# User Management

Only Applicable for Admin Users

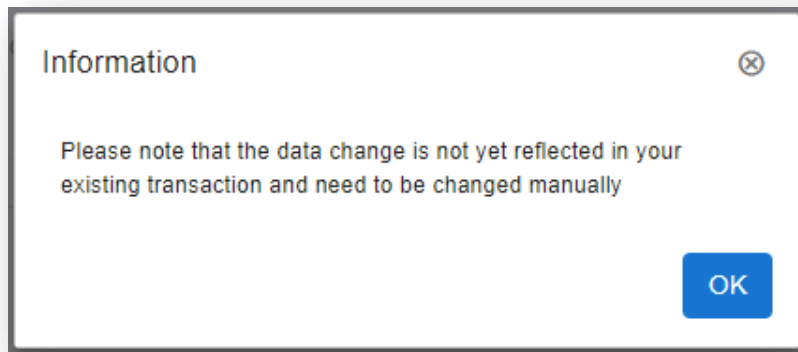


The screenshot displays the User Management interface. At the top right, the user is identified as Marie Hardelauf, an IPaaS Client, with a Logout button. The left-hand navigation pane contains several icons, with the 'User Management' icon highlighted and marked with a red circle '1'. The main content area shows the 'COMPANIES' tab selected, with 'TEAMS' and 'USERS' tabs also visible. A red circle '2' is placed over the 'COMPANIES' tab. Below the tabs, there is a table of companies. The first row is 'Swiss Re CorSo N' and the second is 'Swiss Re CorSo Network'. The 'Swiss Re CorSo N' row has a 'Servicing Countries' dropdown menu set to 'Choose' and a list of country flags (Austria, Belgium, Canada, Switzerland) with a '+20' indicator. An 'ADD COMPANY' button is located in the top right corner of the table area. The 'Actions' column for each row contains edit and delete icons.

- 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

COMPANIES TEAMS USERS

Company  Swiss Re CorSo N

Swiss Re CorSo Network

Servicing Countries Choose

Actions  1

Company Overview 2

Last Modified  
Jan 26, 2021 by Marie\_Hardelauf@rcomext.com

Company Name  
Swiss Re CorSo Network

Address Line 1  
Mythenquai 50

Address Line 2

City State

Zip Code Country  
8001 Switzerland

Network Capabilities

Network Organizations  
Swiss Re CorSo Network

Servicing Countries 3  
24 items selected

sweden

Sweden

- 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

The screenshot displays a user management interface with three main sections:

- Top Section (Team Overview):** A table with columns: Teams, Primary Contact, Members, Company, and Actions. It lists two teams: "Swiss Re CorSo Network Team" (Primary Contact: TestSC cqatuser, Members: 3, Company: Swiss Re CorSo Network) and "Swiss Re Servicing Carrier Team" (Primary Contact: Manasa Reddy, Members: 11, Company: Swiss Re Servicing Carrier). An "ADD TEAM" button is in the top right. A red circle labeled '1' highlights the edit and delete icons in the Actions column.
- Middle Section (Team Details):** A modal for "Swiss Re CorSo Network Main Team". It shows the company name, a "Point of Contact" field with "Abhinav Sharma" (marked with a red circle '3'), and a "Last Modified" date of "Jan 26, 2021 by Marie\_Hardelauf@rcomext.com". An "ADD MEMBER" button is in the top right (marked with a red circle '2').
- Bottom Section (Team Members):** A table with columns: Name, Email, Roles, and Actions. It lists two members: "Abhinav Sharma" (Email: Abhinav\_Sharma@rcomext.com) and "Amer Mohammed" (Email: Amer\_Mohammed@swisre.com). A "Choose" dropdown is visible under the Roles column.









- 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

COMPANIES TEAMS <b>USERS</b>						
<input type="checkbox"/>	Name ↕	Email ↕	Company ↕	Teams	Roles	Actions
<input type="checkbox"/>	_____	_____	_____	_____	Producing Carrier	
<input type="checkbox"/>	Servicing Carrier Automation	cqa-automation-sb@swissre.com	A to C Carrier Company		Servicing Carrier Producing Carrier	   
<input type="checkbox"/>	Pallavi Joshi	Pallavi_Joshi@rcomext.com	Carrier-5678	EPIC Team 1 EPIC Team 2 G to I Broker Company - Team Global Broker Team	Knowledge Base Company Admin Servicing Carrier Producing Carrier	   

**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 user asking to reset the password
-  **Activate** – Retriggers an Okta activation email to users, where the activation link has expired.

