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USER GUIDE

Broker Portal

This guide describes the current **C360 Broker Portal**: flat **sidebar** navigation, **section tabs** across the work area, an **action bar** under the tabs, and header **search** (overlay). **Client Communications** shows inbox and outbox in one list; **Settings** is a searchable hub for users, email, workbench teams, Smart Forms, AI keys, branding, and audit. A ? icon on section toolbars opens this guide at the matching topic (one reused browser tab). Use **Download PDF** for the pre-built file shipped with the docs; use **Print or save as PDF** for your browser's print dialog. For the end-to-end picture, start under [System workflow](#).

Set up your brokerage (administrator onboarding)

If you are the administrator for a brokerage that has just been added to the portal, this is your first-day checklist. Everything is configured from [Settings](#), and every setting you save applies only to your brokerage. Work through the steps in order — later steps depend on earlier ones. Tiles you do not have permission for are hidden by role, so start with **Users & access**.

Before you start (handled for you by the platform team): your brokerage and your admin login already exist, the Google/Microsoft OAuth client apps are registered, and any smart-tool entitlements (Smart Forms, Smart Tools) are switched on.

1. People & access [\(required\)](#)

1. Open **User Roles** and create roles that group permissions (for example Broker Admin, Claims, Sales).
2. Use **Permissions** to assign feature permissions to each role, and **Features** to toggle what is visible.
3. Open **Users**, add each team member, and assign their role.

2. Email & communications [\(required for the inbox\)](#)

1. Open **Portal Setup** and enter the Google / Microsoft OAuth Client IDs so staff can connect Gmail and Outlook.

2. In [Email configuration](#), add your mailbox(es), set the **default** send account, mark any **shared** team inboxes, add rules, then run **Sync Now**.
3. In **Intents**, define how incoming mail is classified (New Business, Claim, Service...) and run **Re-detect Intents**.

Tip

Do **Portal Setup** before adding Gmail/Outlook accounts — the OAuth connection needs those Client IDs. The default email account you choose here is also what workflow **Send Email** steps use.

3. AI & smart tools (required for Smart Forms / Smart Tools)

1. Open [AI configuration](#), enter your **Anthropic API key** and default model, save, then run **Test connection**.
2. Optionally set budgets, prefill/generation instruction defaults, and alert delivery.
3. When the key is working, set up [Smart Forms](#) and reusable Sample Instructions if you use them.

4. Workflows & automation (optional, recommended)

Configure [Task intents](#), build templates in the [Workflow Library](#), create reusable **Message Templates**, define context-sensitive [Actions](#), and set up **Document Types** with their mappings for pre-population.

5. Workbench, teams & appearance (optional)

Use **Teams** (workbench areas) to group work by function, and the **Appearance** tiles — **Tags**, **Partner Branding**, [Choose your Dot](#), and CSS variables — to brand and organise the portal.

6. Verify & go live

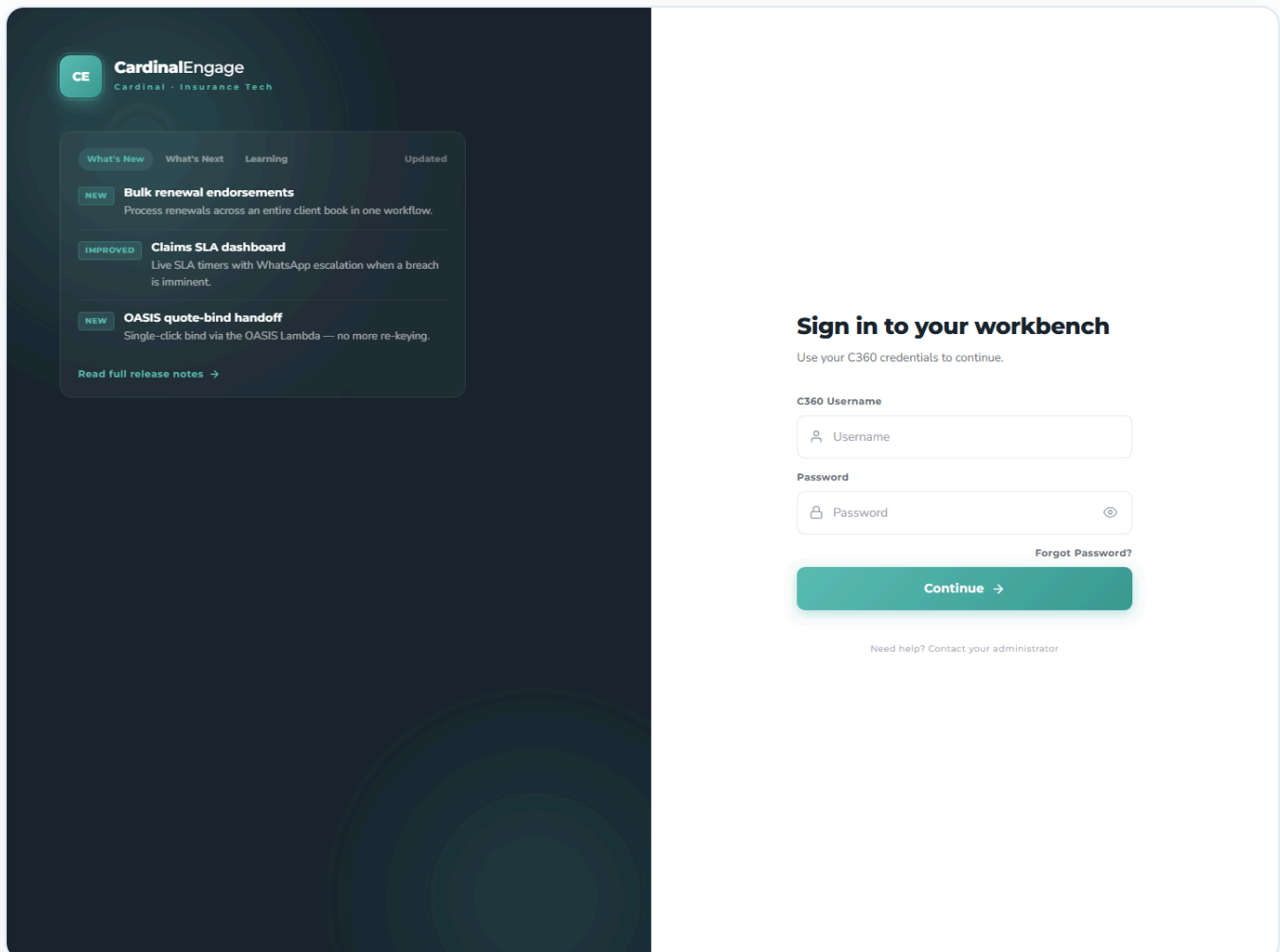
- A colleague can sign in and sees the modules their role allows.
- **Email Config** → **Sync Now** pulls mail and a message appears in [Communications](#) with a detected intent.
- **AI configuration** → **Test connection** succeeds.
- A [task](#) and a workflow step run, and email sends from your default account.
- **Audit Trail** shows the changes you just made.

Stuck?

If a setting tile is missing, your role doesn't include it yet — fix that under **Users & access** first. If AI or email features fail, re-check [AI configuration](#) and [Email configuration](#).

Sign in

Open your organisation's Broker Portal URL (often with a broker identifier in the address). Enter your **C360 Username** and **Password**, then choose **Continue**. If your account uses multi-factor authentication, complete the verification step on the next screen before the workbench loads.



CE

CardinalEngage

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What's New

What's Next

Learning

Updated

NEW

Bulk renewal endorsements

Process renewals across an entire client book in one workflow.

IMPROVED

Claims SLA dashboard

Live SLA timers with WhatsApp escalation when a breach is imminent.

NEW

OASIS quote-bind handoff

Single-click bind via the OASIS Lambda — no more re-keying.

[Read full release notes →](#)

Sign in to your workbench

Use your C360 credentials to continue.

C360 Username

 Username

Password

 Password

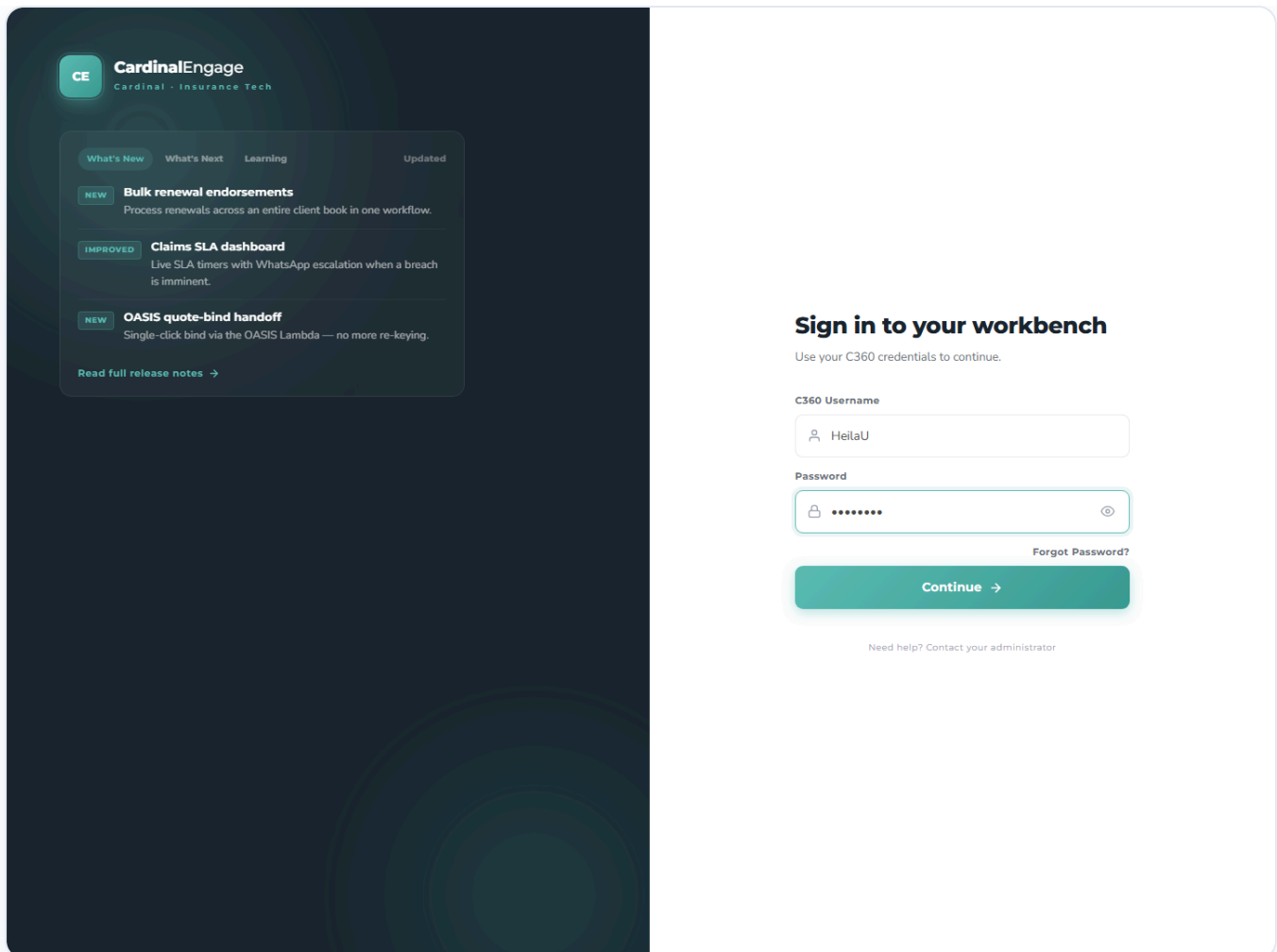


Forgot Password?

Continue →

Need help? Contact your administrator

Before you continue



1. Confirm you are on the correct broker sign-in page (logo and broker context).
2. Enter username and password; use **Forgot Password?** only when your administrator allows self-service reset.
3. Before you sign in, open the **Learning** tab (next to **What's New** and **What's Next**) to preview the first three getting-started training videos; more modules are in Learning Centre after sign-in.
4. After a successful sign-in you land on **My Workbench** (see [Home](#)).

How the Broker Portal fits together

The Broker Portal is a **broker workbench** on top of your C360 data: you work from a central home screen, open structured lists (claims, policies, renewals, leads, quotes), and use **Client Communications** and **tasks** to drive follow-up. Nothing happens in isolation—messages, tasks, and record screens are designed to reference the same client and the same pieces of work.

1

My Workbench

Home after sign-in — priorities, due work, pipeline snapshots, and shortcuts into the rest of the portal.

2

My Book

Claims, policies, renewals, leads, and quotes — set a date range (from 1 Jan 2025 to today) and **Search** on each grid to load your book.

3

Communications & tasks

Inbox, outbox, compose, and task-driven journeys — tied back to the same client and policy context.

4

Plan & measure

Calendar for time, business performance for outcomes, and settings for how you work in C360.

Operating rhythm

1. **Land on My Workbench** after sign-in to see what needs attention today (overdue work, due today, pipeline summaries, and shortcuts).
2. **Open a record area** when you are doing structured work—lodging or triaging a claim, checking a policy, working a renewal list, or moving a lead or quote forward.
3. **Use Client Communications** when the next step is conversational: reading what the client or market sent, replying, scheduling a send, or picking up a quote journey from an email thread.
4. **Use tasks** when something must be tracked to completion: assignment, status, due dates, and an activity trail keep everyone aligned.
5. **Close the loop** in **Calendar** or **Business performance reports** when you need to plan time or review outcomes.

Tip

Your **role** controls which sidebar items, buttons, and data you see. If a colleague has a screen you do not, ask your administrator rather than assuming the product is broken.

New business pipeline (lead → quote → placement)

New business usually moves from an early opportunity in **Leads** into structured quoting in **Quotes**, then—once accepted—into **Policies** and ongoing service. Exact steps depend on your brokerage's

products and insurer integrations; the portal gives you the grids, wizards, and actions your organisation has turned on.

- 1 Capture the opportunity** — Create or update a lead, capture contact and need, and assign ownership so follow-up is visible on the workbench or in lists.
- 2 Qualify and quote** — Move the opportunity through your internal stages (for example qualified → quote sent → proposal). Use quote tools and templates your organisation provides; multi-step wizards gather risk and client detail in a consistent order.
- 3 Compare and advise** — Where enabled, build or open comparisons so the client can see options side by side; record advice and next steps in line with your compliance process.
- 4 Place and hand over** — On acceptance, the record typically lives under **Policies** (and related documents or tasks). Renewals and mid-term service then continue from those same client and policy views.

See [Leads](#), [Quotes](#), and [Policies](#) in this guide for screen-level actions.

Renewals, claims, and ongoing service

After placement, most brokerages cycle between **policy maintenance**, **renewal campaigns**, and **claims**. The Broker Portal treats each as its own list and workflow surface so you can triage by urgency (renewal dates, claim status) without losing the link back to the client.

- 1 Renewals** — Use the renewals view to see what is coming due, prioritise outreach, and start or continue quote journeys when a renewal needs a market exercise.
- 2 Claims** — Register or open claims from the claims area; capture what happened, attach evidence where the product allows, and track the claim alongside related communications. While registering, use ← **Change ...** (for example ← **Change risk item** or ← **Change date of loss**) to go back one step if you picked the wrong option — you do not need to start over. Closing with **X** or **Cancel** abandons the registration.
- 3 Service tasks** — Non-claim changes (endorsements, documents, client queries) often appear as **tasks** or messages with intent-based suggested actions—complete the task or message thread so the audit trail stays complete.

See [Renewals](#), [Claims](#), and [Tasks](#) for practical steps.

Communications and tasks (how channels connect to work)

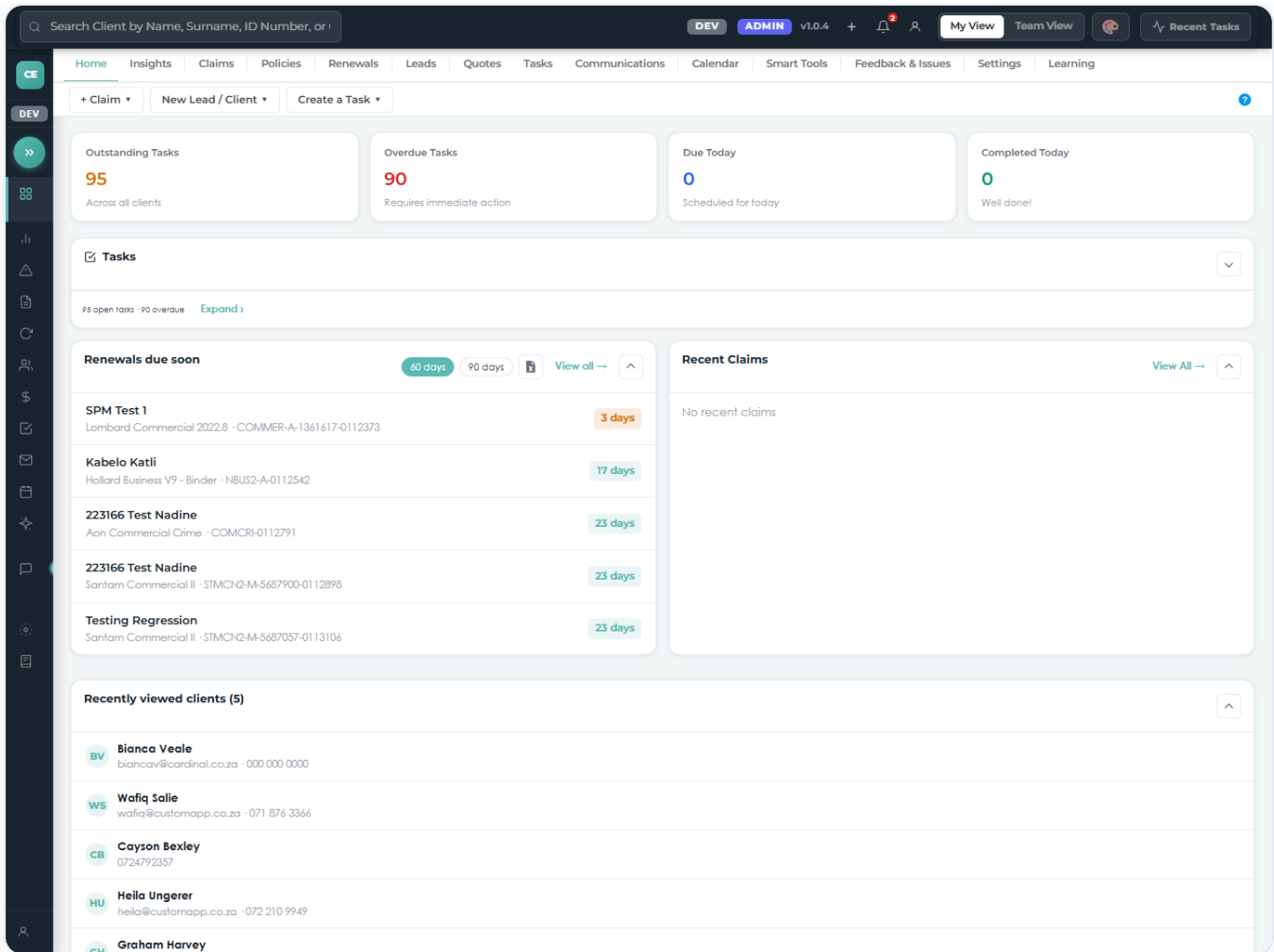
Client Communications brings inbound and outbound channels into one hub. Incoming items can be analysed for **intent** (for example quote request, claim notification, or document request). Actions you take on a message—replying, opening a linked workbench task, or continuing a quote journey—are meant to keep the **same piece of work** aligned across email, WhatsApp, SMS, and your task list where your organisation has wired those integrations.

- 1 Ingest** — New mail and messages land in the **Inbox**; filters, layouts, and intent groupings help you decide what to handle first.
- 2 Act** — Use intent-specific buttons when they appear (for example open a task, continue a quote journey, or open a comparison). That keeps the operational next step one click away from the conversation.
- 3 Record** — When a message should become accountable work, it should surface as or link to a **task** with status, assignee, and history—so nothing relies only on an inbox read state.
- 4 Respond & follow up** — Use **Compose** and the **Outbox** to send or schedule client-facing messages and to track delivery states where available.

See [Communications](#), [Outbox & delivery](#), [Compose](#), and [Tasks](#).

Home (My Workbench)

After sign-in, **My Workbench** is your home: dated header row, optional **area** picker when your profile spans more than one area, KPI-style summary cards (for example overdue and due today, pipeline value, forecast or opportunities, clients, and leads—labels match what you see on screen), embedded task panels, and the same navigation as the rest of the app. Use **Home** in the *section tabs* (top of the content area) to return here. Open **global search** from the header (see [Global client search](#)) — it slides in over the page. If you have both team and personal access, use **Team View** and **My Tasks** beside the title to switch between the team workload and only your own work.



What to do here

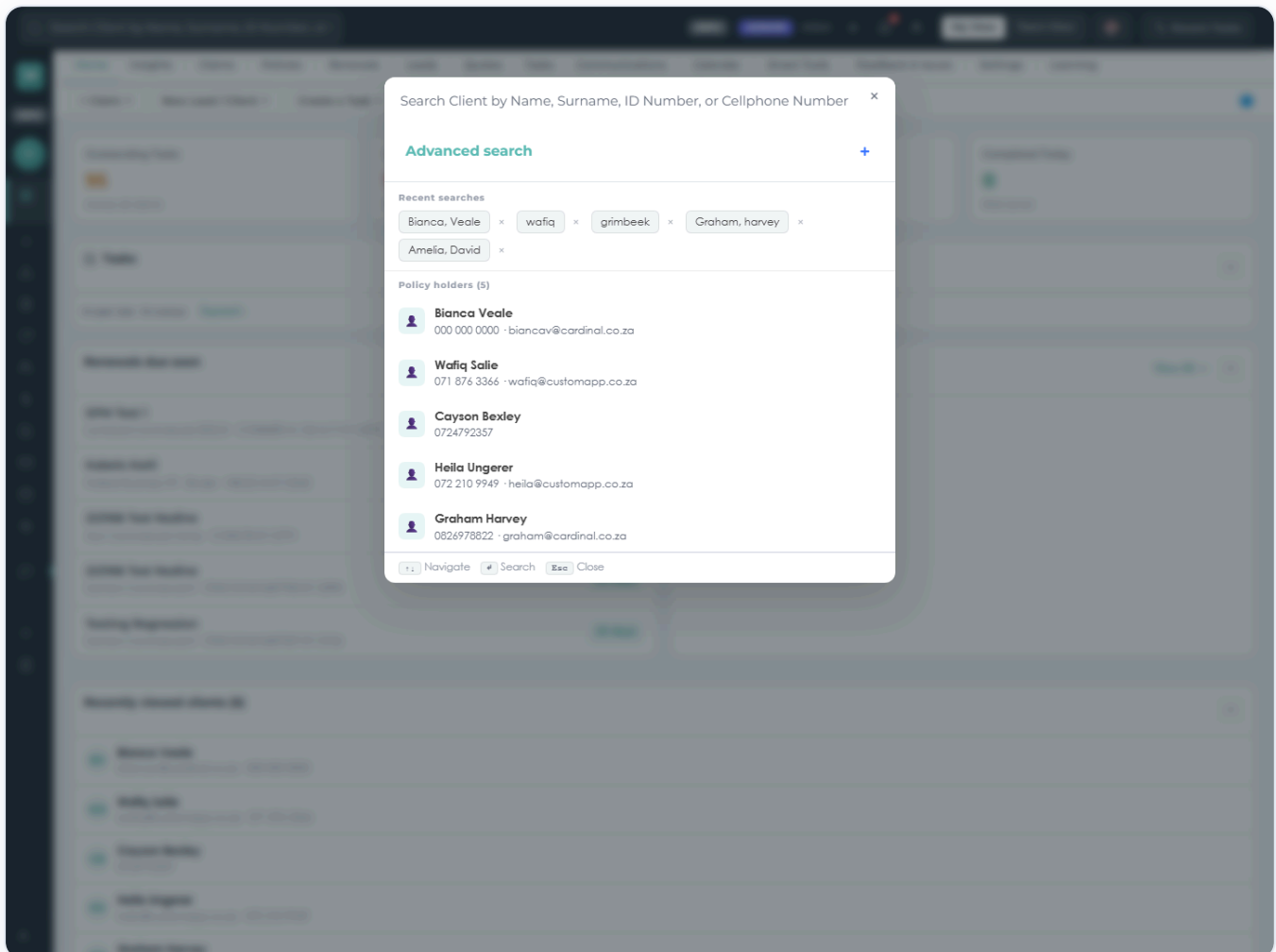
1. Open **search** from the header, type a client, then pick a result or open advanced options from the panel.
2. Choose a module from the **left sidebar** or the **section tabs** (Claims, Policies, Renewals, Leads, Quotes, Tasks, ...).
3. On My Workbench, use the top toolbar for **Quick Add, Communications** (opens **Client Communications** with inbox and outbox), **Documents**, the **notifications** bell, and **Refresh**. Use **New Task** when your role shows it.
4. Toggle **Dashboard** (grid icon) and **Calendar** (calendar icon) to see the same work as tiles and lists or on a time-based calendar.
5. In other sections, the **action bar** under the tabs offers shortcuts such as **+ Claim, New lead / quote, Email**, and **Tasks** — the buttons change per section.
6. Click the **?** (help) icon at the right end of the Home action bar to open this guide at **My Workbench** in a single help tab.

Permissions

Tabs and tiles only appear for features your role is allowed to use.

Global client search

From the C360 header, open the search control (magnifying glass on smaller screens, or the wide search field on large screens). A search overlay appears with a main field whose placeholder reads **Search Client by Name, Surname, ID Number, or Cellphone Number**. Type part of a name, a South African ID number, or a mobile number; matching policy holders appear below. Expand **Advanced search** to pick a specific **Search Type** (ID number, passport, cellphone, policy, claim, quote, member number, vehicle registration, OTP, and more) and enter its **Search Value** when you need a precise, single-criteria match.



Typical flow

1. Open search from the **header**.
2. Enter a single string or use **Advanced search**, then choose a result to open the client record (see [Client details page](#)).

3. Use **Close** (×) on the overlay when you are finished.

Client details page

After you pick a person from global search or another list, the **client details** area opens: one place to review the client, policies, tasks, documents, claims, communications, and related actions your organisation has enabled. On the **Documents** tab, use the row ... **Send** action to open the send-document screen; if the document cannot be loaded you see a toast instead of a silent no-op. Sending email from that screen needs [Email configuration](#) set up for your brokerage. Tabs and actions depend on client type (individual vs company) and your permissions. On the **Claims** tab, the grid lists insurer-acknowledged claims from C360 together with portal-registered FNOL rows. Claims you register through **Register a claim** appear immediately with status **Pending** (awaiting insurer/C360 registration); the claim number column also shows **Pending** until the insurer assigns a reference. Click a portal-registered row to resume the claim form. Once the insurer registers the claim upstream, it appears with a full claim number and insurer status. The grid also shows **Date Submitted** alongside **DOL** (date of loss). Use **Date submitted — From** and **To** with **Filter** to narrow claims by submission date, or use **Search claims** to filter the loaded rows. **Expand** opens the full claims list with the same columns and filters.

The screenshot displays the 'Client Details' page for Bianca Veale. The interface includes a top navigation bar with a search field and various tabs like Home, Insights, Claims, Policies, Renewals, Leads, Quotes, Tasks, Communications, Calendar, Smart Tools, Feedback & Issues, Settings, and Learning. The main content area is divided into several sections: 'Client Details' showing the name 'Bianca Veale' and birthday '25 July 1995 (31)'; 'Client Segmentation' with a progress bar; 'Client Tags' with a 'Select tag...' dropdown and 'Cancel'/'Save' buttons; 'Client Summary' with email 'biancav@cardinal.co.za' and phone '000 000 0000'; and 'Account Balance' showing 'R0,00'. A bottom navigation bar lists Policies, Proposals, Claims, Contacts, Tasks, Correspondence, Documents, Compliments & Complaints, and Activity Log.

