Tribunal Fees

Policy Administration: Quick Guide

BOX legal

It's important to us that all of our clients are able to use our website as easily and efficiently as possible. This Quick guide is designed to introduce you to the 'Policy Administration Area' and to help you find your way around it. This is the place where you can buy new and administer existing polices. If you have questions about anything, don't hesitate to get in touch. We're here to help!

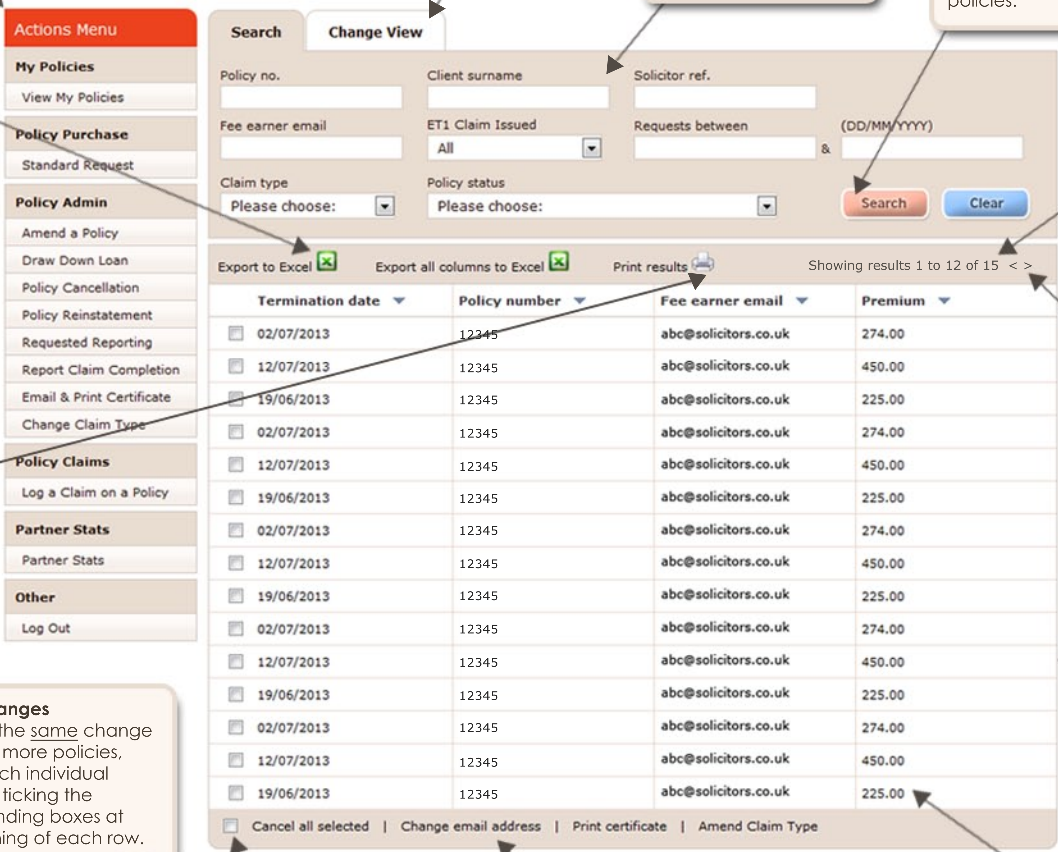
Actions Menu
The 'Actions Menu' provides access to screens where you can administer existing and buy new policies.

Change View
Select 'Change View' and choose the data options to display (up to a Maximum of 4) in the policy list. The image at the foot of the page shows all of the options available.

Search Criteria
Use any or all of the search criteria provided to find the information you're looking for.

Search
Once you've chosen your preferred search criteria, click the 'Search' button to begin. Clicking on 'Search' without selecting any criteria will display all of your policies.

Policy Administration Area



Export to Excel
Download the results of a search as an Excel spreadsheet.

Print Results
Print the results of a search.

Search Results
The total number of records produced by a search (12 in this example) are shown here.

Cycle Through Search Results
When more than 15 policies have been produced by a specific search, clicking on these arrows will allow you to cycle through them.

Policy List
Up to 15 policies are displayed on screen at one time.

Block Changes
To make the same change to one or more policies, select each individual policy by ticking the corresponding boxes at the begining of each row.

Alternatively, select all policies shown on the screen by ticking the 'Select all' box.

Once you have selected the polices you wish to amend, simply click on one of the four actions shown in the footer bar to apply it.

View Policy Details
Click on any of the data elements in the row to view full policy details.

Search/Change View Panel
To change the data options shown alongside your policies in the list, first click on the 'Change View' tab indicated by the red star at the top of the page.

In 'Change View' (shown opposite), select the data types you'd like to view by ticking the respective boxes alongside each option. Finally, click on the 'Update Columns' bar to update the column headers.