# User Management – User Profile

**User Profile** Last Modified  
Jan 8, 2021 by Marie\_Hardelauf@rcomext.com

**First Name** • Marie

**Last Name** • Hardelauf

**User Name** • Marie Hardelauf

**Email** • Marie\_Hardelauf@rcomext.com

Phone

**Company Name** • 1

IPaaS Client

**Team** IPaaS Team

**Role** • 2  
Company Admin, Producing Carrier, Knowledge Base

**Address Line 1** Mythenquai 50/60

Address Line 2

**City** Zürich **State**

**Zip Code** 8002 **Country**

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

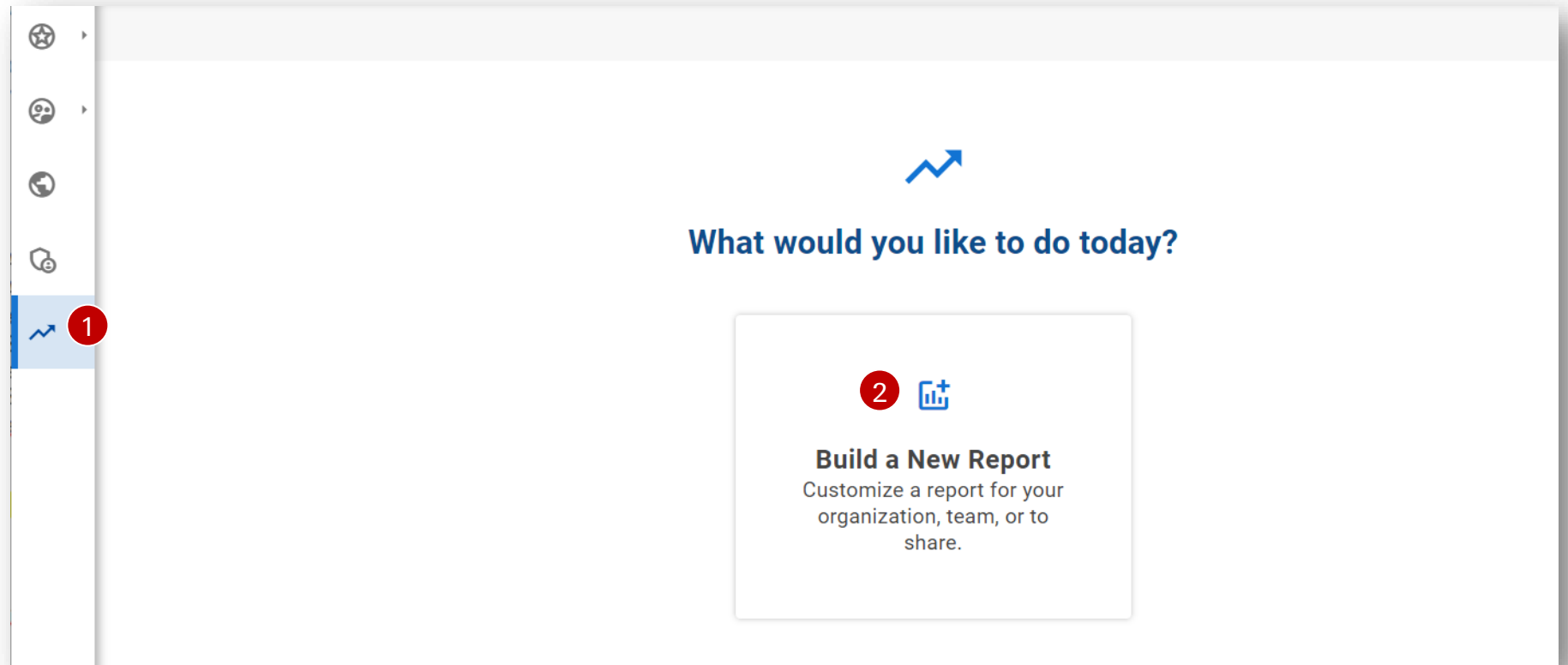
# 11



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

To build a new a report:

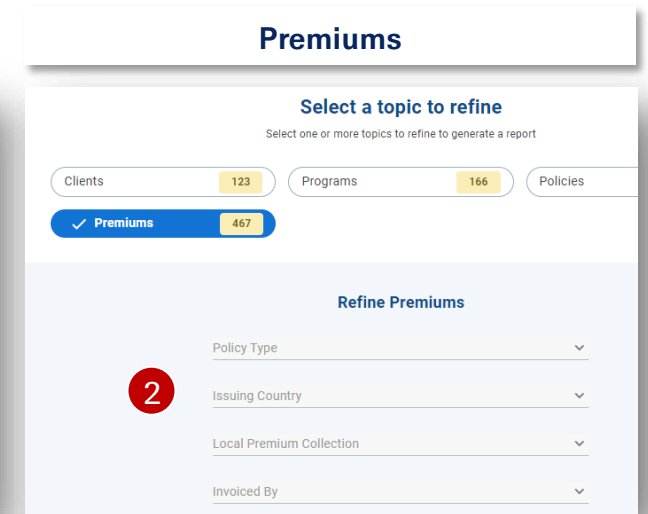
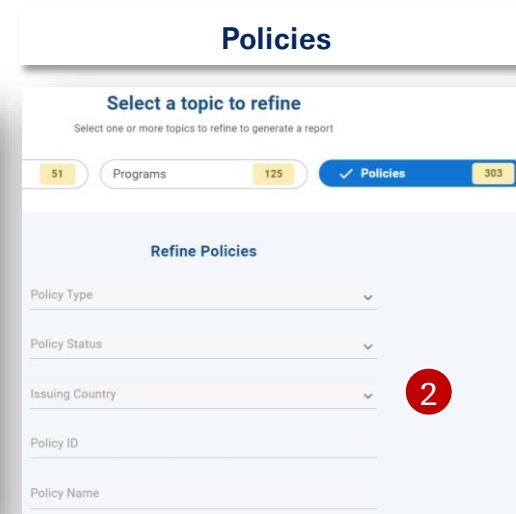
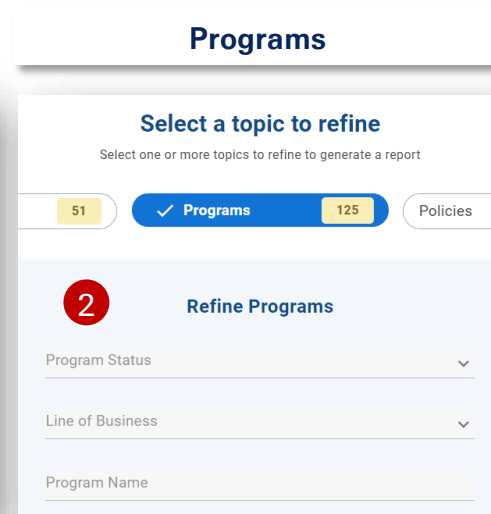
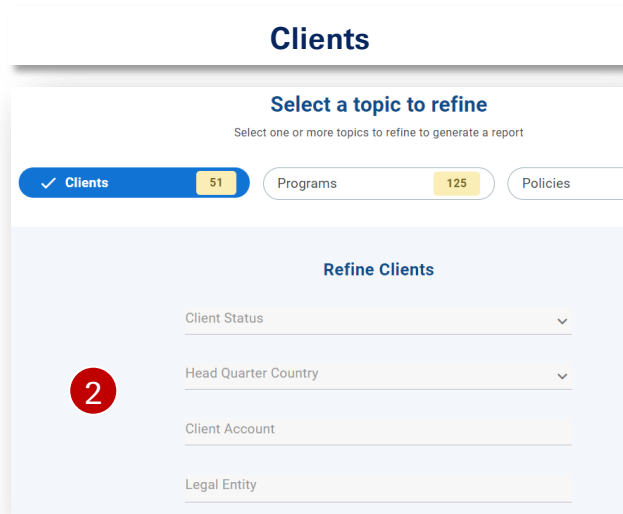
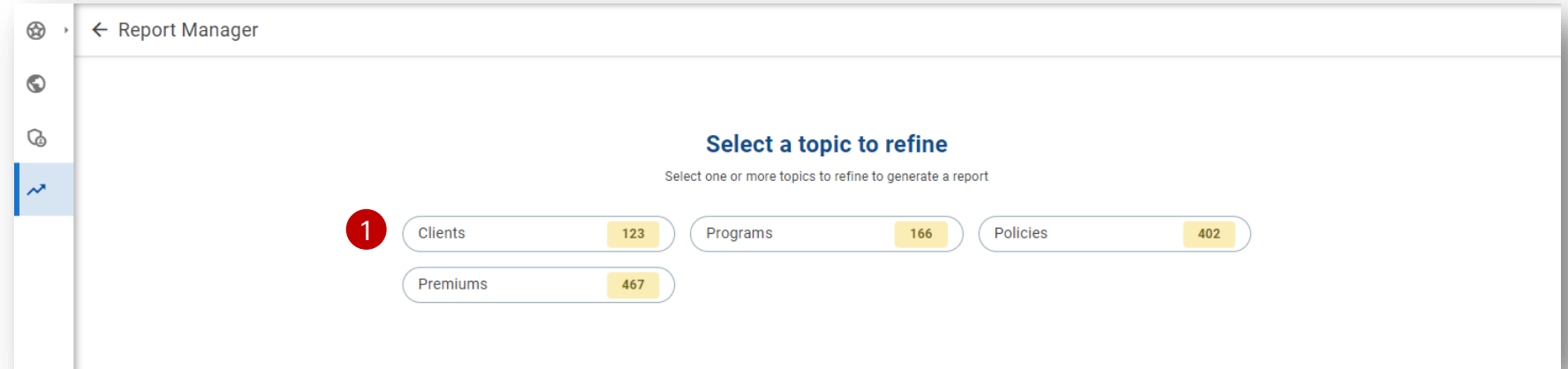
- 1 Select the report icon
- 2 Click on 'Build a New Report'



