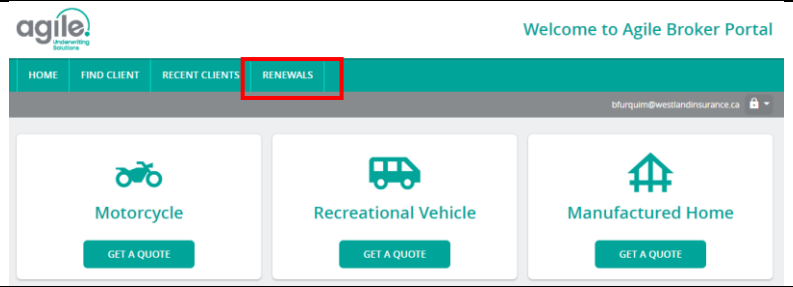
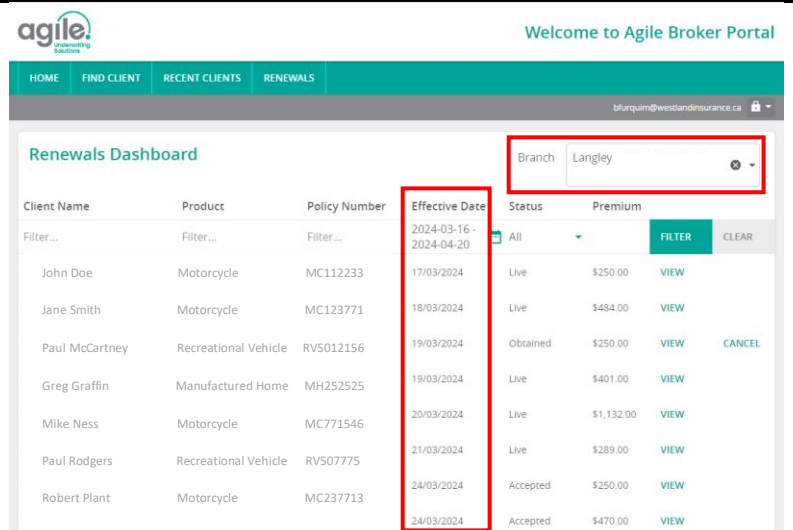


Using the Renewals Dashboard on the Agile Broker Portal

Purpose:

This tutorial explains how to use the Renewals Dashboard on the new Agile Broker Portal.

<p>1. After logging into the Agile Broker Portal, click the <Renewals> tab to see upcoming renewals based on several filters.</p> <p>It includes both manual and automated renewals.</p>	 <p>The screenshot shows the Agile Broker Portal interface. The navigation menu at the top includes HOME, FIND CLIENT, RECENT CLIENTS, and RENEWALS (highlighted with a red box). Below the menu are three main categories: Motorcycle, Recreational Vehicle, and Manufactured Home, each with a 'GET A QUOTE' button.</p>																																																															
<p>2. By default, the renewals table will load results where the policy effective date is between -5 and +30 days from the current day, and under the user's primary branch.</p> <p>3. All filters available on screen can be used individually or combined to narrow or broaden the results based on the user's desire.</p>	 <p>The screenshot shows the 'Renewals Dashboard' with a table of renewals. The 'Effective Date' column is highlighted with a red box, showing a date range of 2024-03-16 to 2024-04-20. The 'Branch' dropdown menu is also highlighted with a red box, showing 'Langley' as the selected branch. The table includes columns for Client Name, Product, Policy Number, Effective Date, Status, and Premium.</p> <table border="1"> <thead> <tr> <th>Client Name</th> <th>Product</th> <th>Policy Number</th> <th>Effective Date</th> <th>Status</th> <th>Premium</th> <th></th> </tr> </thead> <tbody> <tr> <td>John Doe</td> <td>Motorcycle</td> <td>MC112233</td> <td>17/03/2024</td> <td>Live</td> <td>\$250.00</td> <td>VIEW</td> </tr> <tr> <td>Jane Smith</td> <td>Motorcycle</td> <td>MC123771</td> <td>19/03/2024</td> <td>Live</td> <td>\$484.00</td> <td>VIEW</td> </tr> <tr> <td>Paul McCartney</td> <td>Recreational Vehicle</td> <td>RV5012156</td> <td>19/03/2024</td> <td>Obtained</td> <td>\$250.00</td> <td>VIEW CANCEL</td> </tr> <tr> <td>Greg Graffin</td> <td>Manufactured Home</td> <td>MH252525</td> <td>19/03/2024</td> <td>Live</td> <td>\$401.00</td> <td>VIEW</td> </tr> <tr> <td>Mike Ness</td> <td>Motorcycle</td> <td>MC771546</td> <td>20/03/2024</td> <td>Live</td> <td>\$1,132.00</td> <td>VIEW</td> </tr> <tr> <td>Paul Rodgers</td> <td>Recreational Vehicle</td> <td>RV507775</td> <td>21/03/2024</td> <td>Live</td> <td>\$289.00</td> <td>VIEW</td> </tr> <tr> <td>Robert Plant</td> <td>Motorcycle</td> <td>MC237713</td> <td>24/03/2024</td> <td>Accepted</td> <td>\$250.00</td> <td>VIEW</td> </tr> <tr> <td></td> <td></td> <td></td> <td>24/03/2024</td> <td>Accepted</td> <td>\$470.00</td> <td>VIEW</td> </tr> </tbody> </table>	Client Name	Product	Policy Number	Effective Date	Status	Premium		John Doe	Motorcycle	MC112233	17/03/2024	Live	\$250.00	VIEW	Jane Smith	Motorcycle	MC123771	19/03/2024	Live	\$484.00	VIEW	Paul McCartney	Recreational Vehicle	RV5012156	19/03/2024	Obtained	\$250.00	VIEW CANCEL	Greg Graffin	Manufactured Home	MH252525	19/03/2024	Live	\$401.00	VIEW	Mike Ness	Motorcycle	MC771546	20/03/2024	Live	\$1,132.00	VIEW	Paul Rodgers	Recreational Vehicle	RV507775	21/03/2024	Live	\$289.00	VIEW	Robert Plant	Motorcycle	MC237713	24/03/2024	Accepted	\$250.00	VIEW				24/03/2024	Accepted	\$470.00	VIEW
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4. All free text fields will perform an **indexed search**, meaning the value entered will return equivalent **matching results**.