Example: Bianca Veale

1. Open **global search** and search for **Bianca Veale** (first and surname together work well).
2. From the results list, choose the matching row (the **client name** cell) to open her client details.
3. Use the tabs and action buttons on that screen to continue work (for example policies, claims, or a new quote).

Tip

If several people share a surname, add a first name or use advanced search fields to narrow the list before opening a record.

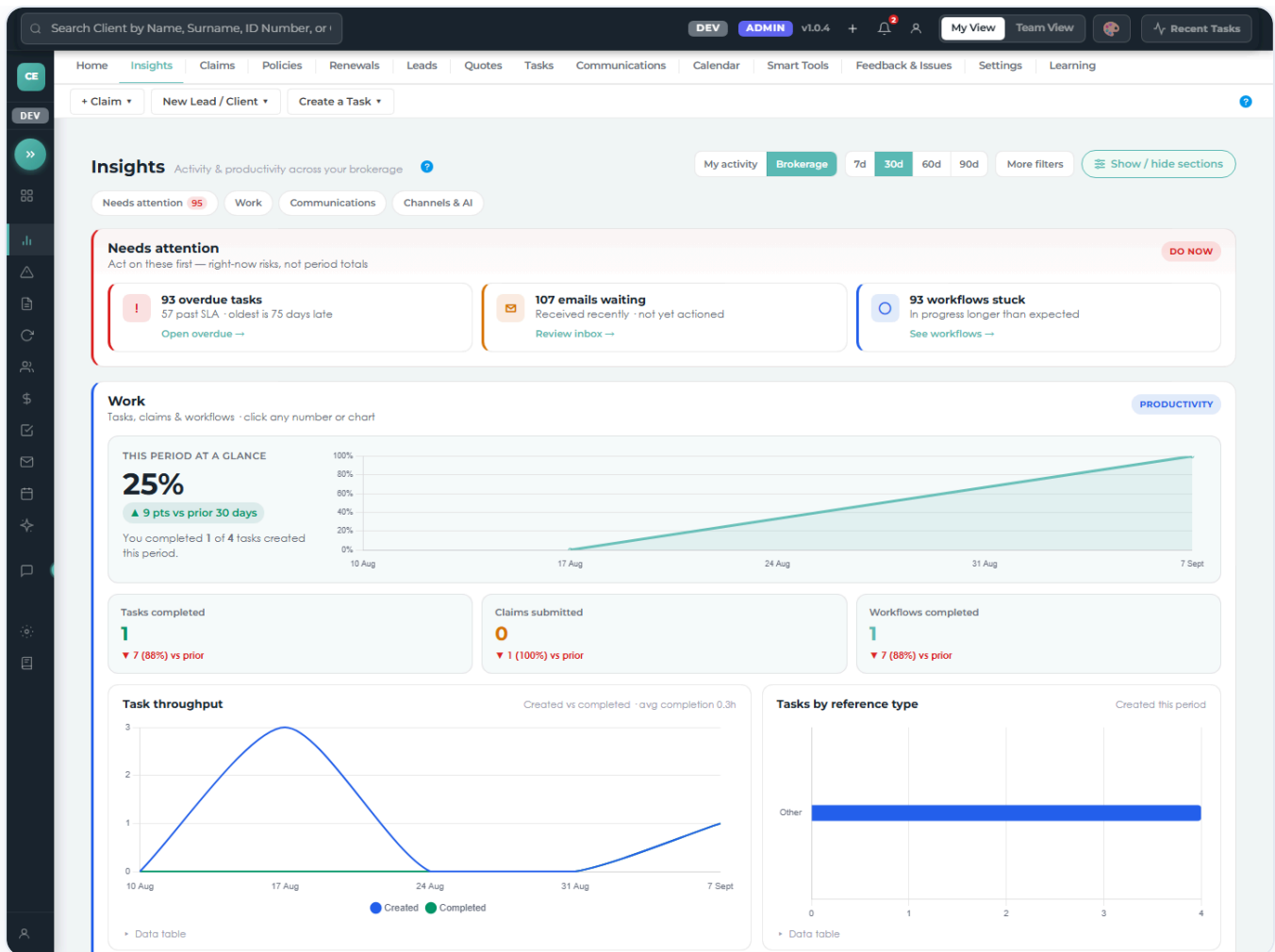
Clients

Use **Clients** in the sidebar (and the matching tab at the top of the content area) to jump straight to the same advanced search screen used by [Global client search](#). If you have not searched yet this session, the form opens blank — enter at least one search criterion (name, ID number, cellphone, and more under **Advanced search**) and choose **Search** to see results. Selecting a client from the results opens the [Client details page](#), exactly as it does from global search.

Insights

Open **Insights** from the left sidebar or the top **section tabs** (between **Home** and **Claims**). The page is organised into groups: **Needs attention** (overdue tasks, waiting emails, stuck workflows), **Work** (completion rate vs the prior period, task/claim/workflow KPIs and charts), **Communications** (email volumes and AI intents), and collapsible **Channels & AI** (WhatsApp, AI spend, roadmap). Use the date presets (7 / 30 / 90 days) and, if you have access, **My activity** / **Brokerage**. **Show / hide sections** lets you choose which groups appear; your choice is saved for your user. Use the filter bar to pick a date range (**7d** / **30d** / **90d** presets or a custom from–to), group the trend charts by **Day** / **Week** / **Month**, and **Refresh**. Every chart has a **Data table** toggle showing the underlying numbers. If your role has the team-stats permission you can switch between **My activity** and **Brokerage** (everyone in your brokerage); without it the page shows your own activity. Email **sent** / **received** volumes are always brokerage-wide—only **actioned** is attributed to you. Card captions and chip labels call out whether a figure reflects **this period** (the selected date range) or **right now** (the current moment, independent of the date range)—the two are not interchangeable. Use the section **?** help icon in the page header to open this guide.

Click to drill in. Attention tiles, summary KPIs, chart points/bars, and data-table rows are interactive—select one to slide open a **records drawer** listing the underlying items for exactly that number, respecting your current date range, scope, and the point you clicked. The drawer shows a live record count and pages through results 25 at a time. Where it makes sense, an **Open in Tasks** button hands off to the Tasks page with the matching filter already applied; the **AI Spend** drawer offers **Open in AI Configuration** (administrators only) to see full usage. Press **Esc** or the × to close the drawer.



Insights — WhatsApp & Roadmap panels

The Insights page also reports on your **WhatsApp** channels and on **roadmap interest**. The KPI strip includes **WhatsApp Received** (messages received in the selected period, with sent this period and unread right now in the caption) and **Roadmap Watches** (how many people are watching roadmap items, with your brokerage's share in the caption). Click either card to open the records drawer.

WhatsApp Self-Service shows client messaging through your WhatsApp channel: received vs sent trend, unique clients, attachments received, average first-reply time, and your most active conversations. Drill into any figure to list the underlying messages, and use **Open in Self-Service Chat** from a conversation drill to jump straight to that client's thread. In **My activity** scope only your own *sent* messages are attributed to you — incoming messages and reply times are always brokerage-wide (a note on the card reminds you).

WhatsApp AI Agent summarises broker conversations with the BrokerLens agent over WhatsApp: sessions, messages exchanged, tool actions run, and registered channels. **Roadmap Engagement** shows which upcoming features your brokerage is liking on the public **Product Roadmap** page — each

tap of the heart adds a like (tap the minus to remove one of yours), so the counts are real. The panel shows only your brokerage's own watches, attributed via your sign-in link.

WhatsApp Self-Service Transactions is different from the messaging panel above — it reports what clients actually *completed* through your WhatsApp self-service bot menu: registrations, claims lodged (broken down by claim type — motor accident, geyser, glass damage, and so on), policy document / confirmation-of-cover requests, panic requests, and opt-outs. This data comes from your WhatsApp self-service provider, so it only appears once your brokerage has a self-service bot configured; brokerages without one see a note instead of the panel. Click any chip or the claim-type chart to see the underlying records, and click a bar in the claim-type breakdown to see just that claim type.

Portal Assistant (Dot)

The **Portal Assistant** is an in-app help chatbot with **Dot** as its face. When your brokerage has enabled it in **Settings** → **AI Configuration**, a Dot button appears at the bottom-right of every screen by default. You can **drag** it to another spot (saved in this browser). Listing pagination stays clear of the default position. Click the Dot to ask how-to questions about the portal.

- Answers are grounded in this user guide — look for citation chips that open the matching section.
- When a how-to maps to a screen in the portal, Dot also shows **Open** / **Register** buttons (for example **Open Claims** and **Register a claim**) so you can go there without leaving the chat answer.
- Keep chatting freely after any answer — follow-up questions stay in the same thread. Use **Report** next to the message box (or the **Report an issue** chip) to open a short form and log a defect, enhancement, or other feedback. You can attach up to 5 files (images, PDF, or video — 10 MB for images/PDF, 50 MB for video) to show what you mean. Dot creates a [Feedback & Issues](#) item with those attachments (and syncs it to ClickUp when configured). Reporting does not stop the chat.
- Use the **microphone** button next to Send to dictate your question (allow microphone access when the browser asks). Tap the mic again to stop; review the text, then Send. Typing still works as before.
- Use the **S / M / L / XL** controls in the assistant header to set the panel width; your choice is remembered on this browser.
- If Dot cannot answer, use **Ask an admin** to escalate; the reply appears in the same chat thread.
- Admins manage the queue from **Settings** → **Assistant Admin**.

- The decorative idle Dot (Appearance → [Choose your Dot](#)) is separate from this launcher, but both use the same nature look you pick.

Tasks

Open **Tasks** from the left sidebar or the top **section tabs**. The page shows four summary cards—**Outstanding Tasks**, **Overdue Tasks**, **Due Today**, and **Completed Today**—then a task list inside a card. Use the search field, **Sort**, and **Columns** in the strip above the list to narrow, reorder, or customise which columns you see; select any row to open the task detail window (see [Task detail modal](#)). Use the section ? help icon (when present) to open this guide in a single browser tab.

The screenshot displays the 'Tasks' page in a software application. The top navigation bar includes tabs for Home, Insights, Claims, Policies, Renewals, Leads, Quotes, Tasks, Communications, Calendar, Smart Tools, Feedback & Issues, Settings, and Learning. Below the navigation bar, there are four summary cards: Outstanding Tasks (95), Overdue Tasks (90), Due Today (0), and Completed Today (0). Below these cards is a task list table with columns: Task, Client, Intent, Workflow type, Priority, Status, Due, Created, Assignee, and Actions. The table contains several rows of tasks, including 'Add New Client' and 'Quote Request' tasks.

Task	Client	Intent	Workflow type	Priority	Status	Due	Created	Assignee	Actions
Add New Client Task ref 41927a9d	—	Add New Client	Add New Client	High	Open	—	18 Aug 2026 - 04:50	HeilaU	...
Add New Client Task ref f84a4e7b	—	Add New Client	Add New Client	High	Open	—	18 Aug 2026 - 04:49	HeilaU	...
Add New Client Task ref ad8b8e50	—	Add New Client	Add New Client	High	Open	—	18 Aug 2026 - 04:41	HeilaU	...
WCQ-037 post-merge live verification - Claude Task ref c3721fd1	—	Quote Request	Quote Request V2	Medium	Open	01 Aug 2026 (38d)	29 Jul 2026 - 12:53	Heila Ungerer	...
Quote Request v2 - Wafiq Task ref 1a30d1e6	Bianca Veale	Quote Request	Quote Request V2	Medium	In Progress	01 Aug 2026 (38d)	29 Jul 2026 - 07:51	Heila Ungerer	...
Follow up — Re: Quote request - comprehensive motor cover for my 2021 VW Polo Task ref 24be7091	Bianca Veale	Quote Request	Quote Request V2	Medium	Open	01 Aug 2026 (38d)	29 Jul 2026 - 07:51	Heila Ungerer	...
WCQ-037 fix verification - Claude Task ref 1429baf7	—	Quote Request	Quote Request V2	Medium	Open	01 Aug 2026 (38d)	29 Jul 2026 - 07:37	Heila Ungerer	...
Quote Request Task ref 73ae73f3	Bianca Veale	Quote Request	Quote Request V2	Medium	Open	01 Aug 2026 (38d)	29 Jul 2026 - 07:03	Heila Ungerer	...

What to do on this page

1. Open **Tasks** from the sidebar or the top section tabs.
2. Read the summary cards for counts that need attention (overdue and due today are highlighted in the list title row too).

3. Type in **Search title, client, intent, status...**, use **Sort** to reverse the active column order, or **Columns** to show, hide, and reorder table fields (see [Task filters](#)).

Tip

Counts and list contents depend on your permissions and whether your organisation uses shared team views—only options you are allowed to see will appear.

Creating a task

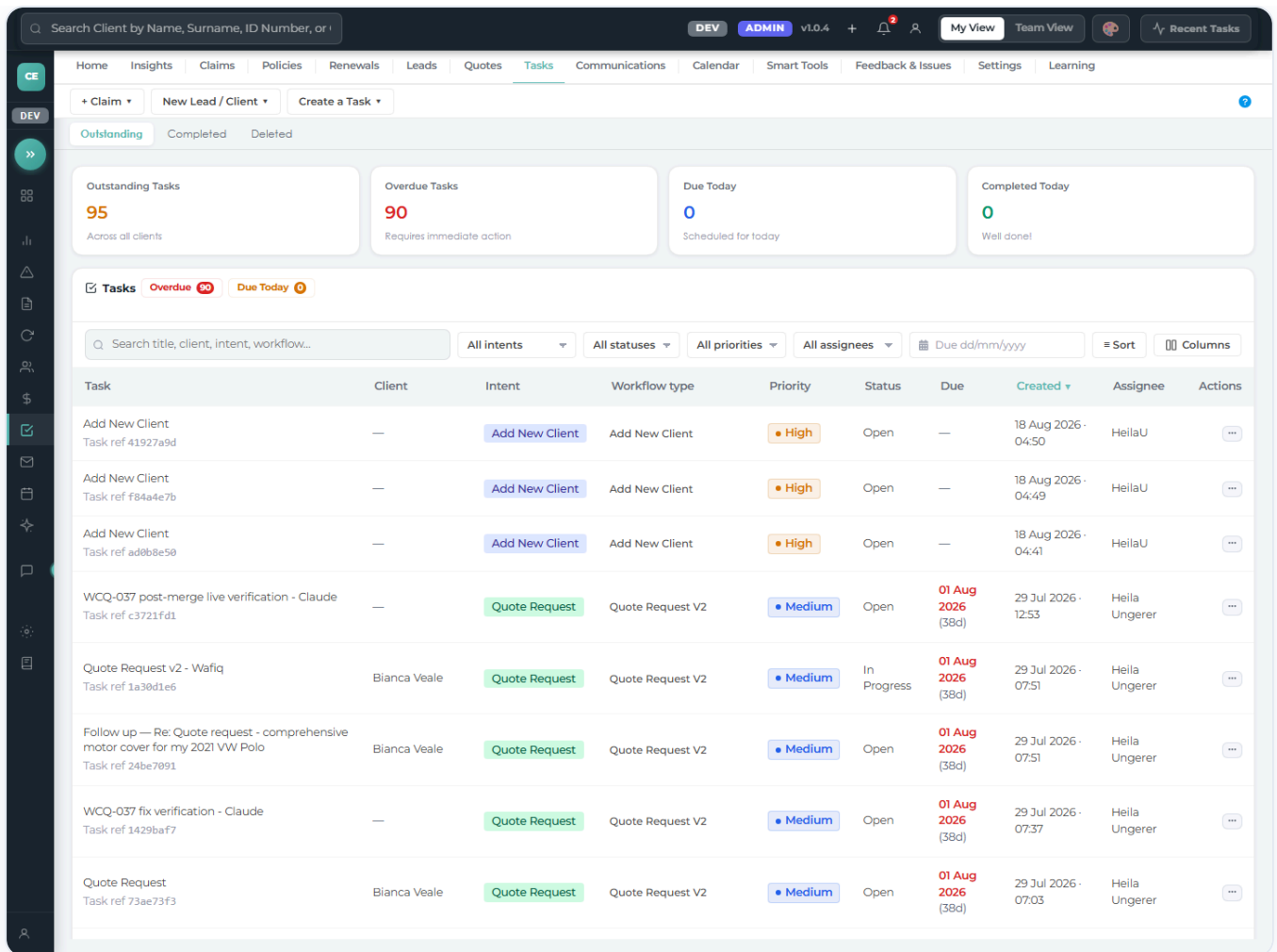
Use **New Task** (My Workbench toolbar), **Quick Add**, or **Create Task** from Communications and a client profile to open the create-task window. Enter a clear **task title**, choose the **task type** (this controls routing, priority, follow-up timing, and the actions available), optionally link a **client** and a **communication**, and confirm the **due date**. Use **Advanced details** for assignee, status tag, priority, follow-up time, reference, and description.

Workflow-driven tasks

If your organisation runs the workflow engine, a task can also run a step-by-step **workflow**. Where your administrator turns on the workflow-first option, the create-task window leads with the **Workflow** field and fills in the matching team and task type for you automatically—if a workflow maps to more than one task type, you simply pick which one to use. Brokers without this option keep the standard task-type-first window.

Task filters

Narrow the task list using the search field and the buttons on the same row. The placeholder **Search title, client, intent, status...** describes what is matched across tasks you are allowed to see. Use **≡ Sort** to reverse the sort direction for the column currently in use. Use **Columns** to open **Customise table**—drag rows to change column order, tick or untick fields to show or hide them (**Task** always stays visible), choose **Comfortable** or **Compact** layout density, and use **Restore defaults** to reset your layout. Your choices are saved for your user on this device.



Using search and sort

1. Click in the search field and type part of a title, client name, intent, or status.
2. Choose **Sort** to flip the sort direction for the active column when you need oldest-first or reverse order.
3. Choose **Columns** to customise which fields appear in the table, drag rows to reorder them, and pick comfortable or compact density. Click **Save** to apply or **Restore defaults** to reset.
4. Clear the search field to show the full list again.

Task detail modal

Opening a task opens a large modal. On wide screens, a **left sidebar** shows **Client** (click to open the client profile when a client is linked), **Linked email** or **Linked WhatsApp** when the task references a message, **Status tag** with **Quick actions**, and an **Activity log** at the bottom (expand or collapse; the app remembers your last expanded or collapsed choice on this device). The main panel shows task details and, when you have access, optional manager fields in a grid layout. If the task is a **subtask**, a

Parent task link appears under the title (in the task detail modal and in the workflow viewer) — select it to open the parent. In the Tasks list, subtasks also show a **Subtask** badge that opens the parent. Managers see **Save changes** when edits apply; everyone can update the status tag or use **Close** when finished reading. When a workflow step is a proposal or smart form, look for the **Required fields only** switch above the form — turn it on to hide every optional question and see just what still needs to be completed, then turn it off again to see the whole form. The same switch is available on a form's secure **Send to client** link.

Screenshot: tasks-detail-modal

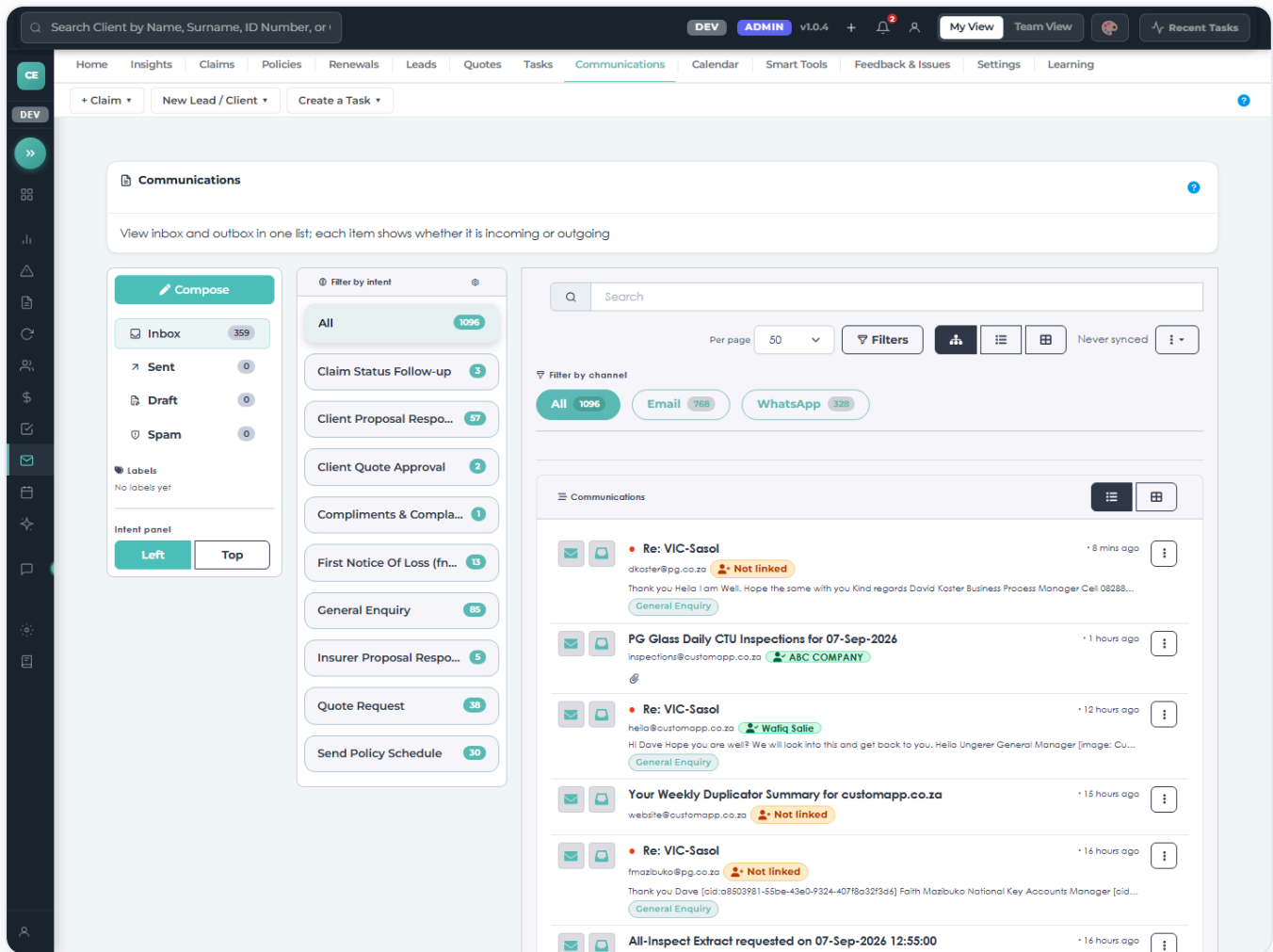
Run `npm run screenshots:capture`, then `npm run screenshots:embed`

1. Select a task in the list.
2. Read the header for **Task ID** (short reference), title, and timing badges.
3. Use the **left sidebar** for client, linked communication, status tag, **Available actions** (built-in next steps such as journey or communications shortcuts), and the **Activity log**.
4. Expand or collapse the **Activity log** as needed; scroll inside the list to see older entries.
5. If you can edit, update fields in the grid and choose **Save changes**; otherwise use **Close** when you are done.

Communications

Client Communications combines inbound and outbound messages. Open it from the sidebar, the section tabs, or the **Communications** button on **My Workbench** (same hub in a large window). Use the **Inbox** and **Outbox** tabs, **Compose** for new messages, channel filters, AI-detected intent hints,

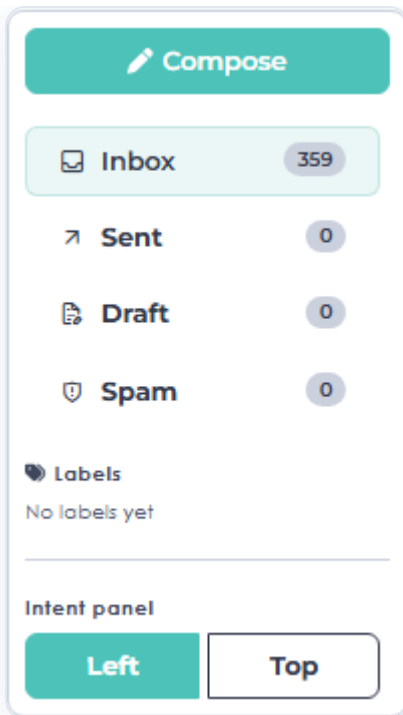
search, layouts (tree / compact / cards), and optional **My inbox** vs **Team inbox** when shared mailboxes exist.



1. Open **Communications** from the sidebar, section tabs, or the My Workbench toolbar.
2. Switch between the **Inbox** and **Outbox** tabs; tab badges show counts. Choose **Compose** in the header to start a new message.
3. In **Inbox**, use **All**, **Email**, **WhatsApp**, and **Calls** to filter by channel; turn on **Show actioned** when you need to include items already handled.
4. Use the toolbar for search, page size, filters, and layout; open the **More** menu for sync, intent tools, and extra layout options where available.

Folder rail (Inbox / Sent / Draft)

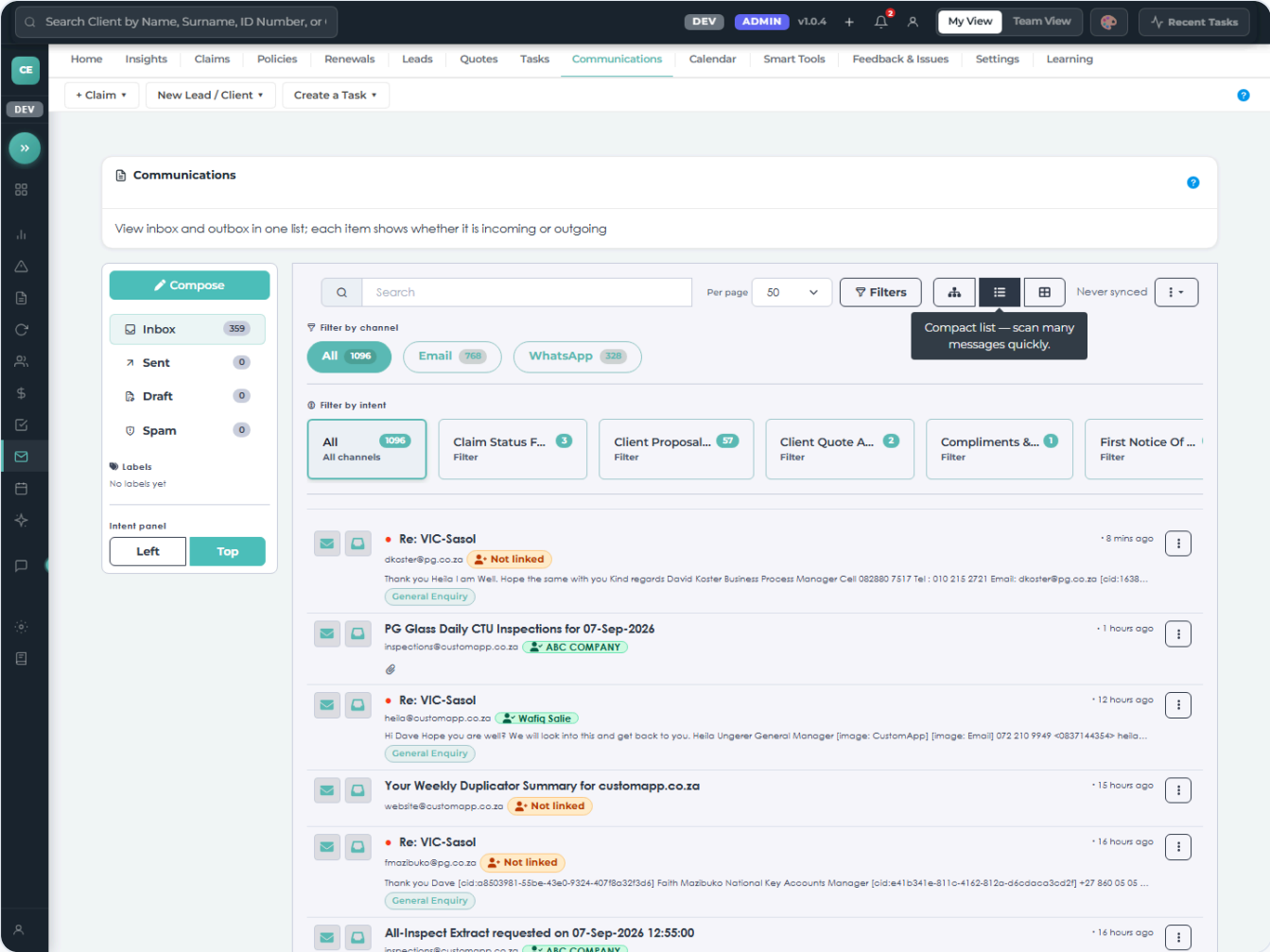
A mailbox-style folder rail sits alongside the message list with **Inbox**, **Sent**, and **Draft**, each showing a live count, plus a **Compose** button at the top. Counts come from the messages already loaded for the current view. **Spam** and **Trash** are not part of this rail yet.