# 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.



# 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.

### Refine Data View

---

Include All

Program Name       Program ID      **1**  Program Status

Line of Business       Main Coverage       Program Currency

Inception Date       Expiration Date       Program Owner

Program Created

**2** [GENERATE DATA](#)

# Report:

- 1 Review your report on screen.
- 2 Export your report in Excel format.

Report Manager

### Insurance Portfolio Report - Programs 1

2 [EXPORT REPORT](#)

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	D0000172.1	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

Showing 1 to 50 of 125 entries | 1 2 3 > >| 50 ▼

# Renewals

# 12

# 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.**

Test123

OVERVIEW TASKS CLAIMS

Account Information

Account Name: Test123 Account Owner: Lukas Manz

International Programs

UW Year: Future, Current

Test123 Property (PR000199.1) Active

Producing Country: CHE Local Countries (6): USA, FRA, DEU, HKG, +2

Client Legal Entity: Test123

Program Period: 31 Dec 2020 - 31 Dec 2021

Coverage Type: Property Damage & Business Interruption

Program Owner: Lukas Manz

Open Program Edit Program Renew



# Renewals

Update the Program information.

- 2 Check/update the dates of your renewal program
- 3 Afterwards, click on Initiate Renewal

Producing Carrier > Renew Program

**Program - Overview**

Program Status\* Active Created Date 29 Oct 2021, 11:33, GMT+1

Program Name\* Test123

Program Owner\* Lukas Manz

Program Team\* Galit Sabbagh

Line of Business\* Property Coverage Type\* Property Damage & Business Interruption

Program Currency\* CHF Industry Classification

Inception Date\* 31 Dec 2021 Inception Time\* 00:00 Time Zone\* CET (UTC+01)

Expiration Date\* 31 Dec 2022 Expiration Time\* 00:00 Time Zone\* CET (UTC+01)

Comments

**Insured legal Entity** Add Legal Entity

Headquarter Country\* Switzerland

Legal Entity\* Test123 Edit

Address  
Main Street 1  
Zurich  
Switzerland  
12345

**Program - Client Contact**

Client Contact\* Test

Address  
Main Street 1  
Zurich  
Switzerland  
12345

Email

Phone

VIEW ADDITIONAL CONTACTS

CANCEL 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.