Exceptions are the <Status> and <Branch> filters (dropdown list), and the <Effective date> filter (date picker).

Renewals Dashboard

Client Name: [Filter...] Product: **moto**

Client Name	Product	Policy Number
H	Motorcycle	
Al	Motorcycle	
Sl	Motorcycle	
Li	Motorcycle	
C	Motorcycle	
Jc	Motorcycle	:77795
Sl	Motorcycle	:77896
Ti	Motorcycle	:67734
Fi	Motorcycle	:67753
Tl	Motorcycle	06776

5. Optionally, the user can **change the branch** (location) within him/her brokerage.

Note: Changing the filter to **<All branches>** may take longer to display the results, especially for brokerages with many locations.

Branch: Langley

- All branches
- Port Alberni
- Chilliwack
- Abbotsford
- Abbotsford

6. After locating the desired policy, the user can click on **<View>** or **<Cancel>**, depending on the current status and the desired action.

Renewals Dashboard Branch: Victoria

Client Name	Product	Policy Number	Effective Date	Status	Premium	
Gi	Recreational Vehicle	:97	21/03/2024	Live	\$450.00	VIEW
Ec	Recreational Vehicle	:15	23/03/2024	Accepted	\$200.00	VIEW
M	Recreational Vehicle	:65	29/03/2024	Accepted	\$583.00	VIEW
Vt	Motorcycle	:73	31/03/2024	Obtained	\$250.00	VIEW CANCEL
N	Recreational Vehicle	:01	01/04/2024	Referred	\$0.00	VIEW CANCEL
D	Recreational Vehicle	:57	01/04/2024	Accepted	\$552.00	VIEW
Lj	Motorcycle	:32	03/04/2024	Accepted	\$250.00	VIEW

7. Status explanation

Live: Policy was renewed and is in-force. It will disappear from the renewals dashboard 5 days after the effective date start (it can still be retrieved in the insured's record).

Obtained: For automated renewals, it is triggered 60 days before the next term's effective date. For both manual and automated renewals, the quote can be viewed, cancelled, updated, or referred to an underwriter (if

applicable). Quote documents can be viewed or sent over via email.

Accepted: For automated renewals, it is triggered 45 days before the effective date if it is clear of referrals. Accepted quotes can be viewed, cancelled, or amended. Policy documents can also be viewed or sent over via email.

Referred: Renewal has triggered one or more referral reasons and the quote must be sent to the underwriter. The quote can still be viewed, cancelled, updated, and the documents can be sent over via email.

Pending: Renewal was manually started and is partially saved. The quote can be resumed or cancelled.