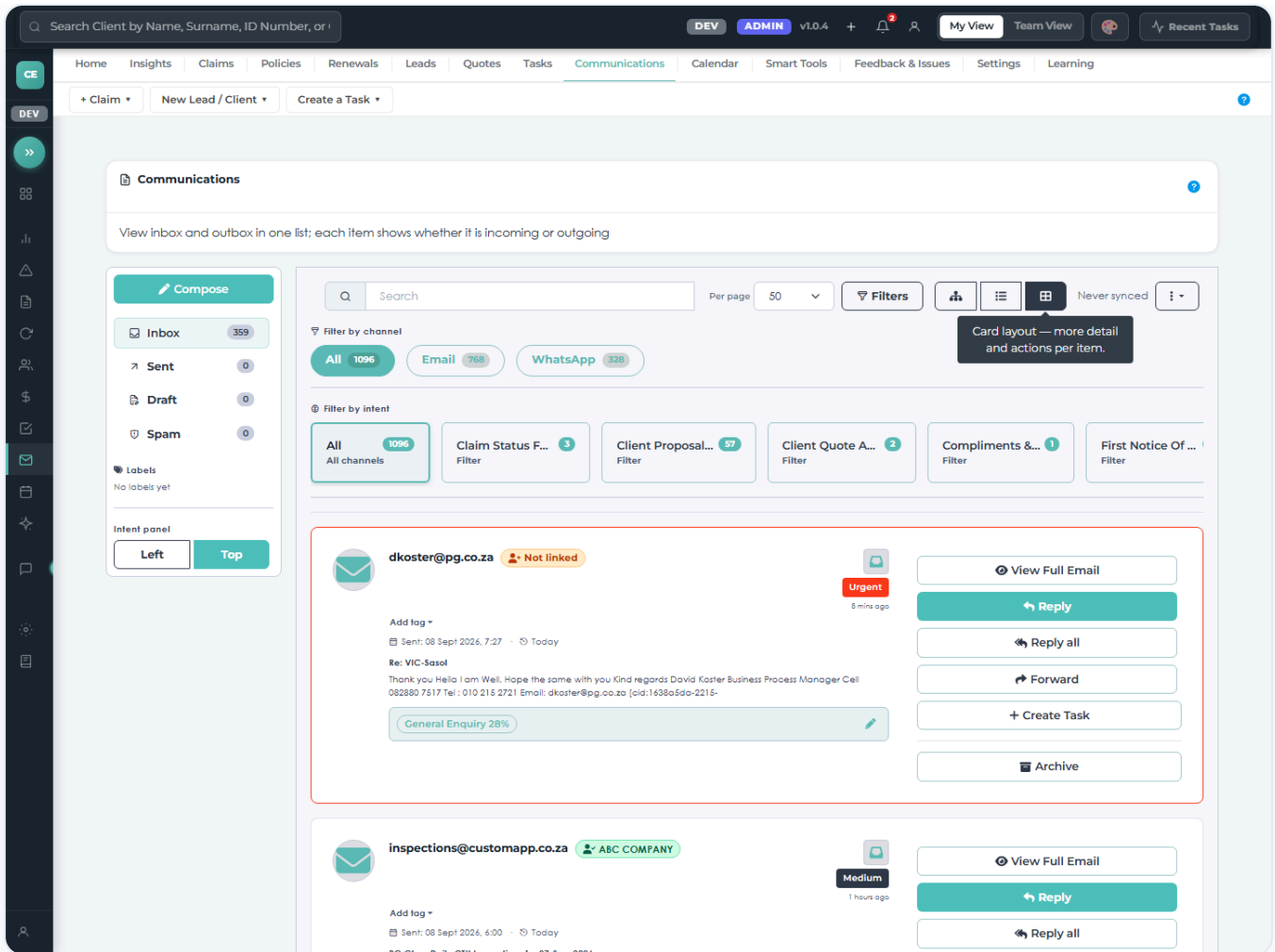


1. Use **Inbox**, **Sent**, and **Draft** in the folder rail to jump between those views; each shows a live count badge.
 2. Choose **Compose** at the top of the rail to start a new message.
-

Different layouts

Switch how the inbox list is presented: **Tree** (intent sidebar + list), **Compact** (dense rows), or **Cards** (more detail per message).

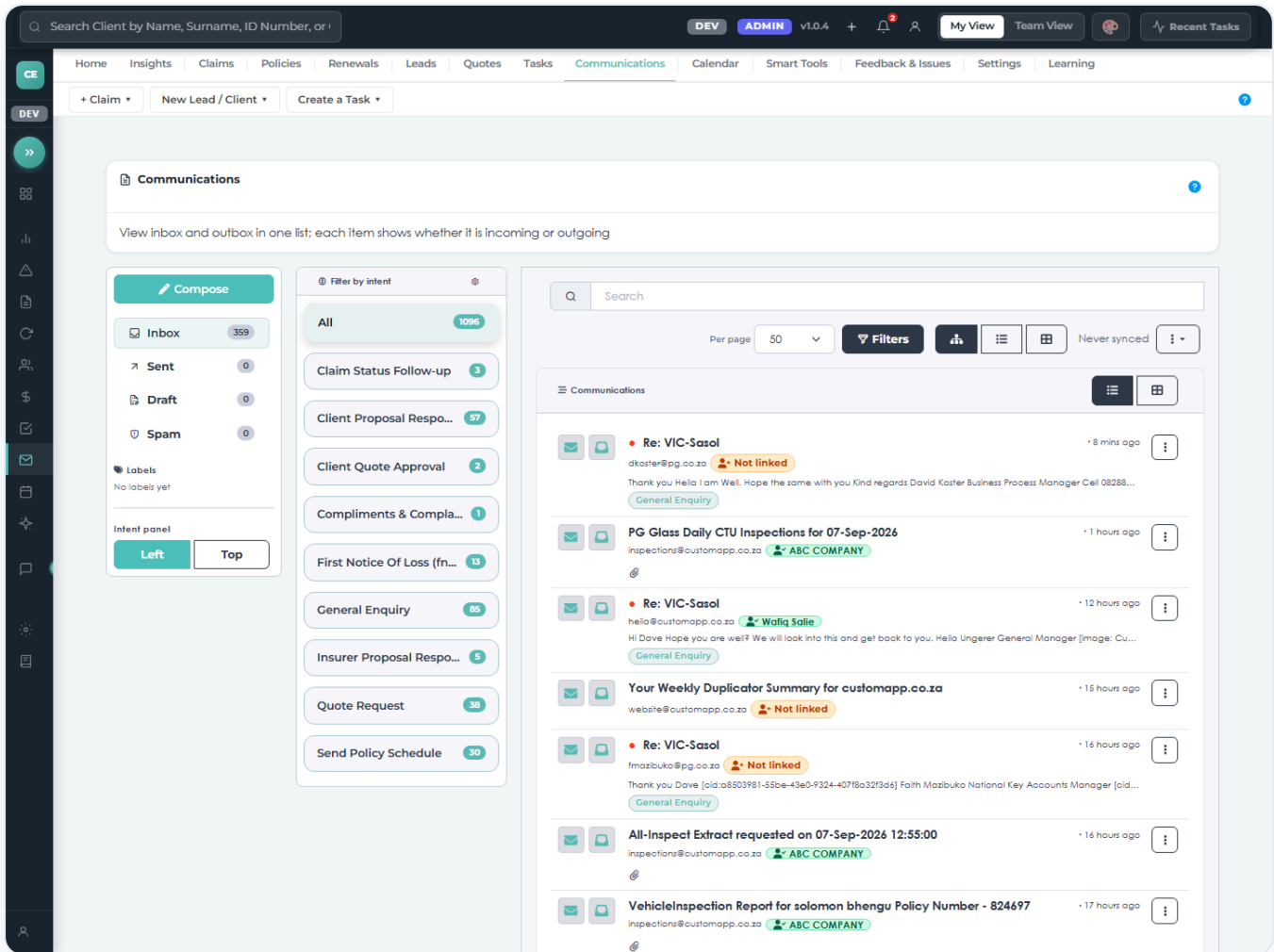




1. Find the layout buttons (Tree / Compact / Cards) in the communications toolbar.
2. Click a layout to switch; wait briefly for the list to redraw.
3. In **Cards**, use the layout menu to place action buttons on the right or bottom of each card.

Filters

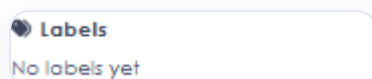
Expand the filters strip to refine the inbox by channel, tags, and other criteria.



1. Click **Filters** to expand or collapse the filter panel.
2. Adjust the options that appear (channels, tags, and so on).
3. Collapse filters when you want more room for the message list.

Labels

Labels in the folder rail are the same brokerage **Communications**-category tags used in the filter strip and on message cards — there is no separate labelling system. Selecting a label in the rail filters the list to messages carrying that tag.

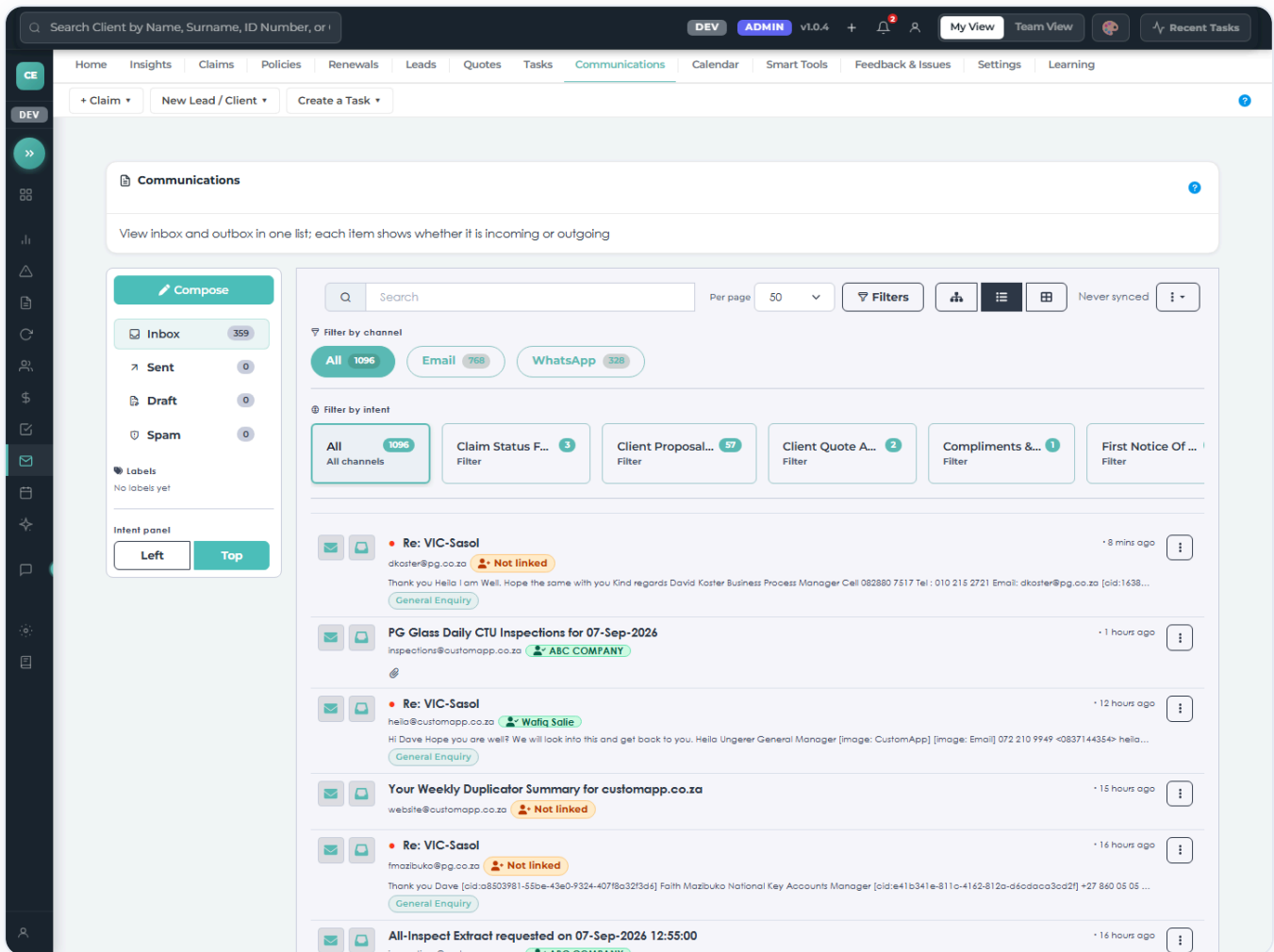


1. Find **Labels** in the folder rail, listing your brokerage's Communications-category tags.
2. Click a label to filter the list to messages with that tag; click it again (or **Clear** in the filter strip) to show all.

3. Manage the underlying tags in **Settings** → **Manage Tags**.

Filter by intent

AI-assigned intents group messages by purpose (for example claims, renewals, quotes). In **Tree** layout you get a left **Filter by intent** panel; in other layouts intent appears as tiles in the filter strip. Intent filters and related inbox controls use the same primary accent colour as the rest of the Broker Portal chrome so the strip stays easy to scan.

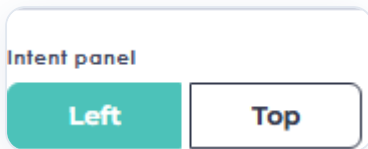


1. In **Tree** layout, pick an intent in the left panel to filter the list.
2. Elsewhere, use the **Filter by intent** cards in the expanded filters area.
3. Intent badge counts follow the same **channel** and **tag** filters as the message list, so totals match what you can see.
4. Use **Clear** beside the intent header when you want to show all messages again.

5. Optional: **Customise** which intents appear in the sidebar (gear control), if shown.

Intent panel position (Left/Top)

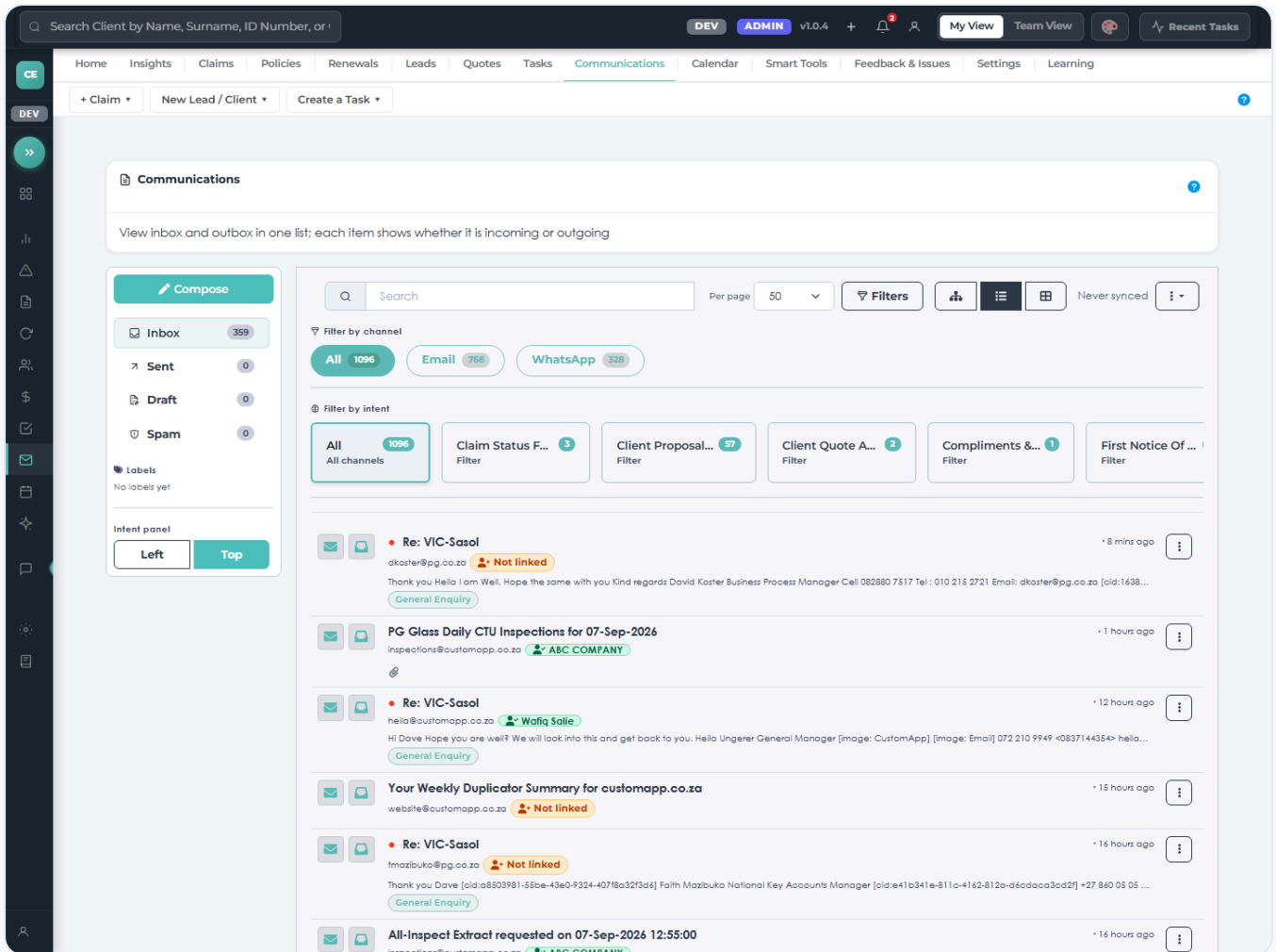
Choose whether the **Filter by intent** panel sits to the **Left** of the message list (the Tree layout) or across the **Top** as intent tiles. The choice is saved to your user profile and applied the next time you open Communications, on any device.



1. Find the **Left / Top** toggle in the folder rail.
 2. Choose **Left** for the Tree layout with intents down the side, or **Top** for intent tiles above the list.
 3. If saving fails (for example the feature is not yet enabled on your environment), a message appears near the toggle; your choice still applies for this visit.
-

Inbox channels

Limit the **Inbox** to every channel, email only, WhatsApp only, or phone **Calls** when that filter row is visible (badge counts often appear on each option).



1. In the inbox toolbar row, find **All**, **Email**, **WhatsApp**, and **Calls** where your build shows them (counts may show on each).
2. Click the channel you need; the list updates to match.
3. Use **Clear channel filter** when you want all channels again.

View WhatsApp

Open a WhatsApp thread to read the conversation and use WhatsApp-specific actions.

Screenshot: communications-view-whatsapp

Run `npm run screenshots:capture`, then `npm run screenshots:embed`

1. Filter to **WhatsApp** or locate a WhatsApp row in the combined list.
 2. Select the message to open the detail / reader view.
 3. Use the actions shown for that channel (reply, mark read, and so on).
-

View email

Open an email to read the full thread and use email actions (reply, forward, linked workflows).

Screenshot: communications-view-email

Run `npm run screenshots:capture`, then `npm run screenshots:embed`

1. Filter to **Email** or pick an email row in the list.
 2. Select the row to open the email detail view.
 3. Use **Compose** or inline actions as needed.
-

Not linked to a client

A message whose sender could not be automatically matched to a C360 client shows a **Not linked to a client** badge on the row. Use it to search for and link the correct client without leaving Communications.

Screenshot: communications-not-linked-badge

Run `npm run screenshots:capture`, then `npm run screenshots:embed`

1. Look for the **Not linked to a client** badge on an unmatched message row.
 2. Select the badge to open the client search.
 3. Search by name, ID number, or cell number, choose the matching client, and confirm to link.
-

Intent actions

On a message card or detail view, action buttons reflect the detected intent (for example "Send comparison", "Open task", or template replies). For **Client quote approval**, use **Open quote approval task** and **Email policy to client**; binding to C360 is recorded automatically when you run the policy-email step (there is no separate **Submit selection to C360** button in Communications).

Screenshot: communications-intent-actions

Run `npm run screenshots:capture`, then `npm run screenshots:embed`

1. Open a message so intent-specific actions are visible.
 2. Choose the action that matches what you want to do next.
 3. If an action opens another screen or modal, complete the steps shown there.
-

Link to workbench task

Some messages are tied to a workbench task. Use the link or action that jumps you from the message to the related task so you can finish the workflow in **Tasks** or the workbench.

Screenshot: communications-workbench-task

Run npm run screenshots:capture, then npm run screenshots:embed

1. Open the message that references a task.
2. Choose **Open task**, **View task**, or similar wording shown on the card.
3. Complete the task steps, then return to Communications if you need to follow up by message.

Continue quote journey

When a communication is part of an active quote journey, you can resume the journey (for example after an insurer reply). If the email is linked to a task but no in-progress journey exists yet, the prompt offers **Create new task**, **Start quote**, or **Cancel**. If no task is linked yet, choose **Create new task** to open My Workbench's task creation flow.

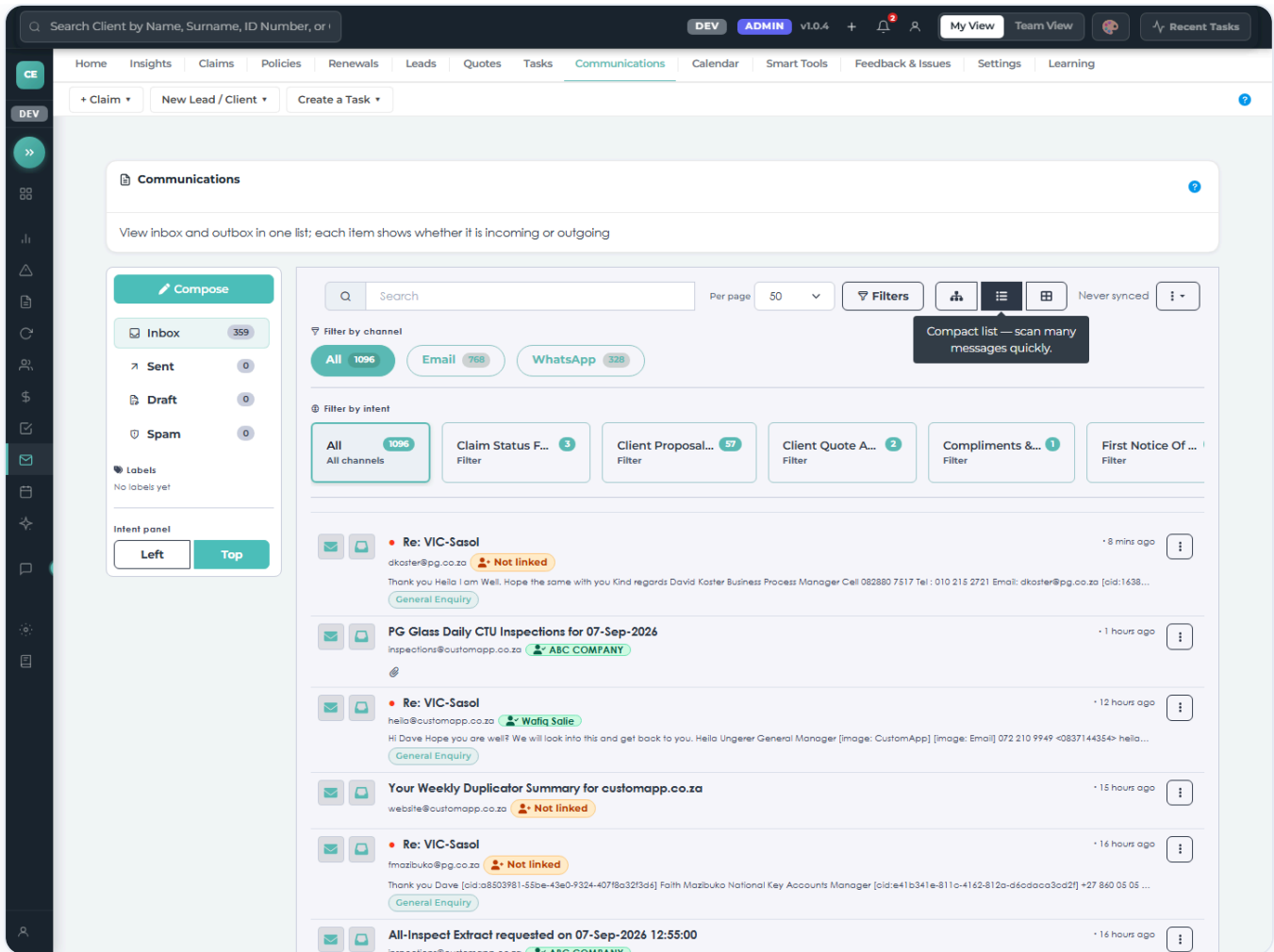
Screenshot: communications-continue-quote

Run `npm run screenshots:capture`, then `npm run screenshots:embed`

1. Open the relevant email or threaded conversation.
 2. Look for **Continue quote journey** (or equivalent) in the context banner or actions.
 3. If no saved journey exists on a linked task, choose **Create new task**, **Start quote**, or **Cancel**.
 4. If no workbench task is linked to the email, choose **Create new task** to open My Workbench and create one, or **Cancel**.
 5. For **Client quote approval**, continue routes you to **Quote comparison** when a task is linked.
 6. Follow the prompts to pick up where the journey left off.
-

Outbox & delivery status

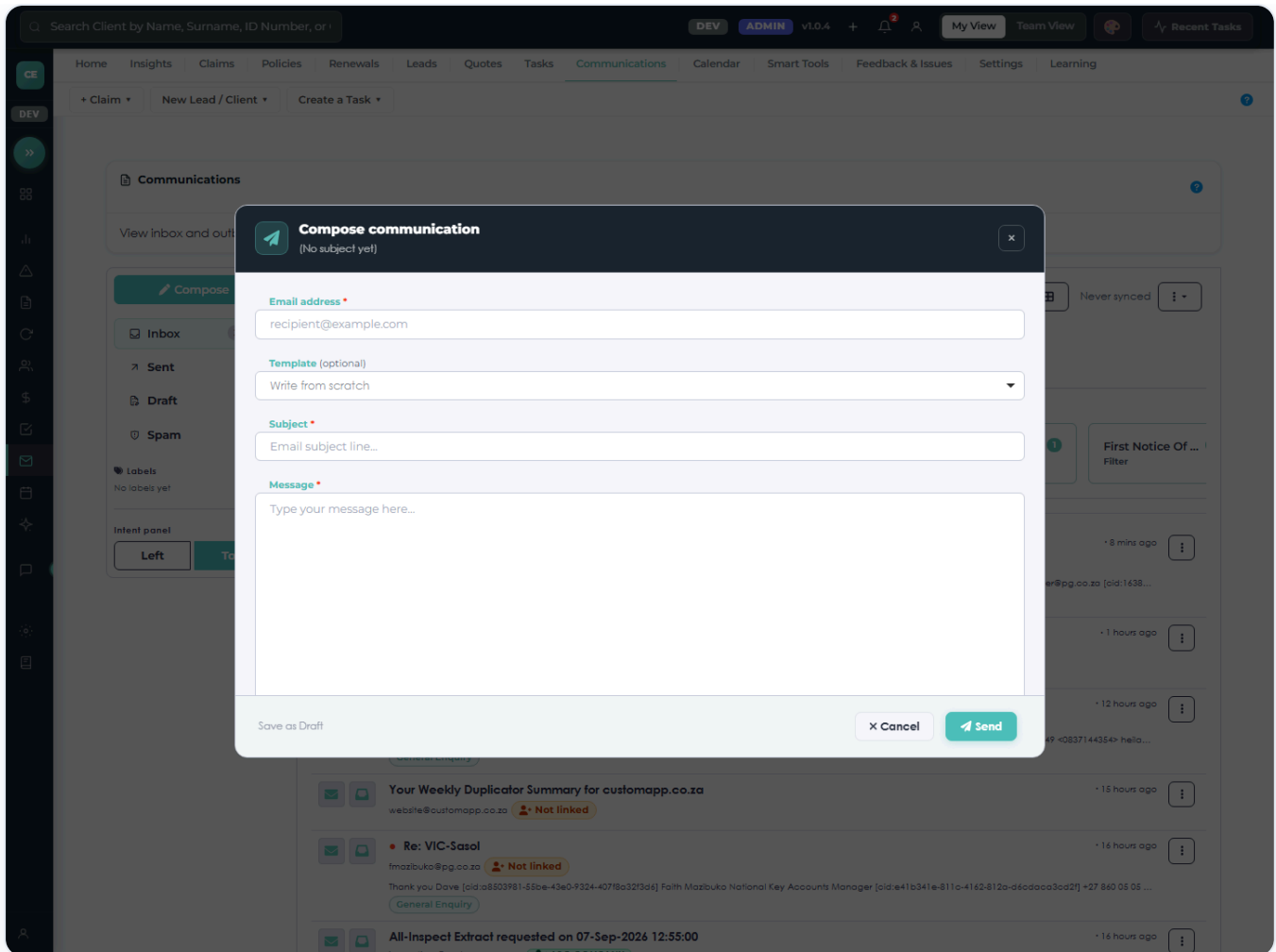
Client Communications merges inbox and outbox in one list: each row shows whether the item is **incoming** or **outgoing**, plus channel (email, WhatsApp, call). Outbound items can be draft, scheduled, sending, sent, or failed depending on your integration. Use search and filters to find a thread; open a row for delivery detail and linked workbench tasks.