Future, Current

**Test123**  
Property (PR000199.1) Active

4 **Renewal Process has been initiated.**

Client Legal Entity: Test123  
Program Period: 31 Dec 2020 - 31 Dec 2021  
Coverage Type: Property Damage & Business Interruption  
Program Owner: Lukas Manz

[Open Program](#) [Edit Program](#)

Producing Carrier > Account Overview

ALL CLIENT ACCOUNTS

Search

Vic\_MX  
22 Oct, 2021  
Active

[FA] Renewals\_Test  
22 Oct, 2021  
Active

PK 21-10 cr  
21 Oct, 2021  
Active

RK Corporations  
14 Oct, 2021  
Active

Venus test account  
14 Oct, 2021  
Active

Fernando\_Account  
12 Oct, 2021  
Active

Account 110  
1 Oct, 2021  
Active

Vauben Test Account

**Test123**  
OVERVIEW TASKS CLAIMS

Account Information

Account Name: Test123  
Account Owner: Lukas Manz  
Account Team: Galit Sabbagh

International Programs

UW Year: Future, Current

6 **old program**

**Test123**  
Property (PR000199.1) Active

Producing Country: CHE  
Local Countries (6): USA, FRA, DEU, HKG, +2

Client Legal Entity: Test123  
Program Period: 31 Dec 2020 - 31 Dec 2021  
Coverage Type: Property Damage & Business Interruption  
Program Owner: Lukas Manz

[Open Program](#) [Edit Program](#)

**new program**

**Test123**  
Property (PR000199.2) Draft

Producing Country: CHE  
Local Countries (6): USA, FRA, DEU, HKG, +2

Client Legal Entity: Test123  
Program Period: 5 31 Dec 2021 - 31 Dec 2022  
Coverage Type: Property Damage & Business Interruption  
Program Owner: Lukas Manz




[Open Program](#) [Edit Program](#)

# Renewals

Policy Manager > Policy Overview

▼ Policies

Issuing Country: All | Policy Status: All

Policy ID	Policy Type	Policy Period	Policy Limit (EUR)	Service Details
 BEL_LOCAL_PR_1100	Integrated Local Policy	31 Dec 2021 - 31 Dec 2022	0	Servicing Carrier: - Producing Broker: - Servicing Broker: -
 FRA_LOCAL_PR_1098	Integrated Local Policy	31 Dec 2021 - 31 Dec 2022	0	Servicing Carrier: - Producing Broker: - Servicing Broker: -
 DEU_LOCAL_PR_1096	Integrated Local Policy	31 Dec 2021 - 31 Dec 2022	0	Servicing Carrier: - Producing Broker: - Servicing Broker: -

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

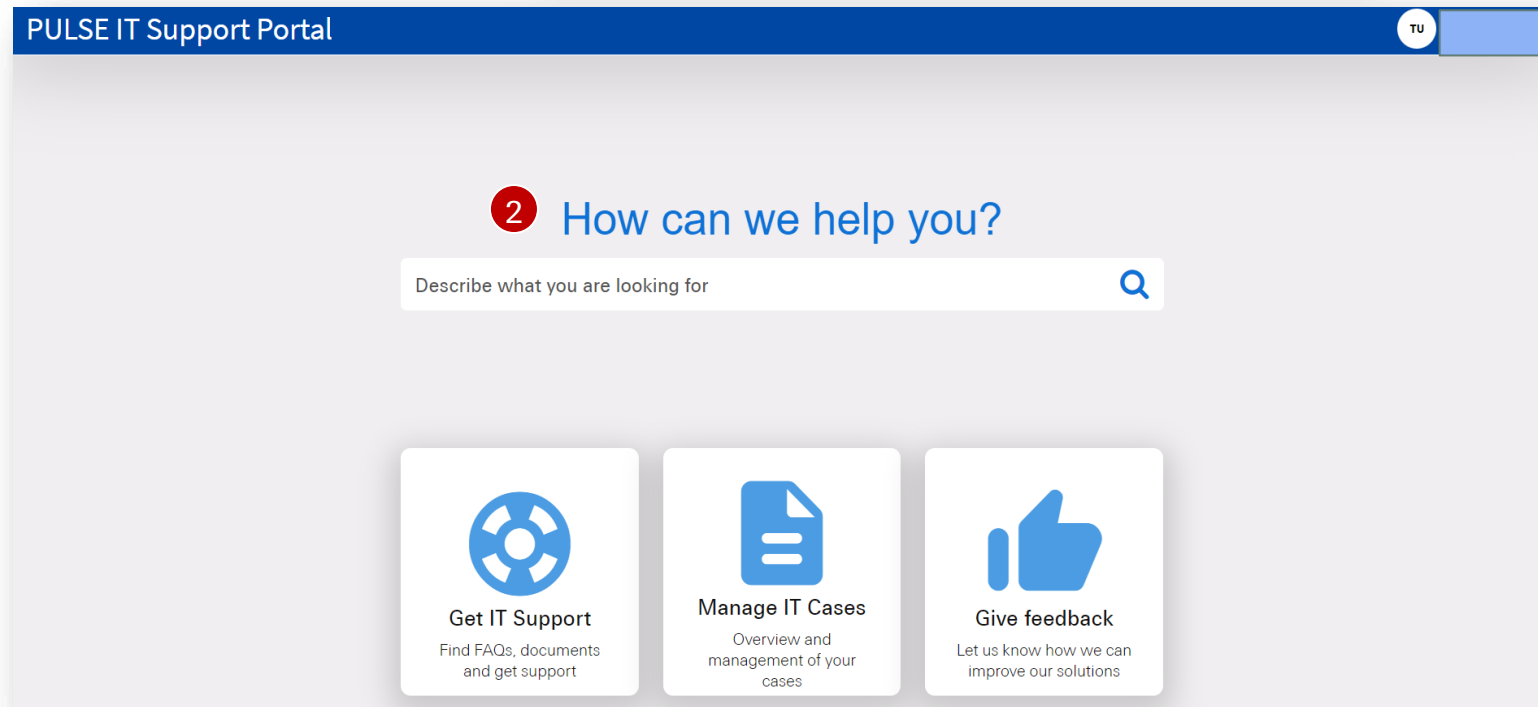
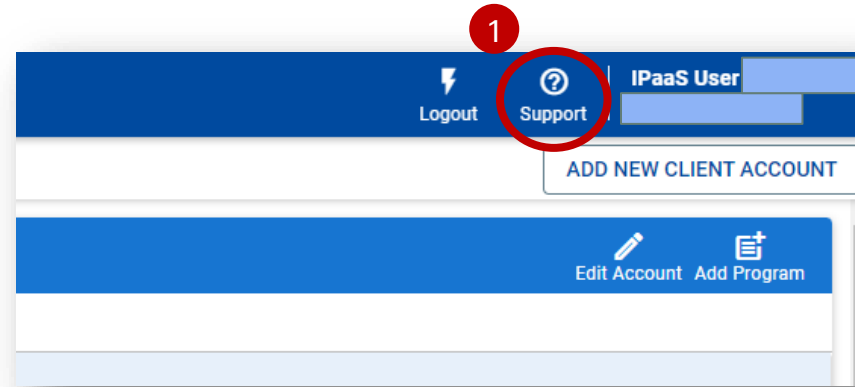
Please be aware that Premium information is not automatically copied and the tasks must be retrigged.