1. Open **Communications** from the sidebar, section tabs, or **My Workbench**.
2. Scan for **outgoing** rows or filter the list when your build exposes direction or status chips.
3. Open an outbound item to review delivery steps, edit a draft, or retry a failed send.

Compose (Email / SMS / WhatsApp)

Compose communication opens in a modal: pick a channel, recipient, optional template, message body, and timing (**Send immediately**, **Save as draft**, or **Schedule for later** when enabled).



1. In **Client Communications**, choose **Compose**.
2. Select **Email**, **SMS**, or **WhatsApp**, then pick the recipient and optionally search or select a template.
3. Edit the message, review timing and approval requirements, then confirm with the primary button in the footer or use **Cancel** to leave without sending.

Open comparison

For quote-comparison workflows, open the comparison builder or client-facing comparison from the message actions. On **Client quote approval** messages, **Open quote approval task** opens the full **Quote comparison** workspace for the linked task (not a generic smart-form resume).

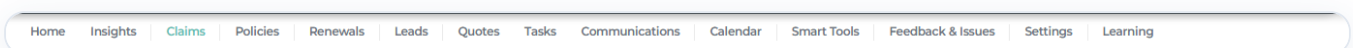
Screenshot: communications-open-comparison

Run `npm run screenshots:capture`, then `npm run screenshots:embed`

1. Open the message that relates to a multi-quote or comparison workflow.
 2. Choose **Open comparison**, **Build comparison**, or **Open quote approval task** when shown.
 3. Review insurer responses and send or save the comparison as guided by the modal.
-

My Book

My Book is your portfolio of client work in the portal: the five record grids **Claims**, **Policies**, **Renewals**, **Leads**, and **Quotes** in the left sidebar and matching **section tabs** across the top of the work area. Each grid only shows data for your book after you set a date range and press that screen's **Search** button.



Loading data (all My Book grids)

1. Open any My Book module from the **sidebar** or **section tabs** (Claims, Policies, Renewals, Leads, or Quotes).
2. Set **From** to **1 January 2025** (or the earliest date your organisation allows) and **To** to **today's date** using the two date fields on that screen (calendar on each field).
3. Choose **Search** and wait for the grid to finish loading before you read or filter rows.
4. Use the on-screen search box (for example **Search Claims**) to narrow rows *after* the grid has loaded for that date range.

Tip

The date labels differ per screen (for example **Date of Loss** on Claims, **Lead created** on Leads, **Quote date** on Quotes). On first open, each My Book grid defaults to the **current month** (From = 1st of the month, To = today) and loads results automatically. Your last From / To selection is remembered for the browser session and restored when you return. You can still change the dates and press **Search** to refresh.

Claims

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Search Client by Name, Surname, ID Number, or I

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My ViewTeam View

Recent Tasks

HomeInsightsClaimsPoliciesRenewalsLeadsQuotesTasksCommunicationsCalendarSmart ToolsFeedback & IssuesSettingsLearning

+ ClaimNew Lead / ClientCreate a Task

Claims

Export to Excel

All ClaimsOpen ClaimsSettled ClaimsRepudiated ClaimsClear Filters

Date of Loss20/05/202620/06/2026Search

Client	Claim number	Policy number	Product	Registered - cover	Handler	Amounts	Status
Ungerer Heila	KINCP-PERSON-5688105-00001829	5688105-0112646	Personal Scheme	25-Jun-2026 13:23:55 Householders	-	R 0.00 Est R 0.00 - Paid R 0.00 - Out R 0.00	FNOL Registered
Ungerer Heila	STM-STMEXE-5688105-00001952	STMEXE-0113631	Santam Executive	13-Jul-2026 19:44:57 All Risks	-	R 0.00 Est R 0.00 - Paid R 0.00 - Out R 0.00	FNOL Registered
Ungerer Heila	KINCP-PERSON-5688105-00001826	5688105-0112646	Personal Scheme	25-Jun-2026 13:18:55 Householders	-	R 0.00 Est R 0.00 - Paid R 0.00 - Out R 0.00	FNOL Registered
Roux Michelle	SUP0040-SIYAYA-5688089-00002172	SIYAYA-SUP0040-0112620	ABSA Siyaya Domestic	03-Sep-2026 10:24:48 Houseowners	-	R 0.00 Est R 0.00 - Paid R 0.00 - Out R 0.00	FNOL Registered
Ungerer Heila	FFW-CRSFIR-5688105-00001604	5688105-0112648TBA	First For Women Product	15-May-2026 18:57:15 Motor	-	R 0.00 Est R 0.00 - Paid R 0.00 - Out R 0.00	FNOL Registered
Ungerer Heila	STM-STMEXE-5688105-00001933	STMEXE-0113631	Santam Executive	12-Jul-2026 20:25:57 All Risks	-	R 0.00 Est R 0.00 - Paid R 0.00 - Out R 0.00	FNOL Registered
Ungerer Heila	SUP0040-00001150	5688105-0112648TBA	First For Women Product	17-Oct-2025 08:24:34 Motor	-	R 0.00 Est R 0.00 - Paid R 0.00 - Out R 0.00	FNOL Registered
Ungerer Heila	SUP0040-STMEXE-5688105-00002007	STMEXE-0113631	Santam Executive	27-Jul-2026 10:36:56 Houseowners	-	R 0.00 Est R 0.00 - Paid R 0.00 - Out R 0.00	FNOL Registered
Ungerer Heila	STM-STMEXE-5688105-00001911	STMEXE-0113631	Santam Executive	06-Jul-2026 14:33:55 Houseowners	-	R 0.00 Est R 0.00 - Paid R 0.00 - Out R 0.00	FNOL Registered
Roux Michelle	SUP0040-SIYAYA-5688089-00002175	SIYAYA-SUP0040-0112620	ABSA Siyaya Domestic	03-Sep-2026 10:28:49 Houseowners	-	R 0.00 Est R 0.00 - Paid R 0.00 - Out R 0.00	FNOL Registered

Showing Record(s) 1 to 10 [10 of 1444 Record(s)] — Page size: 10

Policies

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Search Client by Name, Surname, ID Number, or I

DEVADMINv1.0.4+🔔👤My ViewTeam View🔗Recent Tasks

HomeInsightsClaimsPoliciesRenewalsLeadsQuotesTasksCommunicationsCalendarSmart ToolsFeedback & IssuesSettingsLearning

+ Claim ▾

New Lead / Client ▾

Create a Task ▾

Policies

Export to Excel

Active Policies

Cancelled Policies

Date📅 20/05/2026 x 📅 20/06/2026 x 🔍 Search

🔍 Search Policies

Client / Policy #	Product #	Type #	Inception · Review #	Premium #	Branch #	Underwriter #
223166 Test Nadine CAR001-MUA-0113606	MUA Exec Home	Monthly	27-Jan-2026 01-Jan-2027	R 0.00 SASRIA R 4.54 · Comm R 0.00 · Fees R 0.00	CPT	ABAB ABAB
223166 Test Nadine HOLLAR-0011653	Holland AGRI Outsource 2024.4	Monthly	01-Mar-2025 01-Mar-2027	R 7,730.65 SASRIA R 8.74 · Comm R 1,544.46 · Fees R 0.00	CPT	Alice In Wonderland
Claims Regression_V464 COMMER-M-5272471-0008154	Commercial	Monthly	01-Nov-2021 01-Mar-2025	R 26,166.66 SASRIA R 243.43 · Comm R 5,233.34 · Fees R 10,500.00	JHB	-
SUP-270850 Test Nadine CONTRA-0111892	Contractors & Engineering	Monthly	01-Aug-2025 01-Sep-2026	R 206.66 SASRIA R 2.26 · Comm R 41.34 · Fees R 0.00	CPT	Adelle Johnson
Somerville Michael DOMEV2-0011187	Holland Private Portfolio V3.6	Monthly	01-Apr-2025 01-Apr-2027	R 3,429.28 SASRIA R 6.54 · Comm R 485.44 · Fees R 9,601.97	CPT	-
Workflow Trigger - CRISK Cyn Workflow	Holland Business V9 - Binder	Monthly	01-Apr-2026 01-Apr-2027	R 1,000.00 SASRIA R 29.05 · Comm R 200.00 · Fees R 0.00	JHB	-
2023 Product Testing 9996855-0012112	Renasa Personal Scheme	Monthly	23-Oct-2023 01-Nov-2025	R 2,717.19 SASRIA R 13.84 · Comm R 394.82 · Fees R 3,532.36	Avengers 1	-
MayTesting Holland MPP-0008548	Holland Prestige Portfolio	Monthly	01-May-2023 01-Sep-2025	R 1,533.03 SASRIA R 2.74 · Comm R 306.60 · Fees R 0.00	Avengers 1	-
TEST RD Workflow NBUS2-M-0115544	Holland Business V9 - Binder	Monthly	01-May-2026 01-Oct-2026	R -2,499.96 SASRIA R 0.00 · Comm R -499.98 · Fees R 0.00	CPT	-

Showing Record(s) 1 to 10 [10 of 62590 Record(s)] — Page size: 10 ▾

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Renewals

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Search Client by Name, Surname, ID Number, or I

DEVADMINv1.0.4+🔔👤My ViewTeam View👥Recent Tasks

HomeInsightsClaimsPoliciesRenewalsLeadsQuotesTasksCommunicationsCalendarSmart ToolsFeedback & IssuesSettingsLearning

+ Claim ▾New Lead / Client ▾Create a Task ▾

Leads

Export to Excel

Clear FiltersCreated📅20/05/2026 ×📅20/06/2026 ×🔍Search ⓘ

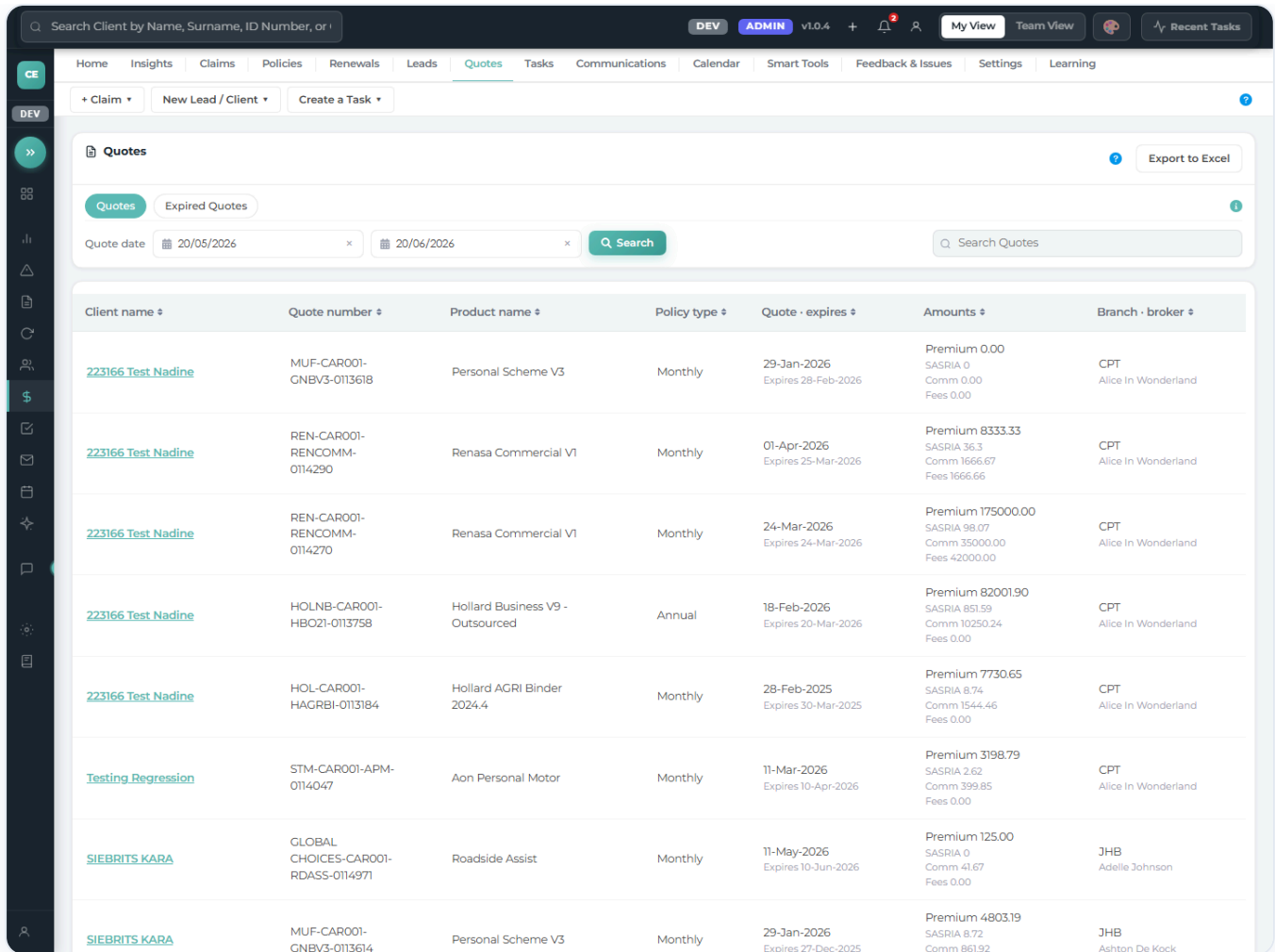
Search Leads

Client name ▾	Client type ▾	Client number ▾	Date added ▾	Branch ▾	Broker ▾	Lead ▾	Actions
Cayson Bexley	Individual	5688054	14-Aug-2025	Johannesburg	Heila Ungerer	Yes	⋮
Mbalu Zikalala	Individual	5688114	14-Oct-2025	Johannesburg	Heila Ungerer	Yes	⋮

Showing Record(s) 1 to 2 [2 of 2 Record(s)] — Page size: ▾

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Quotes



See the dedicated sections below for screen-specific filters, chips, and actions on each grid.

Claims

Part of **My Book**. The **Claims** grid lists claims for triage and drill-down. Use the toolbar chips (**All / Open / Settled / Repudiated**), set **Show up to** (how many claims to load; default 100), narrow by **Date of Loss — From** and **To**, and use **Search Claims** to filter the loaded claims. The section action bar typically includes + **Claim**, **Send email**, and **Tasks**.

The screenshot displays the 'Claims' section of a software application. At the top, there's a search bar for clients and navigation tabs like Home, Insights, Claims, Policies, Renewals, Leads, Quotes, Tasks, Communications, Calendar, Smart Tools, Feedback & Issues, Settings, and Learning. Below the tabs, there are buttons for '+ Claim', 'New Lead / Client', and 'Create a Task'. The main area shows a list of claims with filters for 'All Claims', 'Open Claims', 'Settled Claims', and 'Repudiated Claims'. A 'Date of Loss' filter is set from 20/05/2026 to 20/06/2026. A table lists claims with columns: Client, Claim number, Policy number, Product, Registered cover, Handler, Amounts, and Status. The table shows 10 records, all with a status of 'FNOL Registered'. At the bottom, there's a pagination bar showing 'Showing Record(s) 1 to 10 [0 of 1444 Record(s)]' and a 'Page size' dropdown set to 10.

Client #	Claim number #	Policy number #	Product #	Registered cover #	Handler #	Amounts #	Status #
Ungerer Heila	KINGP-PERSON-5688105-00001829	5688105-0112646	Personal Scheme	25-Jun-2026 13:23:55 Householders	-	R 0.00 Est R 0.00 · Paid R 0.00 · Out R 0.00	FNOL Registered
Ungerer Heila	STM-STMEXE-5688105-00001952	STMEXE-0113631	Santam Executive	13-Jul-2026 19:44:57 All Risks	-	R 0.00 Est R 0.00 · Paid R 0.00 · Out R 0.00	FNOL Registered
Ungerer Heila	KINGP-PERSON-5688105-00001826	5688105-0112646	Personal Scheme	25-Jun-2026 13:18:55 Householders	-	R 0.00 Est R 0.00 · Paid R 0.00 · Out R 0.00	FNOL Registered
Roux Michelle	SUP0040-SIYAYA-5688089-00002172	SIYAYA-SUP0040-0112620	ABSA Siyaya Domestic	03-Sep-2026 10:24:48 Houseowners	-	R 0.00 Est R 0.00 · Paid R 0.00 · Out R 0.00	FNOL Registered
Ungerer Heila	FFW-CRSEFIR-5688105-00001604	5688105-0112648TBA	First For Women Product	15-May-2026 18:57:15 Motor	-	R 0.00 Est R 0.00 · Paid R 0.00 · Out R 0.00	FNOL Registered
Ungerer Heila	STM-STMEXE-5688105-00001933	STMEXE-0113631	Santam Executive	12-Jul-2026 20:25:57 All Risks	-	R 0.00 Est R 0.00 · Paid R 0.00 · Out R 0.00	FNOL Registered
Ungerer Heila	SUP0040-00001150	5688105-0112648TBA	First For Women Product	17-Oct-2025 08:24:34 Motor	-	R 0.00 Est R 0.00 · Paid R 0.00 · Out R 0.00	FNOL Registered
Ungerer Heila	SUP0040-STMEXE-5688105-00002007	STMEXE-0113631	Santam Executive	27-Jul-2026 10:36:56 Houseowners	-	R 0.00 Est R 0.00 · Paid R 0.00 · Out R 0.00	FNOL Registered
Ungerer Heila	STM-STMEXE-5688105-00001911	STMEXE-0113631	Santam Executive	06-Jul-2026 14:33:55 Houseowners	-	R 0.00 Est R 0.00 · Paid R 0.00 · Out R 0.00	FNOL Registered
Roux Michelle	SUP0040-SIYAYA-5688089-00002175	SIYAYA-SUP0040-0112620	ABSA Siyaya Domestic	03-Sep-2026 10:28:49 Houseowners	-	R 0.00 Est R 0.00 · Paid R 0.00 · Out R 0.00	FNOL Registered

1. Open **Claims** from the sidebar or section tabs (see [My Book](#)).
2. In **Show up to**, enter how many claims to load (1 to 5000; the default is 100). **Search** reloads the list from the server, so use it after changing that number or to refresh.
3. Choose **All**, **Open**, **Settled** or **Repudiated**, and set **Date of Loss** From and To if you want to narrow the list (both days included). The grid updates as soon as you pick a chip or pick or clear a date, with no need to press Search.
4. Use **Search Claims** to find a claim: typing narrows the page you are on, and pressing **Enter** searches every loaded claim. Column sorting works on the page you are viewing. The claim amount is shown; the estimate, paid and outstanding amounts are not available in this list.
5. Open a row to view claim detail, documents, and related communications.
6. To register a new claim from the header **Register claim** flow: choose client → policy → date of loss → risk item → claim type. Use ← **Change policy**, ← **Change date of loss**, or ← **Change risk item** to step back one popup (the date of loss stays filled when you return). ← **Change policy** appears only when you started from Register claim (or inbox/workflow), not when you start from **Register a claim** on an already-open client's Policies tab. **X / Cancel** still closes and cancels the whole registration.

Policies

Part of **My Book**. Review in-force policies, endorsements, and key policy data. Choose **Active Policies** or **Cancelled Policies**, set how many to load in **Show up to** (default 100), then narrow the list with the dates and **Search Policies**.

The screenshot displays the 'Policies' section of a web application. The interface includes a top navigation bar with tabs for Home, Insights, Claims, Policies (selected), Renewals, Leads, Quotes, Tasks, Communications, Calendar, Smart Tools, Feedback & Issues, Settings, and Learning. A sidebar on the left contains various icons for navigation. The main content area shows a table of active policies. The table has columns for Client / Policy, Product, Type, Inception · Review, Premium, Branch, and Underwriter. The table is filtered for 'Active Policies' and shows 10 records. The page includes a search bar and a 'Show up to' dropdown set to 10. The page footer shows 'Showing Record(s) 1 to 10 [10 of 62590 Record(s)]' and a pagination bar with links 1, 2, 3, 4, and 6259.

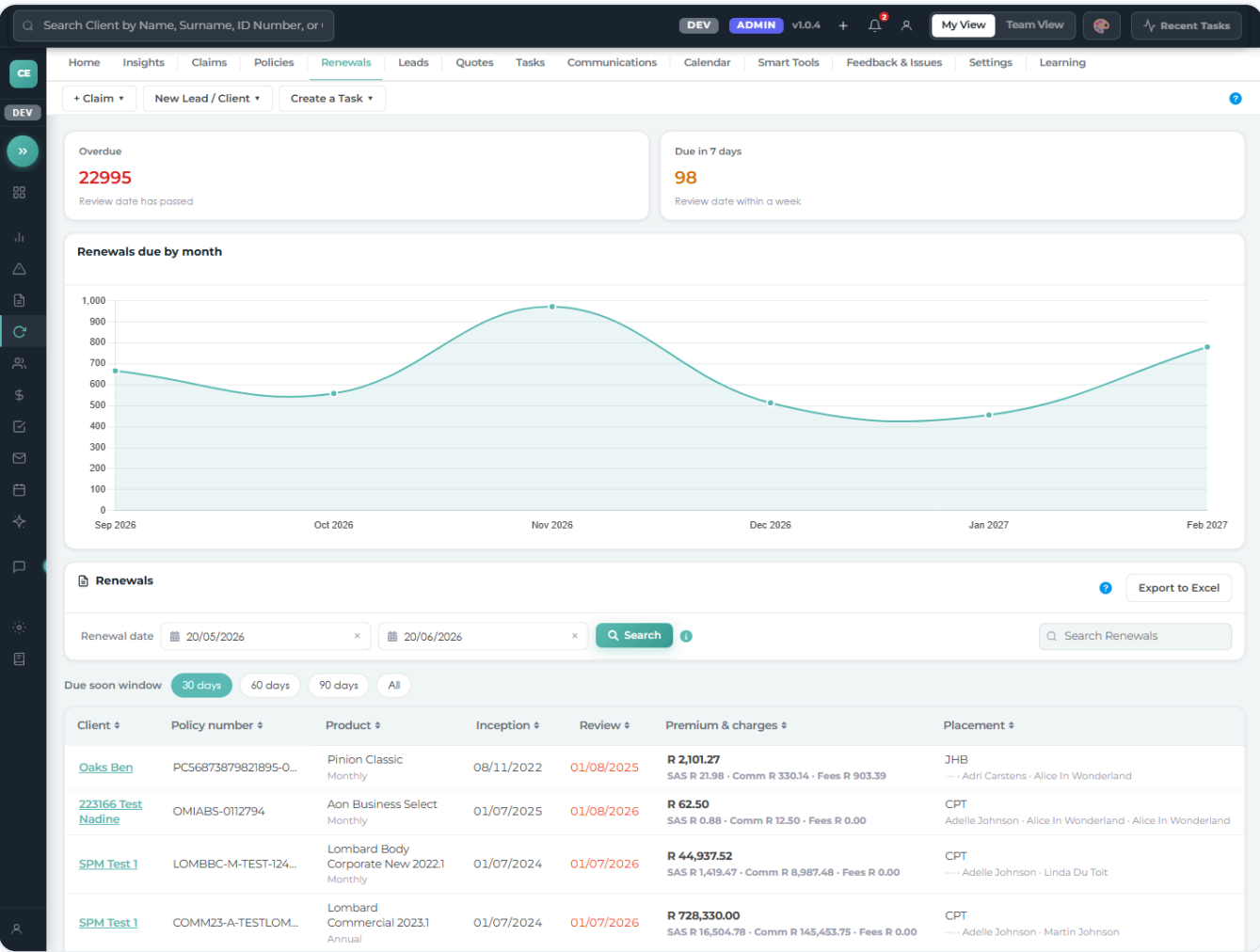
Client / Policy	Product	Type	Inception · Review	Premium	Branch	Underwriter
223166 Test Nadine CAR001-MUA-0113606	MUA Exec Home	Monthly	27-Jan-2026 01-Jan-2027	R 0.00 SASRIA R 4.54 · Comm R 0.00 · Fees R 0.00	CPT	ABAB ABAB
223166 Test Nadine HOLLAR-0011653	Holland AGRI Outsource 2024.4	Monthly	01-Mar-2025 01-Mar-2027	R 7,730.65 SASRIA R 8.74 · Comm R 1,544.46 · Fees R 0.00	CPT	Alice In Wonderland
Claims Regression_V464 COMMER-M-5272471-0008154	Commercial	Monthly	01-Nov-2021 01-Mar-2025	R 26,166.66 SASRIA R 243.43 · Comm R 5,233.34 · Fees R 10,500.00	JHB	-
SUP-270850 Test Nadine CONTRA-M-0111892	Contractors & Engineering	Monthly	01-Aug-2025 01-Sep-2026	R 206.66 SASRIA R 2.26 · Comm R 41.34 · Fees R 0.00	CPT	Adelle Johnson
Somerville Michael DOMEV2-0011187	Holland Private Portfolio V3.6	Monthly	01-Apr-2025 01-Apr-2027	R 3,429.28 SASRIA R 6.54 · Comm R 485.44 · Fees R 9,601.97	CPT	-
Workflow Trigger - CRISK Cyn Workflow	Holland Business V9 - Binder	Monthly	01-Apr-2026 01-Apr-2027	R 1,000.00 SASRIA R 29.05 · Comm R 200.00 · Fees R 0.00	JHB	-
2023 Product Testing 9996855-001212	Renasa Personal Scheme	Monthly	23-Oct-2023 01-Nov-2025	R 2,717.19 SASRIA R 13.84 · Comm R 394.82 · Fees R 3,532.36	Avengers 1	-
MayTesting Holland MPP-0008548	Holland Prestige Portfolio	Monthly	01-May-2023 01-Sep-2025	R 1,533.03 SASRIA R 2.74 · Comm R 306.60 · Fees R 0.00	Avengers 1	-
TEST RD Workflow NBUS2-M-0115544	Holland Business V9 - Binder	Monthly	01-May-2026 01-Oct-2026	R -2,499.96 SASRIA R 0.00 · Comm R -499.98 · Fees R 0.00	CPT	-

1. Open **Policies** from the sidebar or section tabs (see [My Book](#)).
2. Choose **Active Policies** or **Cancelled Policies**. Each loads its own list, up to the **Show up to** number (1 to 5000; the default is 100). **Search** reloads the list from the server, so use it after changing that number or to refresh.
3. Set **From** and **To** to narrow the loaded policies to those whose start date or review date falls in that range (both days included). The grid updates as soon as you pick or clear a date, with no need to press Search.
4. Use **Search Policies** to find a policy: typing narrows the page you are on, and pressing **Enter** searches every loaded policy. Column sorting works on the page you are viewing.

5. Select a policy to open schedule or detail views as available.

Renewals

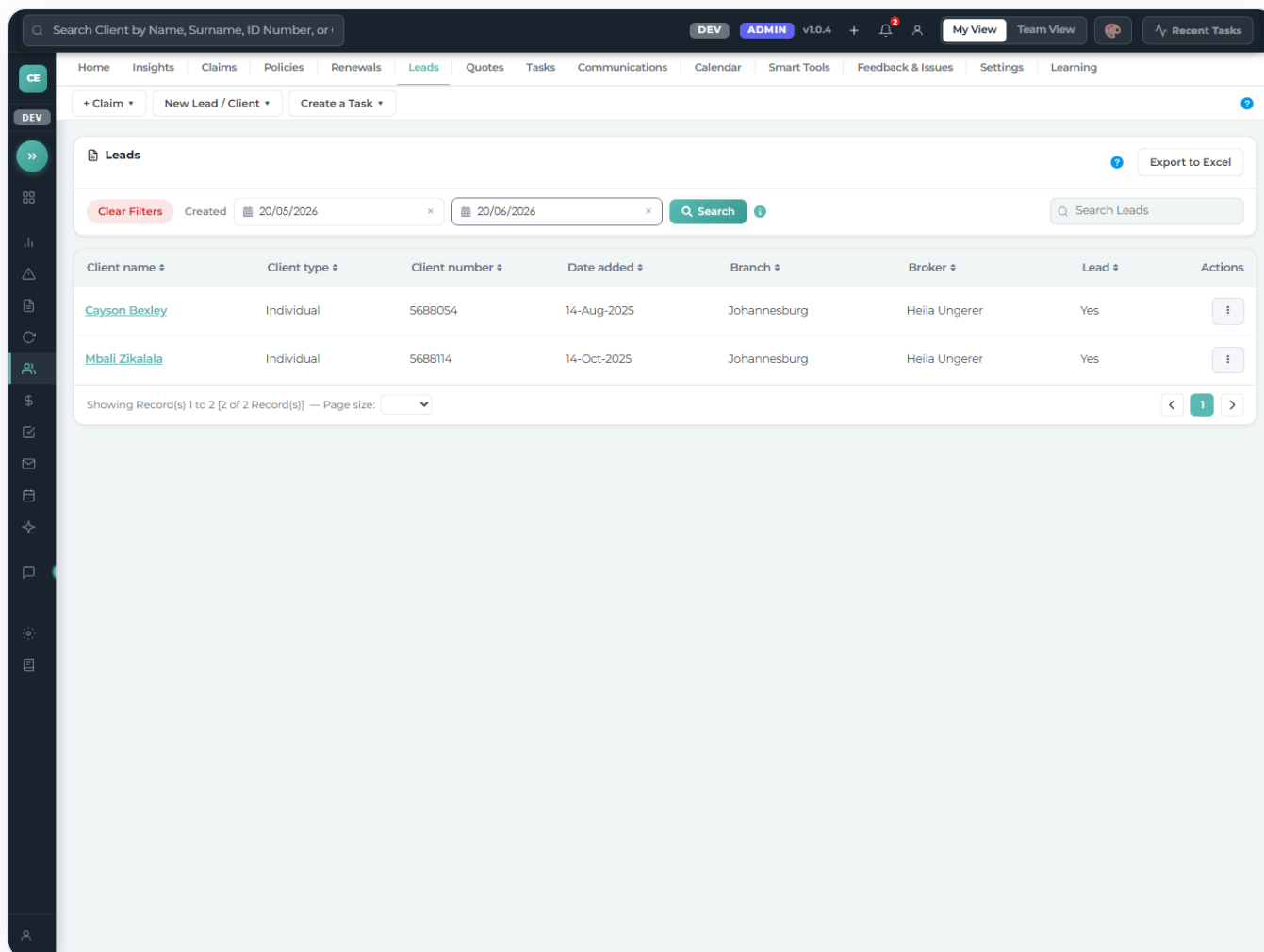
Part of **My Book**. Track upcoming renewals and take action on items that need a quote, endorsement, or client contact. Pick **Monthly** or **Outstanding** where shown, set **From** (from 1 Jan 2025) and **To** (today), then **Search** before reading the grid. When columns are wider than the screen, use the horizontal scrollbar at the top of the table or below the rows (same as [Claims](#)).



1. Open **Renewals** from the sidebar or section tabs (see [My Book](#)).
2. Set **From** and **To**, then **Search** so renewals for that window appear.
3. Sort or use **Search Renewals** to narrow by client or text on screen.
4. Open a renewal to continue the workflow (quote, document, or task).

Leads

Part of **My Book**. Manage new business leads: create, assign, and convert leads into quotes or client records. Set **Lead created — From** (from 1 Jan 2025) and **To** (today), then **Search** to load the grid, then **Search Leads** to filter loaded rows.



1. Open **Leads** from the sidebar or section tabs (see [My Book](#)).
2. Set **From** and **To**, then **Search** to refresh the list for that range.
3. Use **Create lead** or the grid actions to add or update a lead. On the **New Lead** form, read the short hint, then pick **Company** or **Individual** (the detail fields and **Create Lead** unlock after that); optional **Document Ingestion** on the right can pre-fill from a file.
4. Open a lead row to capture detail and start a quote where integrated.

New Multi-Quote — Quote Details and documents

On **Quote Details**, use the **Continue** button at the bottom of the page (same bar style as Lead Declaration) after selecting insurers. After **Continue**, **Policy Contents** shows selected insurer logos and cover-type rows (icon, name, **Add Item**, expand chevron) in the same card style as the C360 journey. Upload via **Add document** or the first-time overview. The **Uploaded documents** table lists each file; use the row ⋮ menu for **Open** or **Delete**. Deleting opens the same journey-styled confirmation modal as other steps—choose **Cancel** or **Delete**. When you finish and use **Quote** to submit, after the quote is queued you are taken to **Quote comparison** (insurer results may still be loading—use **Quotes (WIP)** from the menu if you need the work-in-progress grid).

Screenshot: multiquote-quote-details-documents

Run `npm run screenshots:capture`, then `npm run screenshots:embed`

New Multi-Quote — Quote comparison

This step uses the same C360 journey layout as **Quote Details**: header, stepper, and card sections. Compare insurer cards side by side, then **Select** a product to continue to **Select and save**. Use **Edit Quote** to return to cover and policy contents, or **Back** for **Available quotes**. If no cards appear yet, use **Quotes (WIP)** from the empty-state action.

Screenshot: quote-comparison

Run `npm run screenshots:capture`, then `npm run screenshots:embed`

Quotes

Part of **My Book**. Browse completed and expired quotes from your book. Switch between **Quotes** and **Expired Quotes** where available. The grid defaults to the current month and remembers your last date range; press **Search** after changing dates. Rows are read-only — choose the **client name** link on a row to open that client's profile. For in-progress multi-quote journeys, use [Quotes \(WIP\)](#).

Client name	Quote number	Product name	Policy type	Quote - expires	Amounts	Branch - broker
223166 Test Nadine	MUF-CAR001-GNBV3-0113618	Personal Scheme V3	Monthly	29-Jan-2026 Expires 28-Feb-2026	Premium 0.00 SASRIA 0 Comm 0.00 Fees 0.00	CPT Alice In Wonderland
223166 Test Nadine	REN-CAR001-RENCOMM-0114290	Renasa Commercial V1	Monthly	01-Apr-2026 Expires 25-Mar-2026	Premium 8333.33 SASRIA 36.3 Comm 1666.67 Fees 1666.66	CPT Alice In Wonderland
223166 Test Nadine	REN-CAR001-RENCOMM-0114270	Renasa Commercial V1	Monthly	24-Mar-2026 Expires 24-Mar-2026	Premium 175000.00 SASRIA 98.07 Comm 35000.00 Fees 42000.00	CPT Alice In Wonderland
223166 Test Nadine	HOLNB-CAR001-HBO21-0113758	Holland Business V9 - Outsourced	Annual	18-Feb-2026 Expires 20-Mar-2026	Premium 82001.90 SASRIA 851.59 Comm 10250.24 Fees 0.00	CPT Alice In Wonderland
223166 Test Nadine	HOL-CAR001-HAGRBI-0113184	Holland AGRI Binder 2024.4	Monthly	28-Feb-2025 Expires 30-Mar-2025	Premium 7730.65 SASRIA 8.74 Comm 1544.46 Fees 0.00	CPT Alice In Wonderland
Testing Regression	STM-CAR001-APM-0114047	Aon Personal Motor	Monthly	11-Mar-2026 Expires 10-Apr-2026	Premium 3198.79 SASRIA 2.62 Comm 399.85 Fees 0.00	CPT Alice In Wonderland
SIEBRITS KARA	GLOBAL CHOICES-CAR001-RDASS-0114971	Roadside Assist	Monthly	11-May-2026 Expires 10-Jun-2026	Premium 125.00 SASRIA 0 Comm 41.67 Fees 0.00	JHB Adelle Johnson
SIEBRITS KARA	MUF-CAR001-GNBV3-0113614	Personal Scheme V3	Monthly	29-Jan-2026 Expires 27-Dec-2025	Premium 4803.19 SASRIA 8.72 Comm 861.92	JHB Ashton De Kock

1. Open **Quotes** from the sidebar or top section tabs (see [My Book](#)).
2. Set **From** and **To** to narrow the loaded quotes by the **Quote date** shown in the grid (both days included). The grid updates as soon as you pick or clear a date, with no need to press Search. The date range, the **Expired Quotes** filter and the search box all work across every quote loaded, and the page numbers follow the result.
3. In **Show up to**, enter how many quotes to load (1 to 5000; the default is 100), then press **Search** or Enter. **Search** reloads the list from the server, so use it after changing this number or to refresh. Raise the number to reach older quotes; lower it for a faster load.
4. Use the search box to find a quote: typing narrows the page you are on, and pressing **Enter** searches every loaded quote. Column sorting works on the page you are viewing.
5. Choose the **client name** link on a row to open that client's profile and continue work from there.

Quotes (WIP)

Multi-quote journeys still in progress. Set **Quote date** (from and to), then press **Search**. Use the search box to filter rows on screen. If nothing matches, the page shows **There are no matching records**. Start a new journey with **Start New Multi-Quote**, or continue from the row menu.

Search Client by Name, Surname, ID Number, or I

DEVADMINv1.0.4My ViewTeam ViewRecent Tasks

HomeInsightsClaimsPoliciesRenewalsLeadsQuotesTasksCommunicationsCalendarSmart ToolsFeedback & IssuesSettingsLearning

+ ClaimNew Lead / ClientCreate a Task

QuotesExpired Quotes

Quote date20/05/202620/06/2026Search

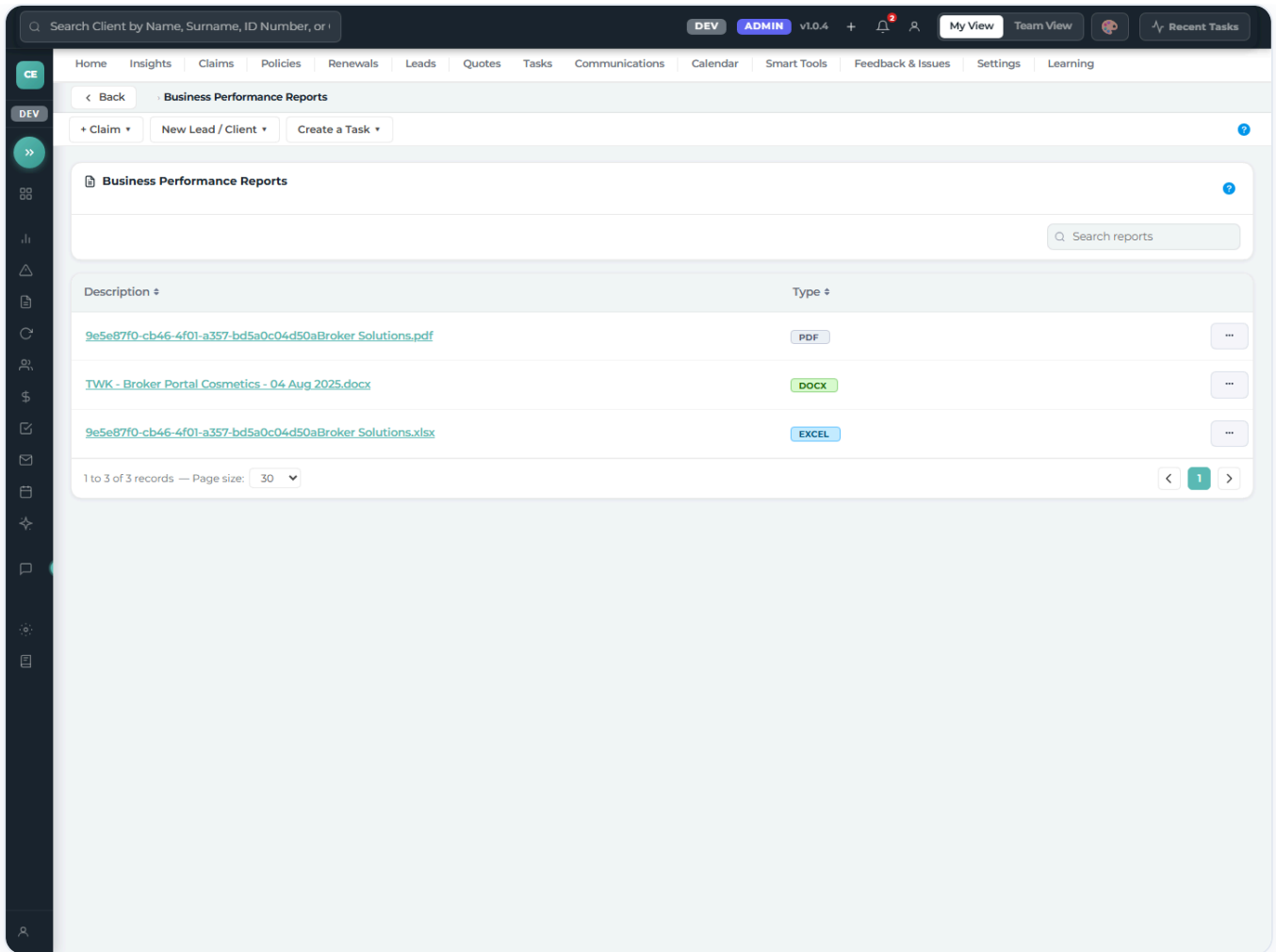
Search Quotes

Client name	Quote number	Product name	Policy type	Quote expires	Amounts	Branch broker
223166 Test Nadine	MUF-CAR001-GNBV3-0113618	Personal Scheme V3	Monthly	29-Jan-2026 Expires 28-Feb-2026	Premium 0.00 SASRIA 0 Comm 0.00 Fees 0.00	CPT Alice In Wonderland
223166 Test Nadine	REN-CAR001-RENCOMM-0114290	Renasa Commercial V1	Monthly	01-Apr-2026 Expires 25-Mar-2026	Premium 8333.33 SASRIA 36.3 Comm 1666.67 Fees 1666.66	CPT Alice In Wonderland
223166 Test Nadine	REN-CAR001-RENCOMM-0114270	Renasa Commercial V1	Monthly	24-Mar-2026 Expires 24-Mar-2026	Premium 175000.00 SASRIA 98.07 Comm 35000.00 Fees 42000.00	CPT Alice In Wonderland
223166 Test Nadine	HOLNB-CAR001-HBO21-0113758	Holland Business V9 - Outsourced	Annual	18-Feb-2026 Expires 20-Mar-2026	Premium 82001.90 SASRIA 851.59 Comm 10250.24 Fees 0.00	CPT Alice In Wonderland
223166 Test Nadine	HOL-CAR001-HACRBI-0113184	Holland AGRI Binder 2024.4	Monthly	28-Feb-2025 Expires 30-Mar-2025	Premium 7730.65 SASRIA 8.74 Comm 1544.46 Fees 0.00	CPT Alice In Wonderland
Testing Regression	STM-CAR001-APM-0114047	Aon Personal Motor	Monthly	11-Mar-2026 Expires 10-Apr-2026	Premium 3198.79 SASRIA 2.62 Comm 399.85 Fees 0.00	CPT Alice In Wonderland
SIEBRITS KARA	GLOBAL CHOICES-CAR001-RDASS-0114971	Roadside Assist	Monthly	11-May-2026 Expires 10-Jun-2026	Premium 125.00 SASRIA 0 Comm 41.67 Fees 0.00	JHB Adelle Johnson
SIEBRITS KARA	MUF-CAR001-GNBV3-0113614	Personal Scheme V3	Monthly	29-Jan-2026 Expires 27-Dec-2025	Premium 4803.19 SASRIA 8.72 Comm 861.92	JHB Ashton De Kock

1. Open **Quotes (WIP)** from the sidebar or top section tabs.
2. Set filters and choose **Search** to load work-in-progress quotes.
3. Use **Continue Quote** from the row menu to resume a journey at its current stage.

Business performance reports

Same entry as in the app: **Business Performance Reports** in the sidebar. Run grids, pick parameters, and use **Send report** when that flow is enabled. The send screen uses the same channel cards and layout as **Send Policy Schedule** on a client's policy (WhatsApp / E-mail and Send).

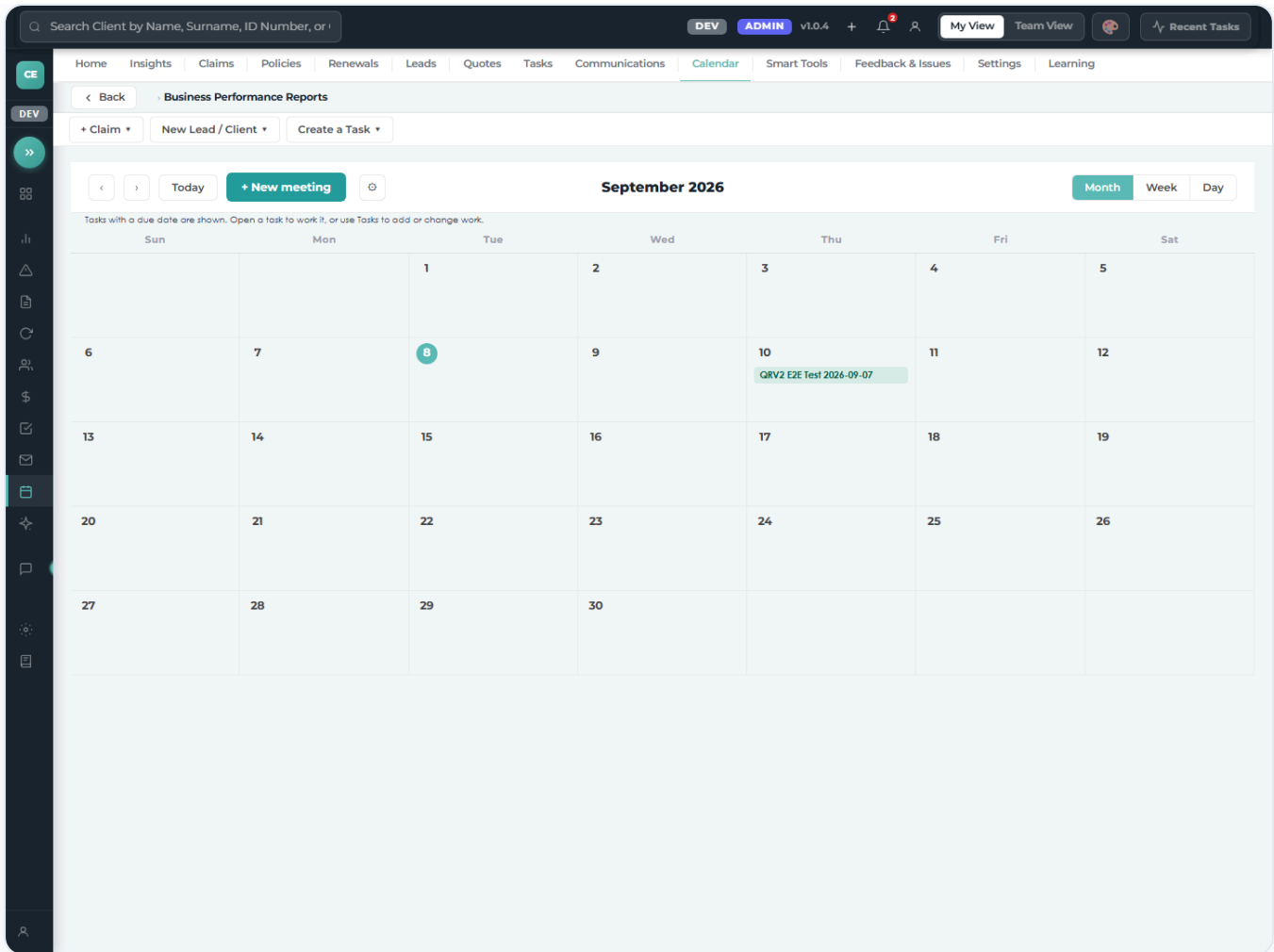


1. Open **Business Performance Reports** from the sidebar (or section tabs).
2. Choose parameters such as date range and report type.
3. Run the report; use **Send report** when you need to email a copy.

Calendar

You can plan work in a calendar from two places: the **Calendar** item in the sidebar (organisation-wide scheduling), and the **Calendar** view on **My Workbench** next to the dashboard toggle—typically colour-coded for renewals, appointments, tasks, opportunities, claims, and similar types.

Sidebar Calendar



1. Open **Calendar** from the sidebar or section tabs.
2. Switch views (day / week / month) if your build exposes them.
3. Select an entry to open the underlying task or appointment.

My Workbench calendar view

1. On **My Workbench**, choose the calendar icon in the toolbar; the grid icon returns to dashboard cards and lists.
2. Use the calendar's navigation controls to move between days or ranges; legend or filters help focus on one event type when your build shows them.
3. Select an entry to open its detail or linked task.

Connect your Outlook or Google calendar

Once connected, your own meetings appear alongside your tasks in the Week/Day (time grid) and Month calendar views, and you can schedule, edit and cancel meetings from Portal as well as from Outlook or Google directly. Only your own connected calendars are shown, never a colleague's.

1. Open **Calendar**.
2. Choose the gear icon (**Calendar settings**) in the toolbar.

3. Pick **Connect Outlook / Microsoft 365** or **Connect Google Calendar**.
4. Sign in and approve access in the pop-up window.
5. Your meetings appear in the Week/Day and Month views within a minute, and refresh automatically every 15 minutes.
6. **Sync now** and **Disconnect** are available in the same Calendar settings dialog for each connected calendar.

Schedule, edit and cancel meetings

With a calendar connected, meetings you create or change in Portal are sent to Outlook or Google and to your attendees.

1. Choose **+ New meeting** in the Calendar toolbar to schedule a meeting: set the title, date/time, location, attendees, video call, repeat and reminder, then choose **Save & send invites**.
 2. Click any meeting block (whether synced from your calendar or created in Portal) to open it for editing; change any field and choose **Save changes**.
 3. Choose **Cancel meeting** in that same dialog to cancel it; this notifies attendees and removes it from your calendar.
 4. A recurring meeting is edited or cancelled as a whole series, not as a single occurrence.
-

Smart Tools workbench

AI document analysis under **Smart Tools** (powered by the BrokerLens engine). The workbench follows a **client-first flow**: pick a client, choose their documents, then run an analysis. Every run is saved to history so you can **review** the stored result or **rerun** it later.

1. Open **Smart Tools**. Choose **New Analysis** for the unified workbench, or a specific tile (Quote Comparison, Renewal Analysis, Wording Difference, Gap Analysis, Claims Review, Bordereaux, Form Pre-fill) to pre-select that analysis type. The featured **New Analysis** card sits above the tool shortcuts; each shortcut tile shows a one-line description of what it does.
2. Use the **Client Files** tab to search for a client — the search field opens the same top-bar client search overlay as **New Analysis** Step 1. Pick a client from **Recently worked on** (or run a search in the overlay) to open their EDS documents and activity history. When viewing a client, **Back** and breadcrumbs (**Smart Tools** → **Client Files**) appear in a bar directly under the Smart Tools header (above client context), matching Quote Comparison; use them to return to the client list.

3. **Step 1 — Client & documents.** Search by name, ID number or cellphone (document upload stays locked until a client is chosen). After you pick a client, their **profile strip** appears under the **New Analysis** heading (with **Clear** to remove context). Clicking **New Analysis** again starts a fresh analysis with no client selected. Add documents using **either or both** paths, as many times as needed: + **Include** on files from the client's EDS profile, and/or the **From your computer** panel — drag and drop one or more PDFs onto it, or click **Upload document** to pick files, and each one uploads immediately and joins the pool in **Review selected documents** rather than replacing it. Tick **Also save uploaded documents to this client's EDS** under the drop zone to file a copy to their record at the same time. Review the **Selected documents** list at the bottom of the same card before continuing. The top stepper shows progress: *Client & documents* → *Analysis types* → *Running* → *Results*. A **How it works** card beside Step 1 and Step 2 gives a numbered recap of all four steps, with the current step highlighted and finished steps ticked; use its chevron to collapse it if you don't need it. Until a client is linked, a **Link a client first** note explains why the document panels are locked; clicking the locked upload area opens the client search for you.
4. **Step 2 — Select analysis types.** Scroll down in the same column to the analysis-type checklist (Quote Comparison, Renewal, Wording Difference, Gap, Claims, Bordereaux, Life Cover, Form Pre-fill). Select **one or more** types; hub tiles pre-check their type but you can add more. Press **Start N analyses** at the bottom of Step 2 when ready.
5. **Step 3 — Running & results.** Selected analyses run in parallel where possible. As each type finishes, its summary appears below the status list while others still show as *running*; switch tabs between completed results without waiting for the rest. When all are done, use **View full results** or **Send to client** per type — the Output screen uses the same C360 **Back** + breadcrumb bar (below the Smart Tools header, above the client profile) as analyse to switch between analysis types, switch between analysis types using the **pill tabs** in the results bar — each tab has a white card with the analysis icon, name, and status (*Running*, *Ready*, or *Failed*). When a client was selected in Step 1, **Back** and breadcrumbs sit directly under the Smart Tools header; their profile (name, contact details, avatar) appears in a bar below that so you always know which client the running analyses are for. Every analysis step (quote comparison, renewal, gap, and other types) and **Form Pre-fill** use the same C360 **Back** + breadcrumb bar (**Smart Tools** › analysis type) below that client bar. Tabs are separated by borders inside the white toolbar, with instructions at the bottom of that panel explaining how to switch tabs and use **Send to client** for the active analysis — each tab shows the **full inline results** for that type while others may still be running. Use **Send to client** for the active tab.
6. Finalise to the output view. The primary path reads top to bottom: **executive summary**, your **reason for recommendation** (open *Discussion & negotiation notes* under it for the optional extra note fields), **documents and reports**, then **smart email templates**. The **Post-**

Analysis Checklist uses portal teal checkboxes; generating a document (for example Record of Advice or Confirmation of Cover) ticks the matching step automatically. The **Push to Broker Portal** card (log to Communications, create a task, link to quote, save to documents) and the **Activity** run log start collapsed — expand them with the chevron when you need them. Documents that offer **variants** (for example the Record of Advice — renewal, replacement, and so on) **remember each version you generate**: switch the picker back to one you have already produced and it appears instantly, at no extra AI cost.