# Support Portal

# 13

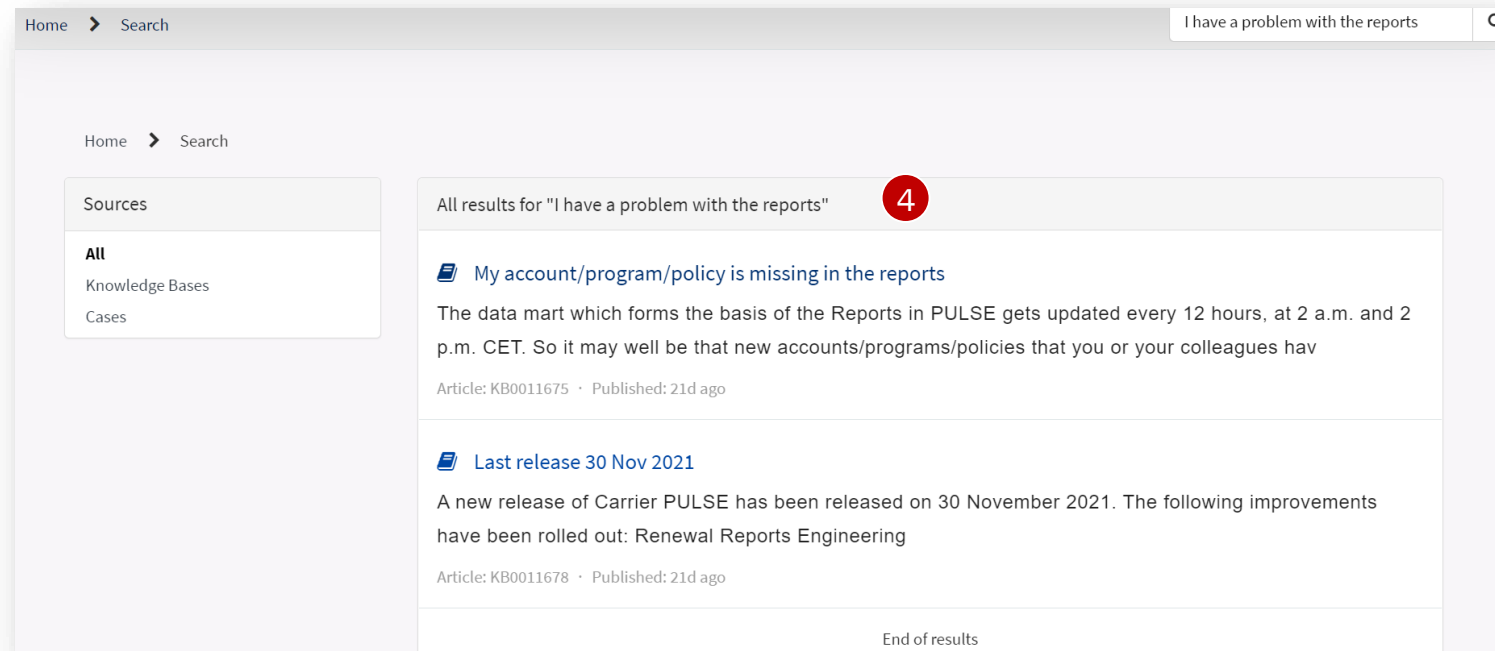
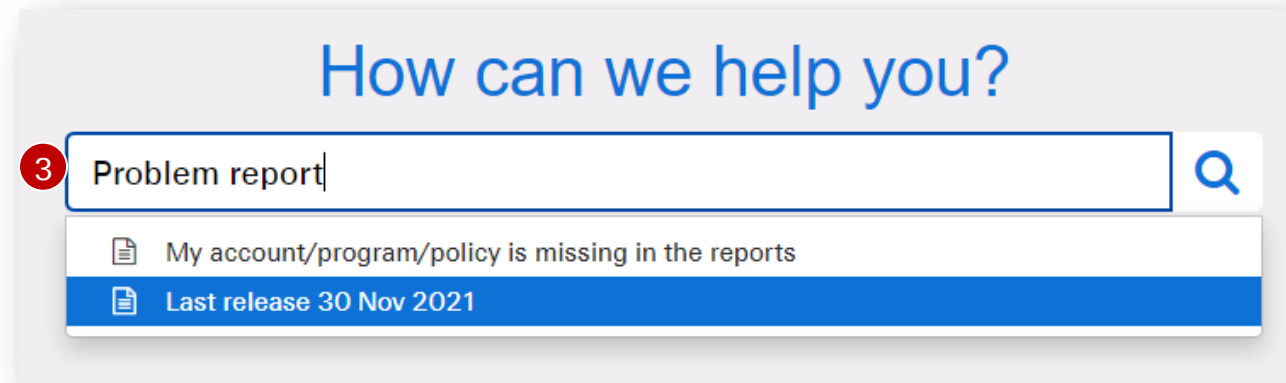
# PULSE IT Support Portal:

- 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

KB0011675 - Latest Version

## 5 My account/program/policy is missing in the reports

Revised by Jürgen Prange • 21d ago • 9 Views • ★★★★★

The data mart which forms the basis of the Reports in PULSE gets **updated every 12 hours**, at 2 a.m. and 2 p.m. CET.