7. **Request a client signature while composing.** Use the normal **Compose** action on the primary client email. The communication modal includes a default-on **Request client signature** switch; leave it on to create a secure signing link automatically when you send, or turn it off for a normal email or WhatsApp message. Every **analysis PDF ticked in Attachments** is included (Quote Comparison, Renewal, Gap, Wording Difference, and other completed analyses). One analysis uses a single-document link; several analyses share **one secure link** where the client can move between tabs, use **Next analysis**, and **Submit signature** on each (or finish the last after all are signed). The client opens the link without logging in, reviews each PDF, and either signs (draw signature + name) or declines with an optional reason. For **Quote Comparison**, they must pick which insurer/option they want before signing. After signing, each signature is stamped onto that PDF and saved to the client's documents. Output shows status per analysis (**Pending, Viewed, Signed, or Declined**); use **View signed PDF** when available. Analysis History shows a **Client signed** or **Client declined** badge. The broker who sent the request also gets a **notification bell** alert (alongside Feedback & Issues updates) that opens Smart Tools for that analysis.
8. **Link email (optional).** When composing an email to a client — for an analysis, Smart Form, or any client-facing send — a **Link email** control appears below the **Message** field (email channel only, when a client is selected). Click it to expand a scrollable list of recent inbound emails from that client. Pick one; a card appears showing the subject, sender, and date with the note *"Linked email will be quoted below your message when sent"*. The original email is **not edited into your draft** — it is appended automatically at send time as a readable quote block (From, Date, Subject, and sanitised body text) below your message. Click **Remove** on the card to deselect. If no email is linked, the outgoing message is sent as normal. The picker is hidden on the WhatsApp channel. Sent messages that included a linked email are recorded in the client activity audit with a reference to the original inbound email.
9. **Smart email templates** draft the message with AI. Choosing a template or **Send to Client** on a **client-facing** message opens the same centred compose modal as [Communications](#) (title **Send to client**): use the **Email** or **WhatsApp** toggle at the top. **Email** shows **Email address** (from the Step 1 client), optional **Template, Subject** (prefilled from the client name and active analysis type — e.g. renewal, gap analysis — before the AI draft finishes), and **Message** with paragraphs and section breaks, plus **Cancel** and teal **Send**. Smart Tools

compose emails (to the client, winning insurer, unsuccessful insurers, and prior insurer) are sent **from your configured mailbox** ([Settings → Email Configuration](#)), the same path as Communications replies — not a separate Resend / Alert delivery mailbox. **WhatsApp** shows **Mobile number** (prefilled from the client when available; you can type any number), a short AI-drafted **summary** (no subject), and **Send via WhatsApp**. Below the message, an **Attachments** strip lists completed analysis PDFs (one per analysis type you ran in Step 2). When an analysis includes a comparison table (quote comparison, renewal, gap, wording difference, and similar), a compact **Include as Excel** checkbox appears beside the **Attachments** label — tick it to add the workbook alongside your PDFs (on WhatsApp it sends Excel instead of the selected PDF). Optional generated Output documents you have ready (ROA, Client Summary, and so on). Each chip has a tick to include on email, a **View** link opens the attachment in a named browser tab (the tab title matches the attachment name; clicking **View** again reuses the same tab), and on WhatsApp a single-file picker (PDF or Excel, default PDF). Internal and insurer templates use the same attachment strip when analysis results exist. If WhatsApp is not configured for your brokerage, the WhatsApp tab is disabled with a short reason. Review the fields, then send to deliver immediately. After a successful send, a white confirmation toast in the bottom-right shows the recipient **email address** or **mobile number**. Email uses your brokerage's **Alert delivery** settings in [Settings → AI configuration](#) (Resend API key and From address); WhatsApp uses your brokerage's Chatflow WhatsApp account. Successful sends are logged to **My Work** like email.

10. **History.** The workbench shows recent analyses (and the selected client's past analyses). Each card or list row shows the analysis type, status, **client** (name and contact where available), **source documents**, and the **date and time** the run was created. Opening an analysis from this history shows **that analysis's client** with their details. Use the **Cards** or **List** toggle beside the count to switch between card layout and compact activity rows when scanning many runs; your choice is remembered in this browser. When there are more than ten analyses, use the pager at the bottom of the history panel (**1–10 of 50**, page numbers, previous/next) to move through pages. Use **Review** to reopen saved work with no AI cost: comparison and analysis runs return to the **step you were on last** (Documents, Analyse, or Output); **Form Pre-fill** runs restore the form editor with saved fields, send progress, and the **Client activity** panel beside the editor (live link-based milestones, then review/file actions after the client submits).
11. Use **Form Pre-fill** after the client and documents are set: the **Smart Tools** header stays visible (with the help icon and step-by-step guide on the right); use **Back** in the breadcrumb bar to return to the hub. When a client is linked, their profile strip appears below the back bar (with **Clear**). Select **one or more** forms to generate (claims, ROA, FNA, etc.) from the same uploaded document. Optionally set branding below the form grid (paste your website URL and click **Fetch**, or upload a **CI guide** PDF/image to extract colours and fonts, then pick one of up to three colour palettes). **Fetch** prefers colours sampled from the site logo first,

then page CSS accents, so button/CTA greens are less likely to outrank the real brand. A white confirmation toast appears bottom-right when branding is applied (and again if you click **Save as default**); fetch or CI errors show the same toast style with a red stripe. Then click **Generate & Pre-fill** at the bottom of the branding section (no need to scroll back up). Review AI-filled fields in the editor tabs, presented as numbered section cards with a Client · Policy · Adviser summary strip and clear AI vs client blocks (Montserrat typography matches the rest of the portal), then choose **Send to Client** in the editor — this opens the same centred compose modal as analysis and Communications (see [Communications compose](#)). Use the **Email** or **WhatsApp** toggle: email pre-fills **Email address** and an AI-drafted message (including your signature); WhatsApp pre-fills **Mobile number** and a structured message with a **Hi [first name]** greeting, blank lines between paragraphs, the secure online link on its own line, and a note that PDF copies follow. You can edit the WhatsApp text before sending. You can always open the WhatsApp tab to review the message and attachments; if WhatsApp is not configured for your brokerage, a note appears and **Send via WhatsApp** stays disabled until Chatflow is set up. The email and WhatsApp message include a **secure online link** as the primary way for the client to complete their forms (PDF attachments remain optional for their records). On that link, the client switches between forms using the tabs at the top; progress is saved when they move to another form or edit fields, so multiple forms can be completed over more than one visit. Each form includes a required **Sign and date** section at the bottom — the client draws their signature with a finger on mobile or with a mouse or trackpad on a computer, confirms their full name, and the date is captured automatically; all forms must be signed before **Submit all forms**. When you **Review** a completed form in Client activity, the client's signature and date appear on the document preview and in print/PDF export. The review modal also shows an optional **Sign** button (between Close and Print) so you can add your own adviser signature - draw it in the pad, confirm your name, and click **Apply signature** to stamp it into the **Adviser Signature** column of the form. The adviser signature is saved to the analysis history, so reopening the same run from History still shows it on Review and in Print / Save as PDF / File. Signing is optional - you can file the form to the client record without an adviser signature. Below the message, the **Attachments** strip lists each selected form as a PDF chip (e.g. Record of Advice, Proposal Form). Tick what to include on email; on WhatsApp, the intro message carries the secure online link and each checked form follows as its own PDF message. Use **View** on any chip to open it in a named browser tab (same tab is reused if you view that attachment again). Edit as needed, then **Send to Client** or **Send via WhatsApp**. Email delivers via Alert delivery; WhatsApp via Chatflow. Fields the client must complete are marked **CLIENT** (grey sections with white boxes) — not amber. After a successful send, a slim teal confirmation appears **above the form**, and a **Client activity** panel opens on the right. It starts at **Sent — awaiting client** (0%) and updates only when the client uses the secure link: **Client opened the link** (~33%), **Client started completing the form** (~66%)

after their first save), and **Client submitted all forms** (100%). Milestones stay grey until each step really happens — the panel does not auto-complete on its own. When the client has submitted everything, the same panel adds **Client Submission Received** with **Review** (opens the same centred document preview as analysis output — read-only, with Print and Save as PDF), **Print**, and **File All to Client Record**; after filing, a short **filed** confirmation stays in the panel until you dismiss it with **x**. Use the shared **Back** bar (above the client profile) to return to the form editor with edits and progress saved; click **Form Pre-fill** in the breadcrumb trail to go Home to the workbench.

12. **Branding scope.** Website or CI-guide branding changes the generated Smart Form and document presentation only. Broker Portal actions, including **Send to Client**, remain teal. The client's secure form link uses the same brand colours and font as the form editor — section headings, pre-filled highlights, the header band, and the **Submit all forms** button all follow the applied branding. The **page header** of the secure client link also reflects your branding: when branding is on and a logo is available it shows your broker logo (title stays "Insurance forms"); if there is no logo, the header title shows your brand name when one is set, otherwise "Insurance forms" — no Cardinal or platform mark is ever shown.
13. **Client files** lists analyses by client with audit trail and reopen.

Guided tour & tooltips

The first time you open the workbench, the **step-by-step guide** starts automatically and spotlights each part of the workflow — the client & documents card and the analysis-type checklist. Step through it with **Next** / **Back**, or **Skip** it. It auto-starts only once; re-open it any time with the list-check icon (see below).

Step-by-step guide (in-app)

Any time you need a guided walkthrough, click the **list-check** icon (📋) in the Smart Tools hub header, in the **Client & documents** card header on the workbench upload screen, in the **Form Pre-fill** header, or in the Smart Tools top bar on other workbench views. Hover the icon for the tooltip *Step-by-step guide — Smart Tools*. The tour adapts to the **screen you are on** — it only walks steps relevant to that stage. On the **hub** it explains each analysis tile. On **upload** it covers client & documents and analysis types. **Form Pre-fill** has its own stages: upload & extract, select forms (ROA, FNA, claims, and more) after extraction, then review tabs and **Send to client**. While analyses are **running** it explains the status line. On **results** it covers review, tabs, and **Send to client**. On **Output** it walks broker notes, documents, and email templates. On **Client Files** it explains history and review. Use **Next** and **Back** to move through the tour.

- The next action to take is always emphasised — for example **Start** lights up once you have selected documents — so the path forward is obvious.
 - Hover (or keyboard-focus) any **icon-only button** — the agent's mic, history and new-chat controls, the file refresh, the client-gate badge — for a tooltip that explains what it does.
-

Screenshot: brokerlens-guided-tour

Run `npm run screenshots:capture`, then `npm run screenshots:embed`

The first-run guided tour spotlighting a step of the workbench. User guide help is in the C360 action bar above the module header.

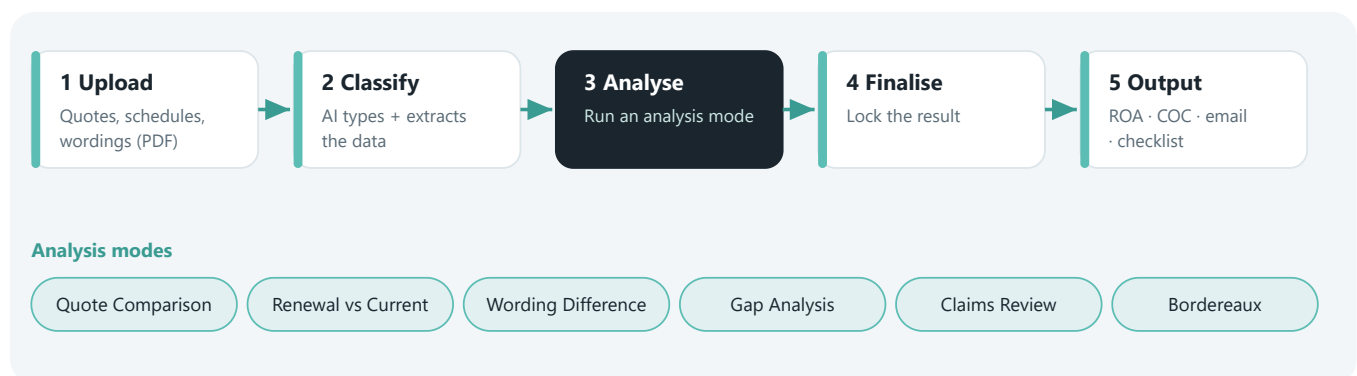
Smart Tools AI (Dot)

Open **Dot** — the chat launcher available everywhere in the portal (bottom-right) — to drive Smart Tools by conversation. With a client and documents selected on the Smart Tools workbench, describe what you need in plain language — for example *"compare these quotes and recommend one"*, *"what changed in this renewal?"* or *"draft a client email about this"* — and Dot picks the right tool and runs it on your selected documents. The standalone Ask Agent tab, chat rail and floating button have been retired; Dot now covers the same ground portal-wide, and also answers how-to questions about the rest of the portal.

- **Suggestions:** tap a starter chip to begin — the suggestions adapt to the documents you have selected.
- **Voice:** tap the microphone to dictate (where your browser supports it); your words fill the box so you can edit before sending.
- **It shows its work:** each step appears as a card (for example "Quote Comparison complete") and results render in the workbench, just like the manual flow.
- **You stay in control:** when the agent drafts an email, choose **Review & send** to open the Communications-style compose modal and confirm before delivery. Creating a task or saving a document also asks you to confirm first — the agent never sends or files anything on its own.
- **History:** use the clock icon to reopen a previous conversation for the current client. The plus icon starts a fresh chat.

Analysis modes & outputs

The workbench runs a **suite of AI analysis types** (Quote Comparison, Renewal, Wording Difference, Gap, Claims, Bordereaux and Life Cover — your brokerage's entitlements decide which appear) over a client's documents — each producing a structured, FAIS-aware result you finalise into output documents (an ROA, a [Confirmation of Cover](#), client emails and a compliance checklist). **Quote Comparison** uses a deterministic merge engine for the side-by-side table; the rest use the BrokerLens AI engine.



1. Select a client and add their documents (Steps 1–2 of the [Smart Tools workbench](#)).
2. Choose an analysis type (or open the **Quote Comparison** tile from **Smart Tools**), then **run**. On the Analyse step, **Back** and breadcrumbs (**Smart Tools** → **Quote Comparison**) sit directly under the Smart Tools header; when a client is linked, their profile appears in a bar below that, matching Communications quote comparison. The quote comparison card header shows the title and **New Comparison** (clears the workflow and returns to document upload); open client documents from the **Client Files** tab in the Smart Tools header (not a separate button on this screen). Below that: analysis summary (mode, document count, draft status), and status pills (**Responded**, **Docs**). Use **Back** to return to the Documents step (progress is saved when applicable). Use the in-table **Quick** / **Standard** / **Full Drill-Down** pills (**Quick** is selected by default for faster results; switch to **Standard** or **Full Drill-Down** after results load for deeper AI scoring and a full recommendation; starting a New Comparison resets to Quick) (cumulative row counts) and the comparison legend (best values are highlighted in teal in the table—no separate **Best** column). Click **AI Analysis** in the toolbar (wand icon, beside **Add Insurer**) to slide open a right-hand drawer with the AI recommendation, the **Full analysis** expander, broker alerts, and the actions (**Generate Record of Advice**, **Email Comparison to Client**, **Export PDF**, **Save Draft**). Click **Source Documents** (next to it; the badge shows the document count) for a matching drawer listing every PDF used for the analysis (filename, document type, source, and a teal **view** icon to

open the file). Both drawers use the same layout as the [Insights](#) records drawer—a navy header with breadcrumb, title and count, and a footer **Close** button; close with the ×, **Close**, the darkened background, or **Esc**. Emails and signing links sent to the client are built from the saved analysis data, so the recommendation is still included even though it opens in a drawer.

3. For other analysis types (Renewal, Wording Difference, Gap, Claims, Bordereaux), the Analyse step uses the same aligned comparison layout: a fixed **Attribute** column and equal-width insurer columns with name and reference in the header. The best value per row is highlighted in teal (see the **Best value** legend item) instead of a separate column. When you open a tile such as **Renewal Analysis, Back** and breadcrumbs (**Smart Tools** → **Renewal Analysis**) appear in the same bar under the Smart Tools header as Quote Comparison; use **Back** to return to document selection. On **Renewal Analysis**, use **+ Current Policy** the same way as Quote Comparison: import a policy schedule PDF or pick an active C360 policy; it appears as a purple **Current** baseline column and the analysis re-runs as Renewal (not Quote Comparison).
4. Review the editable comparison table and AI recommendation. Use **Add Insurer** (Quote Comparison) to open the add-insurer modal: upload a quote PDF (AI extraction preview and column colour picker), then confirm with **Add to Comparison**. Use **Current Policy** (Quote Comparison and Renewal Analysis) to open the import modal: upload a policy schedule PDF (AI extraction preview) or, when a client is linked, pick an active policy from C360. Confirm with **Add as Current Policy**; use **Remove current policy** to clear it. The button stays highlighted while the Current column is shown. Edits auto-save to your Smart Tools history.
5. On the Output step (after **Send to Client** from analyse), the Step 1 client profile, C360 **Back** bar, and breadcrumbs (**Smart Tools** > analysis type) match the analyse and Form Pre-fill screens — **Back** returns to the analysis view. Use **Save Draft, Send to Client** (completes the analysis and opens the **Analysis Complete** screen, where you can add notes and pick attachments before you press **Compose**; it does not open the email by itself), **Email Comparison to Client** in the **AI Analysis** drawer (completes the analysis and opens the client email straight away; the compose modal includes an **Attachments** strip with completed analysis PDFs; when the analysis has a comparison table, tick **Include as Excel** beside the label to add the workbook), **Generate Record of Advice**, or **Export PDF** on the Analyse step to download the full comparison table as a PDF to your computer (choose Desktop, Documents, or another folder in the save dialog), or continue to the Output view for ROA, Confirmation of Cover, smart emails, checklist, and the comparison Excel (**Cover Comparison Table**). When sending by **WhatsApp**, the compose box shows numbered findings and warnings as separate paragraphs so you can edit them easily. On send, Chatflow requires a single-line body (OASIS cannot carry newlines), so those paragraphs are joined with a “|” separator while secure signing links stay intact and tappable. The selected

analysis PDF is sent as a WhatsApp document during an active client conversation; if Chatflow must use its text-only generic template, the same message contains a labelled, tappable PDF download link instead so the document is not silently omitted. Quote Comparison in Smart Tools is standalone (no workbench task required). From the Record of Advice preview, use **Save as PDF** or **Save to Client Documents** (requires a linked client).

6. **WhatsApp message length.** On the WhatsApp tab a count under the message shows how many characters you have. If the client hasn't messaged your WhatsApp number in the last 24 hours, WhatsApp only allows about 850 characters, and the count turns amber when you go over. The portal then shortens the summary automatically: the signing link and the PDF download link are always kept in full, and the confirmation says the message was shortened. Bullets, long dashes and curly quotes are sent as plain characters, and emojis are left out, because WhatsApp would otherwise show them garbled.

Screenshot: brokerlens-analysis-comparison

Run `npm run screenshots:capture`, then `npm run screenshots:embed`

A live Quote Comparison — Santam vs Hollard across premium, excesses and sums insured, with an AI recommendation panel.

New Analysis runs in the background — starting it no longer locks you into the results screen. While a single-mode analysis runs, a light centered panel replaces the results view (no filled card): it shows your chosen **Dot the Bot** companion with a gentle bob (or a soft teal spinner if Dot is off), a short status title and detail for the active step (for example *Starting analysis*, then *Reading your documents*), and a single row of progress dots — completed steps pop in with a check, the active step shows a spinning orbit, and later steps stay empty. Dot shows a short speech bubble that updates with the phase (*Reading*, *Comparing*, *Almost there*). You can navigate to any other Smart Tools card or sidebar item while this runs — the analysis keeps going on the server, and it survives closing the browser or reloading the page; come back to this screen, or reopen it from your analysis history, to see live progress or the finished result. A quiet elapsed timer and **Cancel** link are shown

(best-effort: it flags the run to stop before its next step rather than interrupting an AI call already in progress). The same panel is used for renewal, wording, gap, claims, bordereaux and life analyses, with mode-specific status wording; running several analysis types at once from the workbench's multi-select still analyses them one after another on this screen rather than in the background. If it fails, an inline message with a **Retry** button replaces the table instead of a blank screen. On every analysis type, after results load, **Quick** / **Standard** / **Full Drill-Down** toggles stay available above the table; contextual help for the active level appears directly under those toggles. In **Quick Compare**, the **AI Analysis** drawer shows a light pick derived from the comparison table (no confidence score) — switch to **Standard** for full FAIS-aware scoring and rationale.

When an analysis finishes, fails, or is cancelled while you're elsewhere in the portal, you're told three ways: a brief toast if the app is open, an entry in the **notification bell** (top navigation bar) you can click to jump straight back to the result, and — if enabled — a browser notification even when the portal tab isn't focused. Open the bell panel and use the **Notify me in-browser when background jobs finish** switch at the top to turn browser notifications on (your browser will ask you to allow them the first time) or off; if your browser has blocked notifications, a short hint appears under the switch explaining how to re-enable them in your browser's site settings.

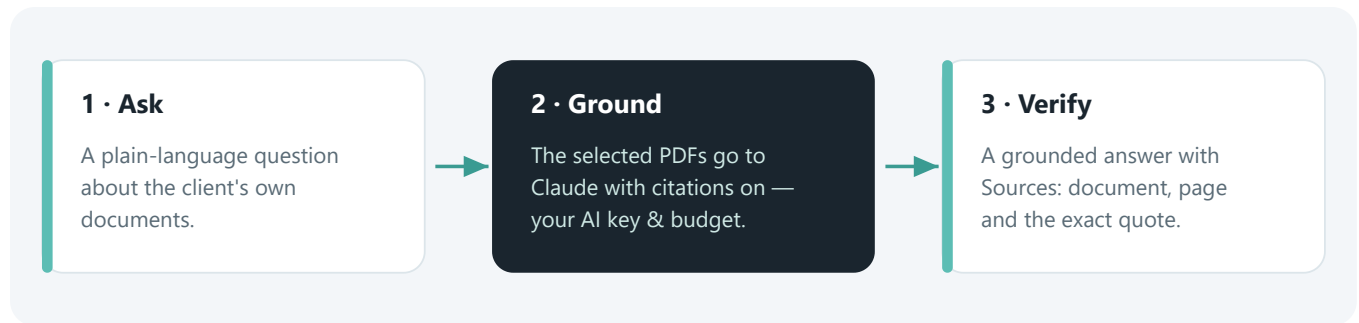
Screenshot: brokerlens-staged-progress

Run `npm run screenshots:capture`, then `npm run screenshots:embed`

Live staged progress during an analysis — the current step, elapsed time and a Cancel button, over placeholder rows.

Document Advisor (cited answers)

Ask plain-language questions about a client's documents and get answers **grounded in the actual policy wording**. Every answer comes with **Sources** — the document, page and exact quoted passage — so you can verify it rather than trust a black box. It is surfaced through [Dot](#).



1. Select a client and add or upload their documents (Steps 1–2 of the [Smart Tools workbench](#)).
2. Open **Dot** (the chat launcher, bottom-right) and ask a factual question, e.g. *"What is the geyser excess, and is accidental damage covered?"*
3. The agent reads the selected PDFs and replies with a grounded answer plus a **Sources** list.
4. Each Source shows the document, page and the quoted passage. **Click a Source** to open it in the [Document viewer](#) at that page with the passage highlighted.

Screenshot: brokerlens-document-advisor

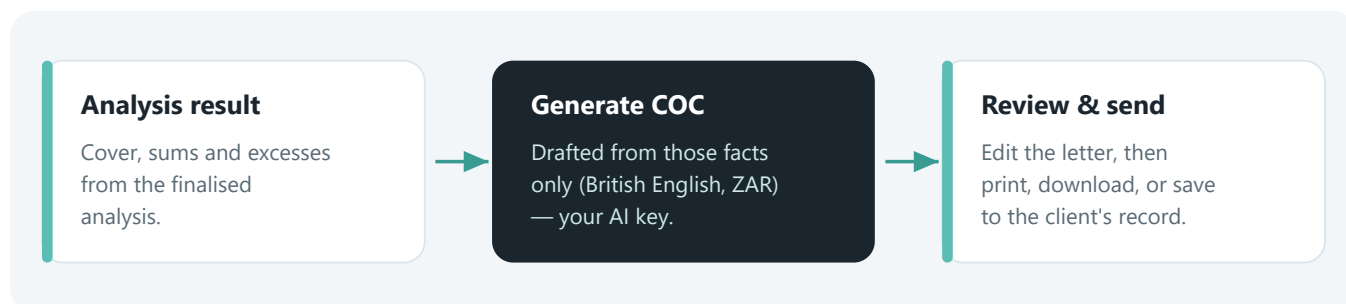
Run `npm run screenshots:capture`, then `npm run screenshots:embed`

*A cited answer in Ask Agent — the geyser excess and accidental-damage cover, with a clickable **Sources** citation that opens the document.*

Answers use **only** the documents in the current session — the Advisor will say when something isn't in the documents rather than invent cover. It uses your brokerage's AI key and budget ([Settings → AI configuration](#)).

Confirmation of Cover

Generate a **Confirmation of Cover (COC)** letter straight from an analysis. It is drafted from the facts in the result — in British English and ZAR — ready for you to review, edit, print or save to the client.



1. Run an analysis and **Finalise** to the output view.
2. Under **Documents & reports**, choose **Generate “Confirmation of Cover”**.
3. Review and edit the draft. It uses only the facts present in the analysis — confirm cover, sums insured and excesses before sending.
4. **Print, download, or Save** it to the client's record.

Screenshot: brokerlens-confirmation-of-cover

Run `npm run screenshots:capture`, then `npm run screenshots:embed`

A generated Confirmation of Cover — drafted only from the analysis result (here the Hollard quote for client Veale), ready to review, print or save.

Like the other AI features, COC generation uses your brokerage's AI key and counts towards its budget ([Settings](#) → [AI configuration](#)).

Generated documents

After an analysis, the **Output** view offers a suite of AI-drafted documents you can generate, preview, edit, sign, download and email. Each is grounded in the analysis and the client's details, in British English and ZAR, and is saved against the client's history.

- **Record of Advice (ROA)** — pick the variant that fits the engagement: *Renewal*, *Personal lines*, *Commercial*, *Replacement* or *Life replacement*. Switch variants from the picker; each generated variant is cached, so switching back is instant.
- **Confirmation of Cover** — see [Confirmation of Cover](#).
- **Financial Needs Analysis (FNA)** — a structured needs summary drawn from the analysis and your notes.
- **Client Minutes** — meeting minutes drafted from your broker notes and the comparison.
- **Email drafts** — ready-to-edit emails: a recommendation *to the client*, a placement instruction *to the winning insurer*, and a regret note *to the unsuccessful insurer*. Adjust the subject and body before sending.
- **Client onboarding packs** — *Life* and *Investment* onboarding packs for new advice engagements.

Sign & send. When you generate or open a document, the preview opens in a centred modal over the page (same pattern as Communications compose). Documents that need a signature (for example the Confirmation of Cover or an ROA) can be signed in-portal with the **signature pad** — draw the signature and it is embedded with the signatory and timestamp. Then download, print, or email the finished document.

Branding

Smart Tools prints your brokerage's own look on every client-facing PDF — logo, colours and a footer with your trading details. It is set up **once per brokerage** and then used automatically for every user, every time.

1. Open it from either door: [Settings](#) → **Smart Tools Branding**, or **Smart Tools** → **Form Pre-fill** → **Branding**. Both show and save the same profile.

2. **Logo** — upload a PNG or JPG up to 2 MB, or fetch colours automatically from your website or a CI guide document instead. The logo shows in its true shape, and the **Fetch** and **Preview sample PDF** buttons keep their size while they are busy.
3. **Colours** — set a primary and secondary colour used for headings, rules and table headers in the PDF.
4. **Footer details** — fill in trading name, FSP number, phone and email; they print together in the footer of every PDF.
5. **Disclaimer** — the portal pre-fills sensible default wording; edit it to suit your brokerage, or use **Reset to default wording** to restore it.
6. Click **Preview sample PDF** to see the header, footer and colours applied to a sample comparison before you commit.
7. Click **Save as default**. From then on, every user at your brokerage sees this branding, with no further setup.

Branding applies to the PDFs generated by **Quote Comparison, Renewal Analysis, Wording Difference, Gap Analysis, Claims Review** and **Bordereaux** — however the client receives it: emailed, sent by WhatsApp, printed, or opened from a signing link. The **Record of Advice** document has its own separate branded layout and is not affected here.

A brokerage that has not set up branding yet keeps today's plain header — nothing changes until you save a profile.

What the client PDF looks like. Every comparison-style PDF opens with an **At a glance** band — the recommended insurer with its premium, the alternatives with their price difference, and a one-line saving — so the client sees the answer before the detail. A **legend** above the tables explains the markings: green means *best value*, amber means *needs attention*, and a plain grey dash means *not offered or not applicable* (dashes are never highlighted). Each insurer column is headed by a coloured **monogram** matching the on-screen Quick Compare colours, with quotes labelled A, B, C...; comparisons of more than three insurers continue on the next page with the attribute column repeated. Money amounts print in one consistent format (e.g. **R 1 245.00 /month**). The recommendation prints as its own card at the end, and **Gap Analysis** shows a verdict band followed by a “where each insurer falls short” card per insurer. Downloaded and emailed PDFs carry a footer band on **every page** with your trading details on the left and **Page X of Y** on the right.

Tip

On the Results screen, tick **Include in client documents (PDF and Excel) as “Notes from your broker”** under Reason for recommendation to print the reason and client discussion points in the client-facing PDF and Excel export as well as the Record of Advice.

Your signature

Unlike the brokerage logo and colours above, your signature is set up **once per user** — from [Settings](#) → **Smart Tools Branding**, under **Your signature**: your full name, title, and a signature drawn on the pad or uploaded as a PNG. Once saved, it is stamped automatically on every client-facing document you send — every analysis PDF, the on-screen **View**, and **Export Excel** — for every route (email, WhatsApp, download, print, or a signing link).

It never blocks a send: if you have not saved a signature yet, documents simply go out unsigned, with a reminder link on the Results screen. Clicking **Sign** in the document **View** modal still works as before and overrides the auto-applied signature — use it when someone else needs to sign a particular document.

Export Excel is now available directly on the Results screen next to Download PDF, as well as on the AI Analysis screen — no need to go back and forth. For the Excel files offered in **Send to client**, see [Send to client: PDF and Excel options](#); for the PDF header, footer and green best-value markings, see [How analysis PDFs look](#).

Sending, signing and branded PDFs

How an analysis leaves the portal as a branded PDF (and Excel file), what the client sees on the signing link, and what comes back when they sign or decline.

How analysis PDFs look

- Every analysis PDF has your branded **header and footer**.
- **Best-value amounts** show in green with a tick.
- Pages break **between** table rows, so a row is never cut in half across two pages.
- PDFs sent by email, WhatsApp or for signing are sharp — they are no longer reduced in quality. Only a very large PDF is reduced in picture quality so that it fits.

Send to client: PDF and Excel options

- **Send to client** offers **one PDF option and one Excel option** for each completed analysis.
- The Excel options start **unticked**; tick the ones you want to send. Your ticks stay in place while the email is being prepared.
- Each Excel file is named after its analysis (for example **Renewal_Analysis.xlsx**) and contains that analysis's own data.
- **Policy Gap Analysis** now has an Excel file too. It lists only the rows where an insurer falls short.

- **WhatsApp message length.** See [WhatsApp message length](#) for how long WhatsApp messages are shortened.

What the client sees on the signing link

The client opens the link without logging in. The page carries your **logo and trading name** in the header and a step guide: **Review the document** → **Choose your option** → **Sign**. The *Choose your option* step only appears for a **Quote Comparison**.

- When several analyses are in one link, each has its own **document tab**. **Open full screen** shows the document larger.
- With **one** document the sign button reads **Sign and send to my broker**. With **several** documents it reads **Sign this document**, then **Next analysis** moves on, and **Submit all** sends everything once every document has been answered.
- Each document can be signed or declined **on its own**. To decline, the client selects **I want to decline instead**, gives a reason, then selects **Confirm decline**. After a decline the client is taken to the next document.
- Your contact line (how to reach you) shows at the bottom of the page. On a phone the sign button stays fixed at the bottom of the screen.
- The final page says **Signatures submitted**, **Responses submitted** or **Decline submitted**. The client cannot download the document from this page.

The signed PDF

Select **View signed PDF** to open it. Its last page is titled **Client choice and signature** and shows:

- A **CLIENT SELECTED** card with the insurer, monthly premium, basic excess and the number of quotes compared. If the client chose something other than your recommendation, a **Not the broker's recommendation** tag appears.
- A table of all the quotes compared, with the one **Chosen** and the one **Recommended** marked.
- The declaration text, then the signature with the client's name and the signed date and time (SAST), with **Electronic signature, secure link** underneath.
- An audit line: the document, the signing reference, who it was sent to and the device used.
- For an analysis where the client has no choice to make, the card reads **CLIENT ACCEPTED** instead.

When the client declines

- A completed PDF is still produced. Its last page is titled **Client response: declined** and shows the reason the client gave, or **No reason was given**.

- It is saved to the client's documents as **<title> - declined by <name>.pdf**.
- In Smart Tools the declined chip offers **View reason** (who declined, when, and the reason) and **View declined PDF**.

After the client signs

- The Results screen shows a chip for each document, with **View signed PDF** on the signed ones.
- The teal **Send signed copy to client** button opens **Send to client** with the signed PDF(s) already ticked. Nothing is sent until you press **Send**; the client is not emailed automatically.
- The bell notification for a signed or declined analysis opens that analysis.

Form Pre-fill: the client's link and form PDFs

- The client's link and the form PDFs use the same header as the portal: a white card with a coloured edge (teal by default, your brand colour when branding is on), your logo, trading name, the form name, a description and a **CLIENT** strip.
 - The client's form shows **Form X of N** and **<n> of <total> required fields done**, with an error message under each field that needs attention. Text is larger on phones.
 - A declaration tick must be ticked before **Submit all forms** can be used.
 - If a link has expired, the client sees a friendly page instead of the form.
-

Document extract cache

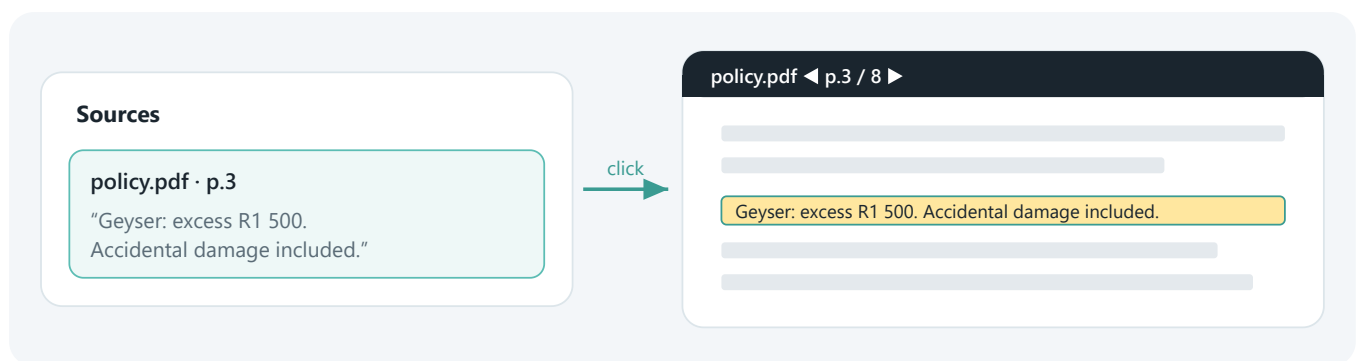
When you upload or + **Include** a PDF for a client that was already extracted for that client, Smart Tools reuses the cached extract instead of calling AI again for classification. This saves AI credits on the upload step; running analysis or form generation still uses AI as usual.

- When a document was read before for this client, Smart Tools reuses that read automatically (a brief toast only — no badge on the row).
- Each document shows its **type** in the subtitle (e.g. Insurer Quote · Uploaded). Click the row to change the document type if needed.
- If the PDF changed, remove the document and upload or include it again to force a fresh read.

- Cache is keyed by the client plus the document identity (C360 **StorageGUID** for EDS files, or your upload storage key for computer uploads).

Document viewer

Open any document inside Smart Tools — uploaded this session or stored on the client (EDS) — without leaving the workbench. All pages appear in one scrollable view; use the header arrows or page number to jump to a page, zoom in or out, and download. Best of all: from a [Document Advisor](#) citation, the viewer jumps straight to the cited page and **highlights the exact passage**.



1. Click the **eye / View** control on a document — on an ingested card after upload, or on a client's stored document — to open it.
2. Or click a **Source** under a Document Advisor answer to open the document at that page with the quoted passage highlighted.
3. Navigate with ◀ ▶ (or the arrow keys) and the page box; **zoom** in/out; **Download** saves a copy. Press **Esc** or **X** to close.

Screenshot: brokerlens-document-viewer

Run `npm run screenshots:capture`, then `npm run screenshots:embed`

A Document Advisor citation opened the policy at the cited page, with the geyser excess passage highlighted for verification.

If the viewer can't pinpoint a quoted passage exactly (wording or spacing differences), it still opens the right page — just without the highlight.

Smart-tool entitlements

Each brokerage is enabled for a specific set of Smart Tools. Tools that aren't enabled are **hidden from the workbench and blocked in the backend**, so brokers only see what they're licensed to use.

1. Platform admins manage entitlements for their own brokerage in [Settings → AI configuration](#) → **Smart Tools entitlements** — there is no brokerage picker, so one broker can never view or change another broker's entitlements from this screen.
2. If a tool is disabled it won't appear on the **Smart Tools** hub or in the analysis-type list, and its route is redirected.
3. Manageable tools: **Quote Comparison, Renewal Analysis, Wording Difference, Gap Analysis, Claims, Bordereaux**, and **Form Pre-fill**.

Leaving entitlements unset enables all tools (the default). Set them to grant your brokerage a tailored toolset.

Prospect Intake workflow

Use the **Prospect Intake** workflow to collect a prospect's details securely, record the broker's approval, complete client onboarding in C360, and then open Quote Request v2 for the linked client.

Starting a Prospect Intake task

1. Go to **Tasks** and click **New Task**.
2. Select intent **Prospect Intake** from the list.
3. Add a task subject (e.g. the prospect's name) and save.

Step 1 — Send intake form

1. Open the task. The portal provisions a single-use invitation that expires after 72 hours before opening the composer.
2. Click **Send link to prospect**. If the invitation cannot be created, the composer is withheld and nothing is sent.
3. The prospect receives the link and opens the form in their browser (no login required).
4. Once the prospect submits, the step detects the response and turns green.

Security note

The link contains a random opaque invitation token. The server checks its form, task, expiry, and replay state before accepting the response. Invalid, expired, and replayed links are rejected. The public form never writes directly to C360.

Step 2 — Review submission

1. Open Step 2. All submitted fields are displayed in read-only, escaped format.
2. Review the prospect's details: name, ID/registration number, email, mobile, product interest, and preferred contact channel.
3. Confirm that **POPIA processing consent** is shown as given (green badge). If consent is missing the Approve button remains disabled — you cannot approve without it.
4. Click **Approve lead**. The portal writes the durable approval audit first. If that write fails, no Approved state is saved.
5. Click **Complete client onboarding** to open the canonical Create Lead flow with the submitted details prefilled.

6. The task is linked only after C360 returns a real Client Entity GUID.
7. To decline, click **Reject** and confirm. The submission is logged as rejected.

POPIA requirement

You must not onboard a prospect in C360 without their explicit POPIA processing consent. The Approve button is intentionally disabled when consent was not given on the form.

Step 3 — Notify prospect

1. Send an acknowledgement to the prospect confirming you have received their details and will be in touch.
2. Use the default message or customise the subject/body before sending.

Step 4 — Start quote request

1. **Start Quote Request v2** remains disabled until the task has a real C360 Client Entity GUID.
2. Click it to open the existing New Task flow prefilled with the linked client and Quote Request v2 workflow.

Security model

The public link contains an opaque, single-use invitation token and no broker GUID. The server validates the token, form, task, expiry, and replay state before inserting the response, then consumes the token in the same transaction. Only that token-bound response appears in broker review. C360 onboarding runs later in the authenticated canonical Create Lead flow.

Feedback & Issues

The **Feedback & Issues** register is a broker-scoped log for defects, enhancements, new-feature requests, and general feedback. Use the **?** help link on the page toolbar for this section. Open the screen from the sidebar — the **Feedback & Issues (Navigation)** permission is enabled by default for all roles (you can turn it off per role under **Settings → User Roles → Permissions**).

1. Open **Feedback & Issues** from the sidebar or section tabs.
2. Click **Submit feedback** to log a defect, enhancement, new-feature request, or other feedback. The system assigns a feedback number (**FI-0001**, ...) per brokerage. Choose the portal **area**, **severity**, and add optional description, steps to reproduce (defects), or business

benefit (enhancements/features). Attach up to five files: images or PDFs (10 MB each), or video (MP4, WebM, MOV up to 50 MB).

3. Use the **Type** filter buttons and **Severity** / **Status** dropdowns in the table header to narrow the list. Status includes **Open**, **In progress**, and **Resolved**.
4. From the row ... actions menu: **View** and **Delete** are available for every item; **Edit** and **Resolve** appear only while an item is open or in progress. On **View**, use **Add update** to post broker-visible progress notes. Resolving requires resolution notes (also recorded as a final update). Resolved items cannot be edited. Deleting shows the item title in the confirmation prompt.
5. New items are also queued to the Cardinal ClickUp Backlog for internal triage. Sync status may show on the row; use **Open in ClickUp** or **Retry ClickUp sync** when available. When the linked ClickUp task is moved to **Complete** with a resolution comment, that note is pulled back into the portal as resolution notes (and an Updates entry).
6. Unread ClickUp resolutions show a count on **Feedback & Issues** in the sidebar/tabs and in the top-bar bell. Open the item (or use **Mark all read** in Notifications) to clear the unread state. Rows with a new update are highlighted until you view them. Click anywhere on a row to open it.
7. When an item you submitted is resolved (from ClickUp or in the portal), you also receive an email with the resolution notes and a link back to Feedback & Issues.
8. Click **Export Excel** to download the full register for your brokerage.

Broker scope

Each brokerage only sees its own issues. Data is stored against your signed-in broker context.

Learning Centre

The **Learning Centre** is your brokerage's training hub: short walkthroughs for getting started and common workflows, a searchable glossary, and links to the user guide, module PDFs, and the full training video library. Open it from the **Learning** item in the sidebar (or the **Learning** tab on the sign-in page before you authenticate). Administrators customise content under [Settings](#) → **Training Config**.

1. On the sign-in page, open the **Learning** tab to preview the first three getting-started videos (Sign in & Home, Tasks & Calendar, Communications) before you sign in. Switch each clip between **Web** (16:9) and **Mobile** (9:16) as needed.

2. After sign-in, open **Learning** from the sidebar or top navigation.
3. In **Video walkthroughs**, pick a tab: **Getting started** (sign-in through Smart Tools, including quote comparison), **Common workflows** (for example cross-border letter, confirmation of cover, register a claim, claims, renewals, Insights and Portal Assistant) or **Admin & setup** (AI Configuration, Training Config, Settings hub, email intents, document and form configuration, audit trail, and first-time brokerage setup). Each tab shows how many videos it holds, and the total appears next to the section title. A **More videos** tab appears only if your brokerage has added videos of its own that are not in one of those groups.
4. Type in **Search videos** (for example *claim*) to search the titles and descriptions of all videos at once. While you search, no tab is selected, the heading shows how many results were found across all tabs, and each result carries a small label naming the tab it belongs to. Clear the box to return to the tab you were on.
5. Select a video card to play it in a pop-up player. Use the **Mobile / Web** switch at the top right to change between the 9:16 and 16:9 versions, and close the player with **×**, the **Esc** key, or by clicking outside it. Underneath the video you can see its length and a clickable **Next: ...** link that opens the next video in the same list (the current tab or your search results).
6. New training videos released for the Broker Portal are added to your list automatically, even if your brokerage has customised its video list in **Settings → Training Config**. A video that your administrator has deliberately removed stays removed.
7. Use the glossary search when you need a portal term explained.
8. Use **More help** for the full user guide, PDF download, module training booklets, or the external **Training video library** (rollout pack and share links).

Use Case Journeys

The **Use Case Journeys** section in the Learning Centre provides step-by-step in-app walkthroughs of real-life brokerage scenarios. Each step highlights the exact control on screen (sidebar item, action-bar button, or Smart Tools tile) before you continue. Journeys are grouped by category: Daily work, Find and serve clients, New business, Renewals and policies, Claims, Communications, Smart Tools and AI, and Settings and feedback.

- **Daily work** – Home quick actions, Tasks, Calendar, Insights, and the morning control circuit.
- **Find and serve clients** – Global search and Client 360 tabs.
- **New business** – Prospect to policy (bind step demo-stubbed), capture lead, Leads book, Quotes book.
- **Renewals and policies** – Renewals book, Policies lookup, AI renewal analysis, schedule and confirmation-of-cover workflows.

- **Claims** – FNOL from + Claim, full claim wizards, and Claims book follow-up.
- **Communications** – Inbound service, compose, WhatsApp, and complaint workflow.
- **Smart Tools and AI** – Hub tour, BrokerLens, quote comparison, Smart Forms.
- **Settings and feedback** – Settings hub, AI Configuration, Feedback & Issues.

Journey progress is saved locally and synchronised to the database when available. Use **Resume** to continue where you left off, or **Replay** to start again.

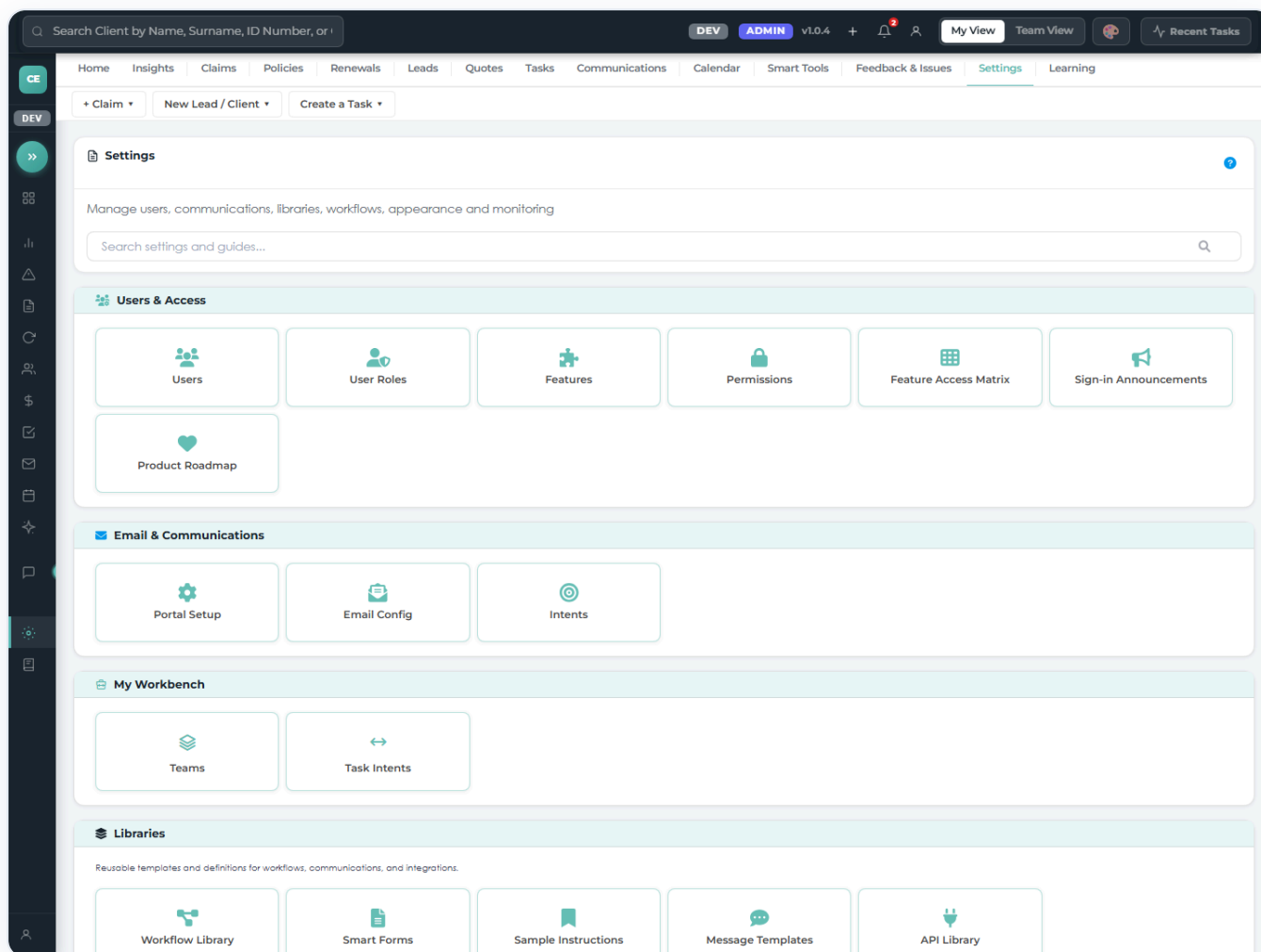
Screenshot: learning-centre-journeys

Run `npm run screenshots:capture`, then `npm run screenshots:embed`

Settings hub

Settings is a searchable hub grouped by area: **Users & Access**, **Email & Communications**, **My Workbench** (teams and task intents), **Workflows & Automation** (actions, document types, Smart Forms, document library, workflows), **AI & Automation** (admin only — AI configuration: the Anthropic API key, model and budgets that power Smart Forms and Smart Tools — plus the platform-wide AI usage & cost report), **Appearance** (tags, CSS variables, partner branding, and [Choose your Dot](#)), **Monitoring** (audit trail), and **Integration & Mapping** where enabled. **Manage Email Accounts** now lives under **Email & Communications**. Tiles you cannot use are hidden by role. Sections where every tile is admin-only (for example **AI & Automation** and **Training**) show *Admin access required to configure these settings*. when you are not a broker admin. Brokerages with platform-admin capability also see a clickable **ADMIN** indicator next to the environment badge (top bar and profile menu). Selecting it opens the **Admin Hub** — a one-stop shop for admin-only features: **Sign-in Announcements** (the “What’s New / What’s Next” panels on the sign-in page), **Brokers**, cross-broker

Email and **Action** configuration, **AI configuration & entitlements**, the **audit trail**, and the **QA Test Pack** (a tester reference — logins, sample policyholders and end-to-end test scenarios for the UAT environment, with policy data loaded live from C360). The top bar shows the portal version (for example **v1.0.0**) beside the environment and admin badges; hover for the full label (for example **Broker Portal 1.0.0**).



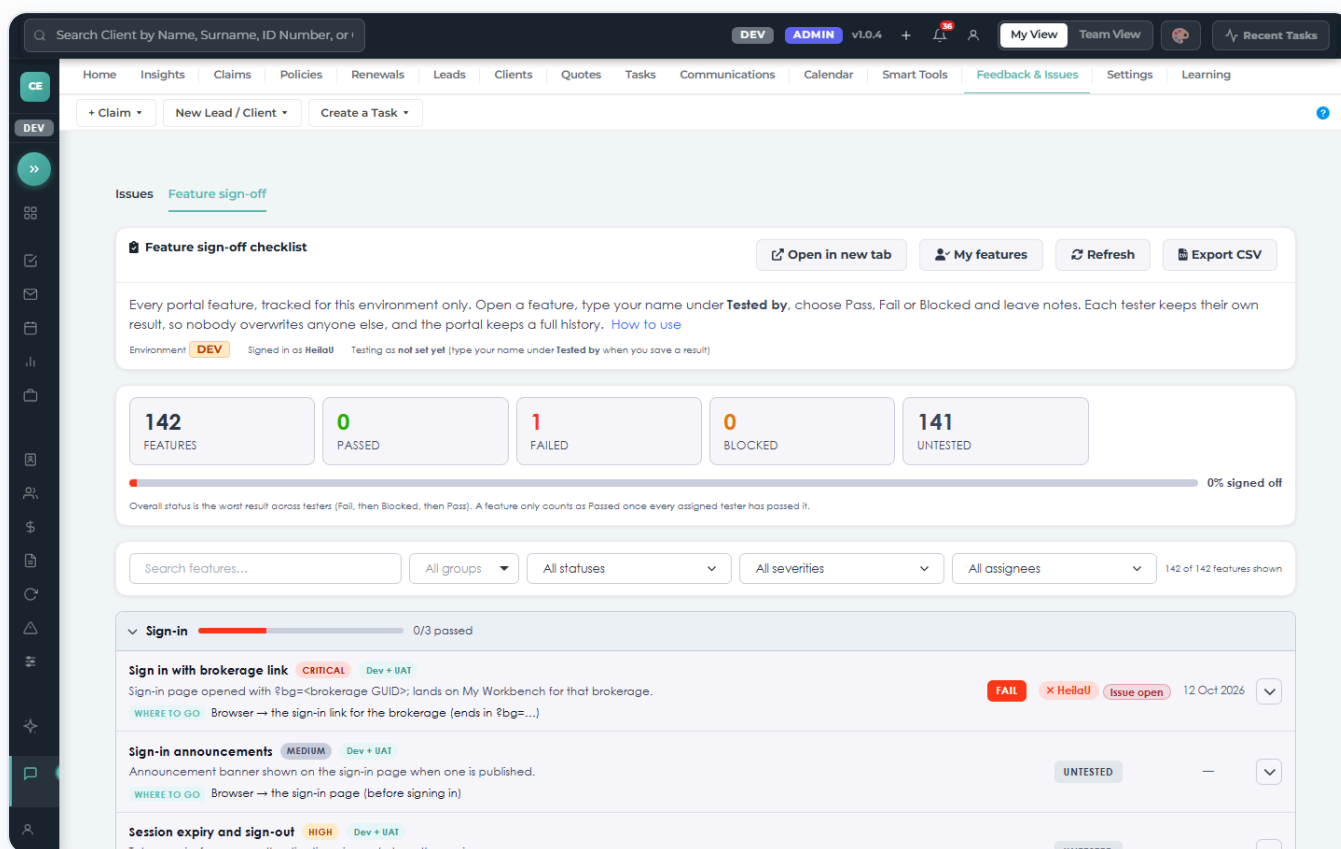
1. Open **Settings** from the sidebar or section tabs.
2. Use **Search settings and guides...** to find a tile quickly.
3. Select a tile to open that configuration screen; use breadcrumbs or the sidebar to return to the hub.

Note

Destructive changes (deletes, permission changes) may require confirmation — read the prompt before you confirm.

QA sign-off checklist (internal)

An internal tool for the Customapp test team. It lives on **Feedback & Issues** → **Feature sign-off** (the second tab, next to **Issues**; the Issues header with **Export Excel** and **Submit feedback** only shows on the Issues tab) and is hidden before brokers go live. The QA team is not set up as portal users, so every tester types their own name when they save a result: each name keeps its own result for every feature, and nobody overwrites anyone else. The old **Open checklist** button on the **QA Test Pack** page (card 7 - **Feature sign-off checklist**) and the old deep link `?bpRoute=qa-signoff` both take you to the new tab.



1. There are no Dev/UAT tabs to switch between — the checklist always records sign-offs for whichever environment you opened it on. Open it on Dev to sign off Dev features; open it on UAT to sign off UAT features. The header shows the current **Environment**, the login you are signed in as, and **Testing as**, which only displays the name you last typed under **Tested by** (see below). There is one place to type your name: the portal remembers it in your browser, so you only type it once, and it is also the name used by **Assign to me** and **My features**.
2. Every portal feature is its own row, grouped by area, with a **Where to go** line naming the screen to test it in. Each row shows the feature's **overall status** and one chip per tester with that tester's latest result (grey chips are assigned testers who have not tested yet).