So it may well be that new accounts/programs/policies that you or your colleagues have created during the last few hours do not yet show up in the respective report. The same applies to recent data changes.


Kindly wait until the next data refresh occurs in the background, then re-run your report.

[Copy Permalink](#)

Helpful?   100% found this useful 6 Rate this article ☆☆☆☆☆

**TU** Click here to comment on this article...

Comments (Latest comment 15d ago by TestPC uatuser)

**TU** TestPC uatuser • 15d ago 

This has been very helpful thanks.



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

Still need help?

CREATE NEW CASE **1**

Most viewed resources

- My account/program/policy is missing in the reports  
 10 Views
- I cannot work on a program while It is being renewed  
 5 Views

Create a Case

Contact support to make a general request or to report a problem on PULSE Portal

**2** \*Request Type  
-- None --

\*Subject

\*Description

URL **3**  
If available, please share the URL of the screen in which you are facing the issue. This will support us in resolving your issue more efficiently.

**4** Submit

Required information  
**Request Type** **Subject** **Description**

Add attachments

# 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)

## Create a Case

Contact support to make a general request or to report a problem on PULSE Portal

\* Request Type

-- None --


1 System Functionality

2 Data Correction

3 Feedback

URL ?

If available, please share the URL of the screen in which you are facing the issue. This will support us in resolving your issue more efficiently. ✕

 Add attachments

Submit

Required information

Request Type Subject Description

# 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

The screenshot displays the PULSE IT Support Portal interface. At the top, a search bar asks "How can we help you?" with a search icon. Below the search bar are three main navigation cards: "Get IT Support" (with a lifebuoy icon), "Manage IT Cases" (with a document icon and a red '1' badge), and "Give feedback" (with a thumbs-up icon). Below these cards, there is a "Filter" sidebar on the left and a "My queries" table on the right. The "Filter" sidebar shows options for "All (2)", "Open (1)", and "Closed (1)", along with a "CREATE NEW CASE" button. The "My queries" table lists two cases with columns for Number, Short description, Product, Account, Priority, State, and Updated.

Number	Short description	Product	Account	Priority	State	Updated
CS0018783	Problem with Submission - Demo		Swiss Re CorSo Network	3 - Moderate	Open	2022-01-11 11:00:56
CS0017748	Casualty LoB not found when adding a program		Swiss Re CorSo Network	3 - Moderate	Closed	2021-12-23 04:26:32

# 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.

The screenshot displays the PULSE IT Support Portal interface for a specific ticket. The header shows the portal name and navigation links: Home > Manage queries > Ticket: CS0018783. The main content is divided into several sections:

- Case details (1):** A blue header section containing a table with the following information:

Number	CS0018783
Priority	3 - Moderate
State	Open
Updated	just now
- Actions:** A blue header section with a single button labeled "Close case".
- Attachments (2):** A blue header section with a paperclip icon. It displays a document attachment: "DocumentToUploadDuringDemo.docx (20.2 KB)" with edit and delete icons, and a timestamp "2m ago".
- Communication History (3, 4):** A vertical timeline on the right side of the page. At the top, there is a text input field "Type your message here..." and a "Send" button. The history consists of four messages from "TestPC uatuser":
  - Message 1 (3): "I would like to indicate that the incident happened yesterday." (Timestamp: just now)
  - Message 2 (4): "I could not send the documents attached - Demo" (Timestamp: 1m ago)
  - Message 3: "DocumentToUploadDuringDemo.docx 20.2 KB" (Timestamp: 2m ago)
  - Message 4: "CS0018783 Created" (Timestamp: 1m ago)

# 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

How can we help you?

Describe what you are looking for

**Get IT Support**  
Find FAQs, documents and get support

**Manage IT Cases**  
Overview and management of your cases

**Give feedback**  
Let us know how we can improve our solutions

Feedback

We welcome any feedback you have on our Digital Solution

\*Subject

\*Description

Add attachments

Submit

Required information

Subject Description

If you need to speak with someone in person? Find the best number for your location below.

If none of these numbers does not work, try the next nearest location to you:

United States:	+1 914 828 2170
Brazil:	+55 113 073 8443
Mexico:	+52 555 322 4110
Hong Kong SAR:	+852 227 750 03
Switzerland:	+41 43 285 3933
Germany:	+49 893 844 1010

# 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.

The image shows a composite of two screenshots. On the left is the Okta login page, and on the right is the PULSE Login Support Portal overlay.

**Okta Login Page:**

- Logo: **okta**
- Placeholder:
- Text: **Sign In**
- Form: Username [ ]
- Form: Password [ ]
- Checkbox:  Remember me
- Button: **Sign In**
- Link: [Need help signing in?](#) (circled in red)
- Link: [Forgot password?](#)
- Link: [Help](#) (circled in red)

**PULSE Login Support Portal:**

- Header: **PULSE Login Support Portal**
- Section: **Helpful Information**
- Search: Search...
- Article 1: **I've changed my smartphone and Okta Verify doesn't work anymore. What should I do?** (17 Views)
- Article 2: **Why am I not receiving Okta Verify push notifications on my smartphone anymore?** (3 Views)
- Article 3: **Why am I receiving "Unable to Sign In" error message?** (2 Views)
- Article 4: **I've forgotten my password. How do I reset it?** (1 Views)
- Article 5: **Why does Pulse utilize Okta Verify as the primary MFA solution?** (1 Views)
- Navigation: |← Previous
- Footer: Showing items 1 - 5 of 8
- Section: **Still need help?**

# 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.

Still need help? 4 [Contact us](#)


**Message us** 5

Can't find an answer in the support portal? Create a query and one of our experts will get in touch to assist you

Corporate Email  Phone number (include international dialing code)

Subject

Description of the issue

I'm not a robot  reCAPTCHA  
Privacy - Terms

6



# Client Portal

# 14

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

The screenshot shows the 'Client Portal > Insurance Portfolio' page. At the top left, a navigation menu is visible with a red circle '1' next to the 'Client Portal' icon. The main header area contains the client name 'Mercedes' with a dropdown arrow and a red circle '2' above it, and the main contact information 'Main Contact: GermanDemo Us...' with a phone icon and number '44999887799' and an email icon, with a red circle '3' above the client name. Below the header, there is a section for 'International Programs (2)' with filters for 'Line Of Business' and 'Status', both set to 'Select'. Two program cards are displayed: 'Property 2022 - Mer...' (Active) and 'Property 2023 - Mer...' (Draft). Each card shows 'Producing Country' (DEU) and 'Local Countries (10)' (BRA, SWE, CHE, CAN, +6). Below the cards, there is a table with columns for 'Global Insurer', 'Coverage Type', 'Program period', and 'Program Owner'. At the bottom, there is a blue bar with a red circle '6' and an 'FNOL' button. A red circle '4' is placed over the program cards, a red circle '5' is over the 'Open Program' button, and a red circle '1' is over the navigation menu.

- 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

Client Portal > Property 2022 - Mercedes

< Back

## Property 2022 - Mercedes

DEU - EUR  
Country - Currency

Main Contact: GermanDemo Us...  
44999887799

PR001114.1	Premium	Tax	Total premium
01 Jan 2022 - 01 Jan 2023	EUR 226,480	EUR 0	EUR 226,480

Filter By

Policy Issued In: Select  
Policy Status: Select  
TIV/Limit: EUR 0 - EUR 0  
[Clear Selection](#)

Policy Trends

### Policy Status

Policies: 5  
TIV/Limit: -

### List of Policies (5)

Issued In (Country) ↓↑	Policy Number ↓↑	Effective ↓↑	Expiration ↓↑	TIV/Limit ↓↑	Premium ↓↑	Tax ↓↑	Total Premium ↓↑	Policy Status ↓↑
> Germany	DEU_MASTER_PR_2945 (Te...	01 Jan 2022	01 Jan 2023	---	EUR 0	EUR 0	EUR 0	Prospect
> South Korea	KOR_LOCAL_PR_2947 (Tempor...	01 Jan 2022	01 Jan 2023	---	EUR 0	EUR 0	EUR 0	Closed & Inactive
> United States (USA)	USA_LOCAL_PR_2948 (Tempor...	01 Jan 2022	01 Jan 2023	---	EUR 122,400	EUR 0	EUR 122,400	Issued
> Argentina	4322345	01 Jan 2022	01 Jan 2023	---	EUR 102,000	EUR 0	EUR 102,000	Issued
> Brazil	asdf	01 Jan 2022	01 Jan 2023	---	EUR 2,080	EUR 0	EUR 2,080	Issued

FNOL

- 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

Client Portal > Saturday > GBR\_LOCAL\_PR\_241353

< Back

## GBR Property 1

GBR - INR  
Country - Exchange

Main Contact: **Mahesh Dommati**

**Property** Active & Complete 0 Days Until Expire

**Program ID:** PR216409.1 | **Policy Number:** 5632 | **Program Currency:** Local Currency | **Policy FX Rate** ▾

### Policy Details

Insured Name	Policy Type	Insurer	Broker	Total Limit
Global Insurer for Lonager Name to ...	Local Policy	DFDFDFD	Broke?r-5678	£ <b>45.68K</b>
	<b>Issued</b>	<b>Expiry</b>	<b>Effective</b>	
	07 Oct 2021	02 Oct 2022	02 Oct 2021	

### Premium Details and Instructions 3

Program Currency: Local Currency | Premium FX Rate ▾

Original Policy

Premium Details		Premium Instructions		
<b>Total Invoiced Amount</b>	<b>Premium</b>	<b>Payment Type</b>	<b>Premium Frequency</b>	<b>Invoiced to Customer</b>
£ <b>201.55M</b>	£ 61.2M	Local	Annually	Local Broker
	<b>Tax</b>	<b>Payment Due Date</b>	<b>Payment Due Time</b>	<b>Time Zone</b>
	£ 140.35M	04 Oct 2021	00:00	DFT(UTC+01)

### Local Limits

Program Currency: Local Currency | Policy FX Rate ▾

Issuing Country	Policy Type	Coverage Type	Local Coverage
United Kingdom of Great Britain a...	Local Policy	Business Interruption	£ 45.68K

4 FNOL Documents

- 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

The screenshot shows a web application interface for reporting a First Notice of Loss (FNOL). The interface is titled "First Notice of Loss (FNOL)" and includes a "Report a Loss" button, a filter section, and a table of FNOLs.

**1** First notice of loss section

**2** Apply filters to view your FNOL

**3** List of FNOL created

**4** Click on report a Loss

FNOL ID↑↓	Date of Loss↑↓	Estimated Loss Value↑↓	Status↑↓	Program Name↑↓	Policy Name↑↓	Last Updated↑↓	Updated By↑↓
48	25 Aug 2022	R\$ 76,990.00	Submitted		asdf	25 Aug 2022	Client Mercedes

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

The screenshot shows the 'Report a Loss' form in the 'Client Portal'. The breadcrumb is 'Client Portal > Report a Loss'. The page title is 'First Notice of Loss (FNOL)'. A navigation sidebar on the left shows four steps: 'Select a Program', 'Enter Details', 'Provide Loss Information', and 'Add Attachments'. The main content area is titled 'Select a Program / Policy' and includes a note: '\*Amounts are displayed in policy currency'. It features two dropdown menus: 'Program that covers this loss \*' with the selected value 'Property 2022 - Mercedes Property | 01 Jan 2022 | DEU | Active', and 'Policy that covers this loss \*' with the selected value 'USA\_LOCAL\_PR\_2948 Property | 01 Jan 2022 | USA | Issued'. Below the dropdowns, the text 'USA Property' is displayed. A red circle with the number '1' is placed above the breadcrumb, and a red circle with the number '2' is placed above the 'Select a Program' step in the sidebar.