3. The overall status is the **worst result across testers**: any Fail makes the row **Fail**, otherwise any Blocked makes it **Blocked**, otherwise it is **Pass**. If some assigned testers have passed and others have not tested yet, it shows **Partly passed** and counts as untested until everyone has passed. Hover a row where one tester passed and another failed to see that testers disagree, or use the **Needs attention (testers disagree)** status filter.
4. Select the row's chevron to expand it. On the left are the numbered **Test steps**, the **Expect** line that counts as a pass, and **Assigned to**, which lists the testers expected to test the feature. Select **Assign to me** to add the name you last used under **Tested by** (several testers can be assigned to one feature), or **Clear** to remove everyone. On the right is the **Add your result** box and the **History**.
5. In **Add your result**, type your name under **Tested by** (required, free text), check the **Date tested** (today by default; the portal also records the exact save time), choose **Pass**, **Fail** or **Blocked** (select the chosen button again to clear the choice), optionally add screenshots (paste with Ctrl+V, drag and drop, or **Add screenshot**, up to 5), type your **Notes** and select **Save result**. A Fail or Blocked needs a note of at least 5 characters; **Save result** stays disabled and the box tells you what is missing. Each save adds a new entry under your name and never changes anyone else's. Names are matched ignoring capital letters and extra spaces, so "Sam" and "sam " are the same tester.
6. **Clear my result** (shown once you have a result) records that your name no longer has a result for that feature. The **History** list shows every entry ever saved, newest first, with the tester, the date tested, the result, the note and any screenshots. It is read-only.
7. Use the search box and the **group**, **status**, **severity** and **assignee** dropdowns to narrow the list, and toggle **My features** to show only rows assigned to the name shown in **Testing as**. The totals and progress bar count every feature for the environment you are on; once anything is assigned to your name, a second line tracks your own assigned progress. **Refresh** re-reads everyone's latest results.
8. Select **Export CSV** to download the current environment's full list — overall status, every tester's result and date, assignees and the latest note — as a spreadsheet. **Open in new tab** opens the checklist on its own, without the portal menus.
9. Saving a **Fail** or **Blocked** files an issue in the **Issues** tab with your note and screenshots, which syncs to ClickUp just like an issue reported by hand. There is one shared issue per feature per environment: when another tester also fails or blocks the feature, an update is added to the same issue and a comment on its ClickUp task. A **Pass** only resolves the issue once nobody is still failing or blocking the feature; if someone still is, the issue stays open and a comment records who passed and who is still failing. The chip beside the testers shows **Issue open** or **Issue resolved** and links to Feedback & Issues.

10. Every row has a badge showing where the feature is available: **Dev + UAT**, **Dev + UAT (newer on Dev)**, or **Dev only**. Hover the badge for the reason. A Dev-only feature does not appear at all when the checklist is opened on UAT.

Note

If the sign-off storage has not been set up yet on an environment, the checklist still shows the full feature list, but read-only — a banner reads **Sign-off storage is not set up on this environment yet**, and the result buttons, notes and assignment are disabled until that is in place. Because testers type their own names, nothing stops someone entering another person's name; the portal records the exact save time on every entry so a mix-up can be spotted in the History.

Portal Setup

One-time platform connections for your brokerage. Set the **Google / Microsoft** OAuth Client IDs that let staff connect Gmail and Outlook, and connect your **WhatsApp** channel so WhatsApp messages appear in [Client Communications](#). Do this before adding mailboxes in [Email configuration](#).

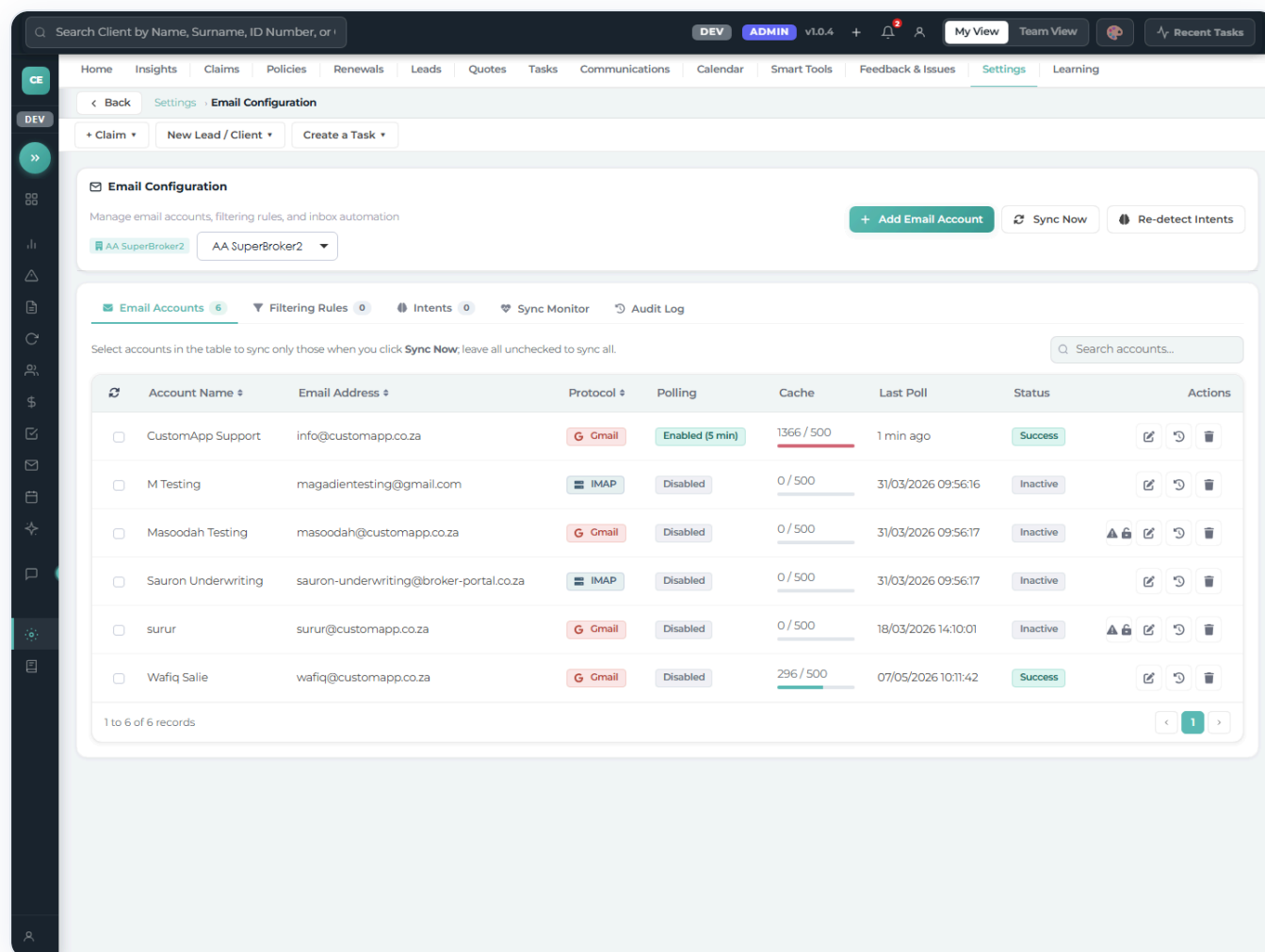
1. From [Settings hub](#), open **Portal Setup**.
2. Copy the **Redirect URI** into your Google and Microsoft OAuth app Authorized redirect URIs. This URL is only for connecting Gmail/Outlook under Email Configuration — **opening it in a browser always shows an authorization error, and that is expected**.
3. Enter the **Google** and/or **Microsoft** OAuth Client IDs for email, and save.
4. To enable WhatsApp, tick **Has WhatsApp channel**, choose your **Channel**, and enter the WhatsApp URL and authorization token where required; save.

Tip

Portal Setup comes first: connecting Gmail/Outlook needs the OAuth Client IDs, and WhatsApp won't appear in Communications until a channel is selected here.

Email configuration

Connect broker mailboxes, define filtering rules, map intents to actions, and run **Sync Now** or **Re-detect Intents** from the toolbar. Tabs typically include **Email Accounts**, **Rules**, and related automation panels.



1. From [Settings hub](#), open **Email Config**.
2. Add or edit accounts with **Add Email Account**; complete OAuth where required.
3. Review rules and intent mappings; save each section before leaving.

Setting the default send account

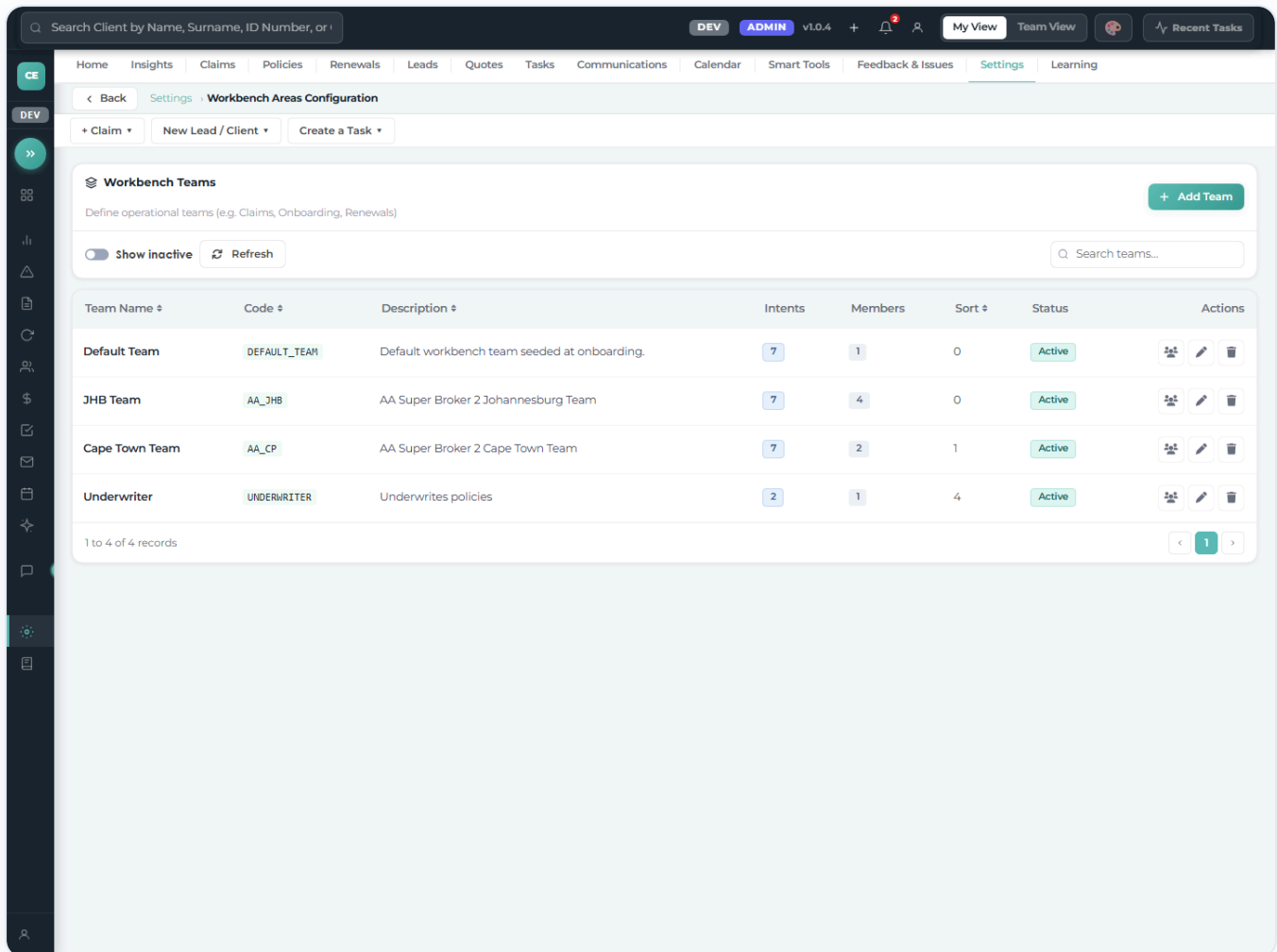
1. In the **Email Accounts** table, the current default has a **Default** badge next to its name.
2. Click the **Edit** (pencil) icon on the account you want and scroll to the bottom of the dialog.
3. Tick **Set as default email account**. The grey hint under it shows which account it replaces, then click **Save Account**.

Tip

Only one account can be the default — saving one as the default unticks the previous one. Automated emails (workflows, reports) send from it.

Workbench teams

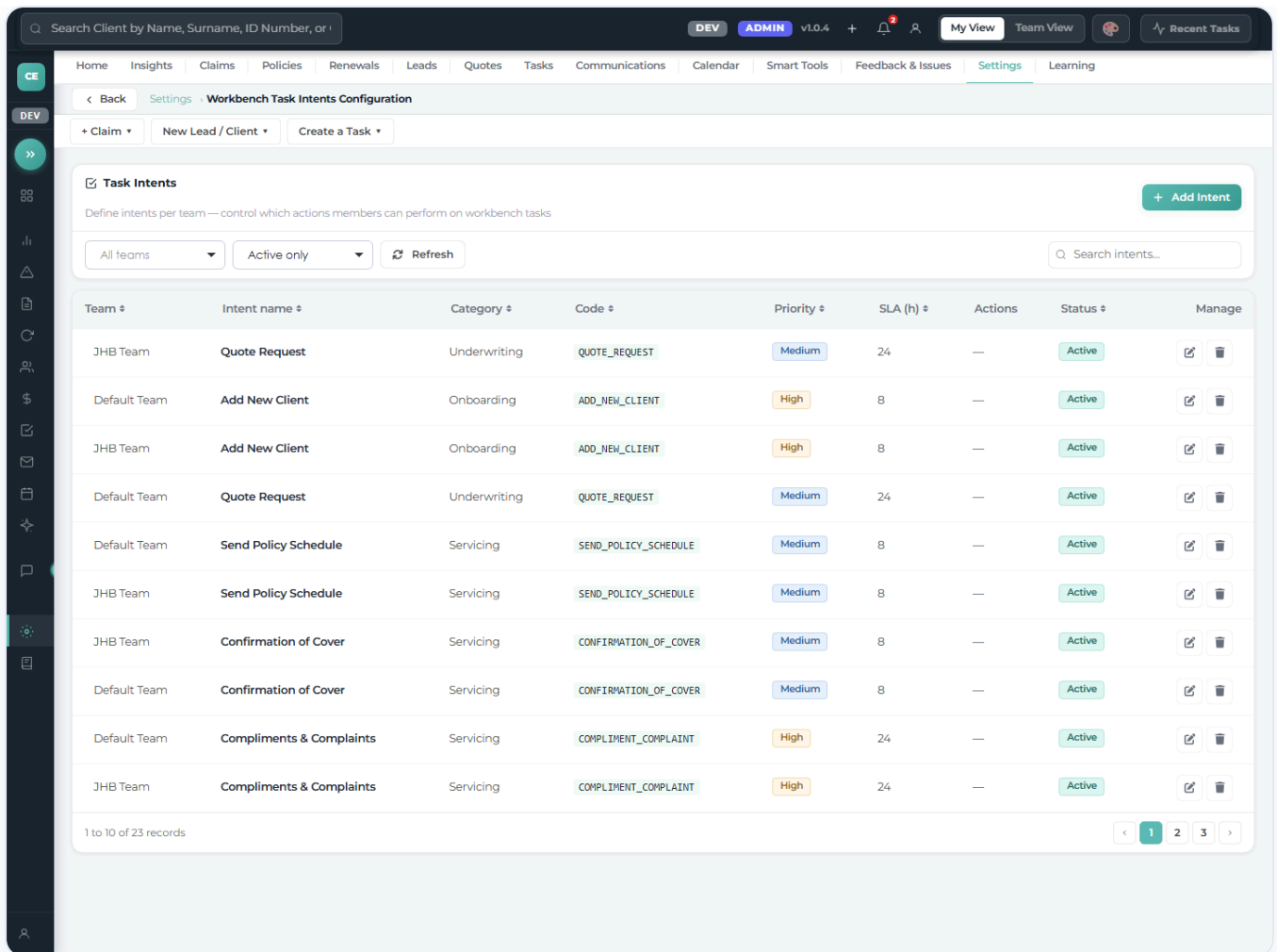
Teams (workbench areas) group work by function—Claims, Onboarding, Renewals, and similar. Users and tasks can be scoped to an area when your organisation uses area pickers on the workbench.



1. From Settings, open **Teams** under **My Workbench**.
2. Create or edit an area; assign users where the screen allows.
3. Save and confirm the area appears in workbench filters if applicable.

Task intents

Task Intents define how tasks are classified and which actions appear for each intent in the workbench and communications flows.



1. From Settings, open **Task Intents**.
2. Add or edit an intent and link allowed actions.
3. Save; new classifications apply to incoming communications according to your rules.

Smart Forms

Create AI-assisted forms from sample documents. The grid lists existing forms; **New Smart Form** opens a wizard to upload a source file and generate fields. Pair with **AI Configuration** so the broker API key is set before generation.



New form wizard

Search Client by Name, Surname, ID Number, or I

DEV ADMIN v1.0.4 + My View Team View Recent Tasks

Home Insights

Back Settings

+ Claim + New Lead

Smart Forms

Create and manage AI-generated forms

Search by form name

TWK Claim Form

A STANDARD INSURER

Ready Update

View form

Source docs

Goods in Transit Claim Form

custom 8

Ready Update

View form

Source docs

Cellphone - Policy Details

Published

View form

Source docs

Accidental Damage - Policy and Loss Details

Published Updated 24-July-2026

View form Edit

Source docs

Property Loss/Damage - Policy and Loss Details

Published Updated 24-July-2026

View form Edit

Source docs

Motor Third-Party - Policy and Loss Details

Published Updated 24-July-2026

View form Edit

Source docs

15

« < 1 2 3 4 5 > »

New Smart Form

Convert documents into interactive digital forms with AI

General Documents Instructions Review

General

Name and categorise your form, and choose how it should be generated.

Form Name * e.g. Motor Vehicle Proposal - Insurer X

Categories * (for filtering in the library) Search or select categories...

Description

Short summary shown in the library

Brand source URL (optional)

Pull the logo and brand colours from this site (e.g. <https://example.com>). Leave blank to use the document you tag as **Digitise**.

<https://www.example.com>

Form style

Standard keeps a clean, consistent look (recommended). **Brand-adaptive** matches the insurer's own colours from the brand source.

Standard (consistent)

Cancel Next: add documents

1. From Settings, open **Smart Forms**.
2. Choose **New Smart Form** and follow the wizard steps.
3. Publish or map the form via **Document type mappings** and **Actions** when ready.

AI configuration

Store your organisation's **Anthropic API key**, default model, cost controls, usage view, and alert delivery for Smart Digitisation. Run **Test connection** after saving a key. If generation fails in Smart Forms, check this screen first.

Search Client by Name, Surname, ID Number, or I

DEV ADMIN v1.0.4 + Recent Tasks

Home Insights Claims Policies Renewals Leads Quotes Tasks Communications Calendar Smart Tools Feedback & Issues Settings Learning

< Back Settings AI Configuration

+ Claim + New Lead / Client + Create a Task

AI Configuration

Anthropic API key, models, and cost controls for Smart Document Digitisation

Setup Usage Alerts Smart Tools

Suggested path

- API key is saved. You can run **Test connection** after changing the key or model.
- Optionally set **cost controls**; review **usage** once you generate forms.
- Add **budget alerts** if needed; expand **Alert delivery** for Resend / WhatsApp.

Setup: API, models & limits

Complete this block first so Smart Forms and extraction can run for this broker

Smart Forms Document Library

Prerequisite: You need an Anthropic API key. Visit console.anthropic.com to create one. Your key starts with **sk-ant-**.

API Key *

***** (leave blank to keep existing)

Stored encrypted. Leave blank to keep existing key.

Model

claude-sonnet-4-6 (Recommended) — \$3 / \$15 per MTok

↓ Input: \$3/MTok ↑ Output: \$15/MTok Balanced [Model info](#)

Test Connection

Cost Controls

Set spending limits to prevent unexpected costs. Leave blank for unlimited.

Monthly Budget (USD)

\$ 100

Extractions are blocked when this limit is reached

Max Extractions Per Day

No limit

Daily extraction limit per broker

Portal Assistant

In-portal Dot chatbot for how-to questions grounded in the user guide. Pilot: enable per brokerage after KB ingest.

☒ **Enable Portal Assistant**

Assistant model (optional)

claude-haiku-4-5 (faster / cheaper)

[Open Assistant Admin queue](#)

Advanced settings

Save Configuration

1. From Settings, open **AI Config**.
2. Enter the API key and model; save, then **Test connection**.
3. Optionally set budgets and alert channels under Usage and Alerts.

Tip

Keys are stored per broker on the server—never paste API keys into browser dev tools or share them in chat.

Smart Tools Branding

Logo, colours and footer details (trading name, FSP number, phone, email and disclaimer) printed on every Smart Tools PDF sent to clients. Any user may set it up — see [Branding](#) under Smart Tools for the full walkthrough.

1. From [Settings hub](#), open **Smart Tools Branding**.
 2. Upload a logo (it shows in its true shape), pick colours, fill in your footer details, then **Save as default**. **Fetch** and **Preview sample PDF** keep their size while busy.
-

Choose your Dot

Dot is Cardinal's assistant character — a glowing teal seed given a face and a piece of nature. Open **Settings** → **Appearance** → **Choose your Dot** to pick which look you prefer. Your choice is saved in this browser and used for both the decorative idle companion and the Portal Assistant launcher/avatar.

1. Pick one of six nature variants: **Seedling** (default), **Sprout**, **Protea**, **Aloe**, **Dewdrop**, or **Bloom**.
2. Optionally enable or disable the idle companion, set how long you must be idle before Dot appears, and how often it may reappear.
3. Turn on **React to cursor** (on by default) so Dot leans, glances, drifts away, or sheds petals near your pointer while on screen. Clicking, typing, or scrolling still makes Dot leave.
4. Use **Preview now** to watch that variant's idle motion and try the cursor reaction (for example Seedling drifts across the screen; Bloom floats to the centre with petals).
5. Save. Idle motion matches the selected Dot; the assistant launcher updates immediately.

Note

Idle Dot is decorative and click-through. The Portal Assistant launcher is a separate control that uses the same artwork. Turning idle Dot off does not disable the assistant.

Action configuration

Actions defines context-sensitive buttons (including **Open Smart Form**) shown on tasks, communications, and document flows. Use **Add Action** to create a new mapping.

Search Client by Name, Surname, ID Number, or I

DEVADMINv1.0.4+🔔👤My ViewTeam View👤Recent Tasks

HomeInsightsClaimsPoliciesRenewalsLeadsQuotesTasksCommunicationsCalendarSmart ToolsFeedback & IssuesSettingsLearning

< BackSettingsManage Actions

+ ClaimNew Lead / ClientCreate a Task

⚡ Manage Actions

Configure context-sensitive action buttons for emails, documents, and workflows

+ Add Action

AA SuperBroker2All contextsRefresh

Q Search actions...

#	Action	Context	Type	Linked	Status	Preview	Actions	
2	New Quote Create a new insurance quote	Clients	Client	0 intent(s) All roles	No providers	Active	New Quote	✎🗑
1	Generate COC Generate a Confirmation of Cover document	Communications	Email	0 intent(s) All roles	No providers	Active	Generate COC	✎🗑
1	Process Cancellation Process the policy cancellation	Communications	Email	0 intent(s) All roles	No providers	Active	Process Cancellation	✎🗑
2	Generate Cross Border Letter Generate a cross border travel letter	Communications	Email	0 intent(s) All roles	No providers	Active	Generate Cross Border Letter	✎🗑
3	Create Quote Create a new insurance quote for the client	Communications	Email	0 intent(s) All roles	No providers	Active	Create Quote	✎🗑
3	Reply Reply to acknowledge the cancellation request	Communications	Email	0 intent(s) All roles	No providers	Active	Reply	✎🗑
4	Retention (Contact Client) Initiate retention workflow by contacting the client	Communications	Email	0 intent(s) All roles	No providers	Active	Retention (Contact Client)	✎🗑
5	Add to Policy Add asset or coverage to an existing policy	Communications	Email	0 intent(s) All roles	No providers	Active	Add to Policy	✎🗑
5	Link email to task Attach this inbox email to an existing My Workbench task (ge	Communications	Email	0 intent(s) All roles	No providers	Active	Link email to task	✎🗑
5	Link to C360 client Search and link this email sender to an existing C360 client	Communications	Email	0 intent(s) All roles	No providers	Active	Link to C360 client	✎🗑

1 to 10 of 78 records

Add action modal

Add Action
Configure an action button for a specific context

How it works: Actions are context-sensitive buttons. Set Context (e.g. Communications, Clients) and Type (e.g. Email, Client). To show an action on client cards for a provider (C360, TIAL, etc.), use **Provider Actions** and assign this action there after saving. Link actions to intents in **Manage Intents**.

Action Text *
e.g., Generate Letter, Open Claim
The label displayed on the action button

Sequence #
0
Display order

Description
Tooltip or description shown to users...

Context *
Communications
Where this action appears

Type *
Client
Action category

☒ **Active**
Inactive actions are hidden from grids and provider config

Access & Visibility
☐ Restrict to specific roles
When off, all roles can see this action

Linked Providers
Search and select providers...
Auth providers (C360, TIAL, etc.) that show this action on client cards

Button Appearance
Button Style
Primary (Blue)

Icon HTML
<i class="uil uil-arrow-right me-1"></i>
Icon shown before button text

Cancel Save

1 to 10 of 78 records

1. From Settings, open **Actions**.
2. Review the grid of existing actions; use **Add Action** for a new row.
3. Complete the modal fields and save; test from a task or inbox item that matches the context.

Workflow Library

Settings → **Workflow Library** is where you manage the reusable, step-by-step **workflow templates** that become tasks on **My Tasks**. Browse your library, preview a template to see its flow, then create a new template or edit an existing one in the workflow editor. When a task is created and a workflow is chosen (the **Workflow** field on the create-task window — see **Tasks**), the selected template drives that task's steps.

- **Browse** — switch between **Cards** and **List** views, **Search** by name (**Clear** to reset), filter by **Category**, and **Sort** (for example, *Recently updated*).

- **Preview** — open a template read-only to see its phases and steps before you use or change it.
- **Add new workflow** — create a template from scratch in the workflow editor: its phases, steps, and the smart form or email each step runs.
- **Edit** — open an existing template in the editor to change its steps. **Duplicate** — copy a template as the starting point for a new one.
- **Delete** — remove a template from your library so it can no longer start new tasks. Tasks already running on that workflow keep their own saved copy and continue to work unchanged.

The list reflects the workflows available to your brokerage. See [Tasks](#) for running and tracking the work a workflow creates, and [Task intents](#) for routing inbound emails to the right workflow automatically.

FAQ

Where should I start to understand the whole product?

Read [How the Broker Portal fits together](#) first, then the workflow sections for new business, service or claims, and communications. The rest of this guide is organised by screen.

Why does help open in another tab?

The guide is designed to reuse one named tab so repeated help clicks do not flood your browser with tabs.

Download PDF versus print

Download PDF saves the committed `user-guide.pdf` next to this page (same content as the guide, including screenshots). **Print or save as PDF** uses your browser if you need different paper size or margins.

Screenshots look like grey boxes

Those are placeholders until real captures exist. From the repo: add credentials in `.env.user-guide`, run `npm run screenshots:capture`, then `npm run screenshots:embed` (see `docs/SCREENSHOTS.md`). PNG file names must match each slot under `docs/user-guide-screenshots/`.

I do not see a menu item my colleague has

Your role controls visibility. Ask your administrator to adjust permissions.

Two calendars look similar

Calendar in the sidebar is the main scheduling area for the organisation; the calendar icon on **My Workbench** only changes how your own workbench work is arranged in time—it does not replace the sidebar module.

Smart Forms or AI features fail

Ask your administrator to confirm an API key in [AI configuration](#) and that your role can open [Smart Forms](#).

My Book grid is empty

Set **From** to **1 January 2025** and **To** to today, then press **Search** on that screen. See [My Book](#).