- 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

The screenshot shows a confirmation dialog box titled 'Your Notice Of Loss Has Been Submitted!'. The dialog contains the text: 'Thank you! We will contact you with further details within one business day. Your temporary reference number is: 57. This is a temporary reference number and will be replaced by a claim number when your loss notice form has been processed.' At the bottom of the dialog, there are two buttons: 'Download this Notice of Loss' and 'Report another Loss'. A red circle with the number '4' is placed above the dialog title, and a red circle with the number '5' is placed above the 'Download this Notice of Loss' button.

# What information is shared with your insureds?

Client Portal > Insurance Portfolio

Mercedes 1

International Programs (2)

2

3

**Property 2022 - Mer...**  
Property(PR001114.1) **Active**

Producing Country: DEU  
Local Countries (10): BRA SWE CHE CAN +6

Global Insurer: -  
Coverage Type: Property Damage & Business Inter...  
Program period: 01-Jan-2022 - 01-Jan-2023  
Program Owner: GermanDemo User1

[Open Program](#)

**Property 2023 - Mer...**  
Property(PR001114.2) **Draft**

Producing Country: DEU  
Local Countries (10): BRA SWE CHE CAN +6

Global Insurer: -  
Coverage Type: Property Damage & Business Inter...  
Program period: 01-Jan-2023 - 01-Jan-2024  
Program Owner: GermanDemo User1

[Open Program](#)

FNOL

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 shared if their status is:

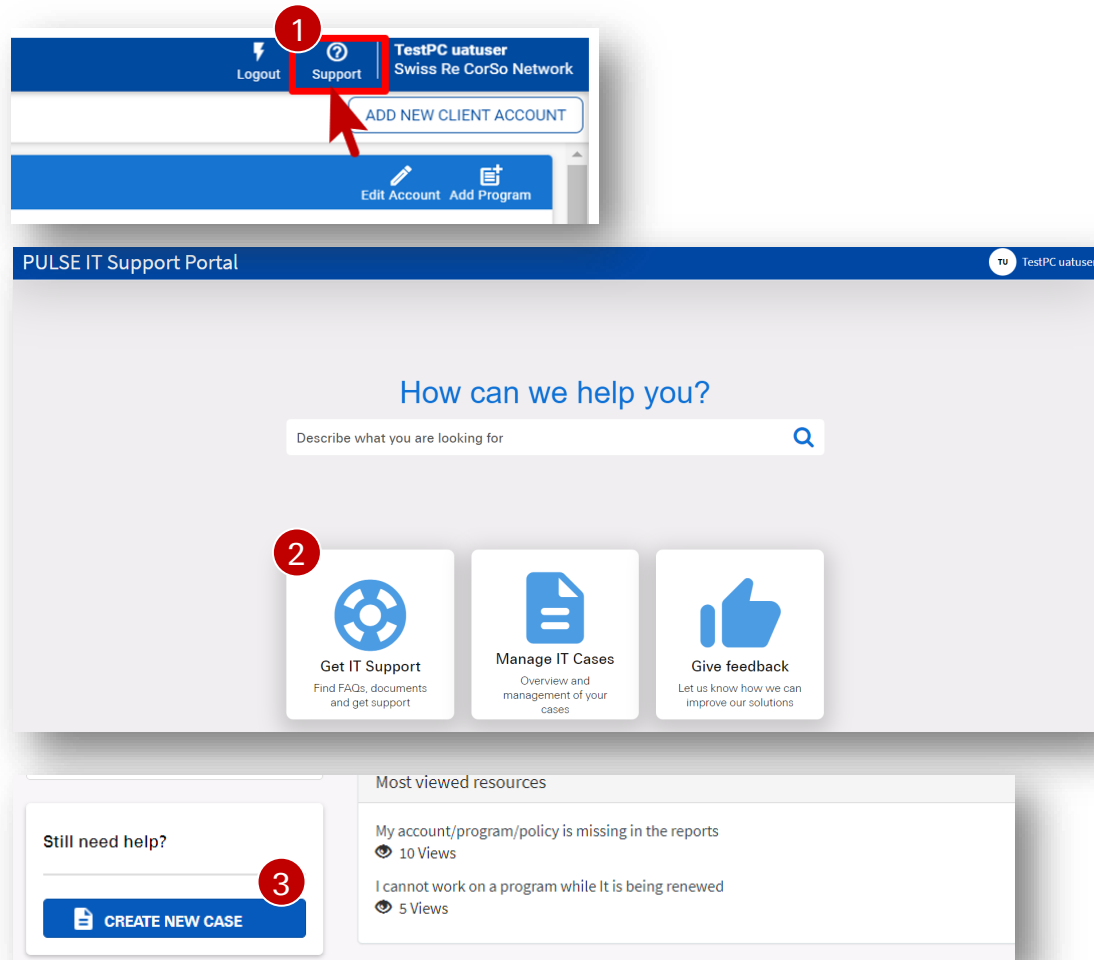
- Local policy review task is completed
- Policy status is set to "Issued"
- Policy status is set to "Expired"
- Policy status is set to "Active & Complete"
- Master policy is always shared

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 fixed 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"



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