



Launch your way into the 1Web System



We do what we say. That simple!

A registered financial services provider (FSB 13404) >>

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Introducing the 1Web System

Ibiliti uses the 1Web System as our system provider. The web application is a high speed internet connectivity allowing fast delivery of web content to you. The 1Web server resides in an environmentally controlled and secure location which has emergency power (for short duration power outages) and standby power (for longer duration power outages).

Benefits of using the 1Web System

1. Operate from anywhere in the world

Experience easy quoting, policy conversion, amendments and claims notification in real time: With the 1Web System, you can operate from anywhere in the world, on as many computers

simultaneously as you please, without the need for any server, hardware or other software. The only requirement is that the computers are connected to the internet. Your employees or agents situated at different locations, on the road or even overseas, all have direct access to current information 24 hours a day, 7 days a week with no down-time for backups, month-end runs, updates, etc.

2. Manage your portfolio online

Online management modules let intermediaries view real-time data and manage their accounts and policies online: You can view policies section by section, with itemised charges and payment history. It provides flexible reporting and data analysis to enable refinement of business opportunities.

3. No need for back-ups

There is no need for making backups: Every time you press save, the data is saved to multiple locations and backed up regularly.

The policy issuing process is fully compliant and does not impact on service delivery to the client. For terms of service, back-up procedures and disaster recovery visit www.1web.co.za.

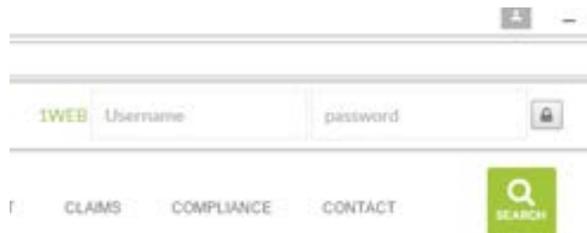
4. Save money

Save money on hardware, software and time spent on maintenance: Web-based documentation eliminates costly and wasteful distribution of printed materials. The 1Web system is, however, a system provider and charges the client a computer fee per active policy processed.

Get started with 1Web

How to... LOG IN

1. Go to www.ibiliti.co.za and click on **1Web login**. (Remember, the system is case sensitive.)
2. Type in the **username** and **password** that you received via e-mail.



How to... UPDATE YOUR DETAILS

1. Once **logged in**, the system will request you to update your details.
2. Check all the details and fill in any blank spaces.
3. Click on the **confirmation** button to confirm that all your information is correct.

How to... CHANGE YOUR USERNAME AND PASSWORD

1. **Log in** and click on the **1Web Start** button.
2. Select **Change Password** in the menu and complete the reset form.

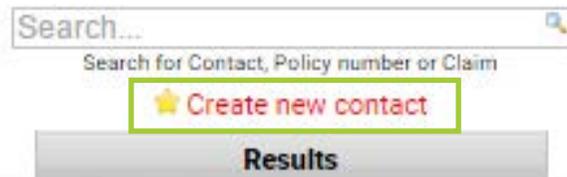
Please note: Your 1Web password must be six characters with at least one capital letter and one numerical digit. To ensure a strong password, don't use recognisable words that contain personal information. It is also safe to write down your password.

Please also note: For security reasons, the system will want to verify your e-mail address. This is a once-off procedure. As soon as you have successfully logged in, you will receive a verification code via e-mail.

Customer relationship management

How to... CREATE A CONTACT/CLIENT

1. Click on the “**Create new contact**” button below the **search bar**.



A search bar with the text "Search..." and a magnifying glass icon. Below the search bar is the text "Search for Contact, Policy number or Claim". Below that is a button with a star icon and the text "Create new contact". Below the button is a grey bar with the text "Results".

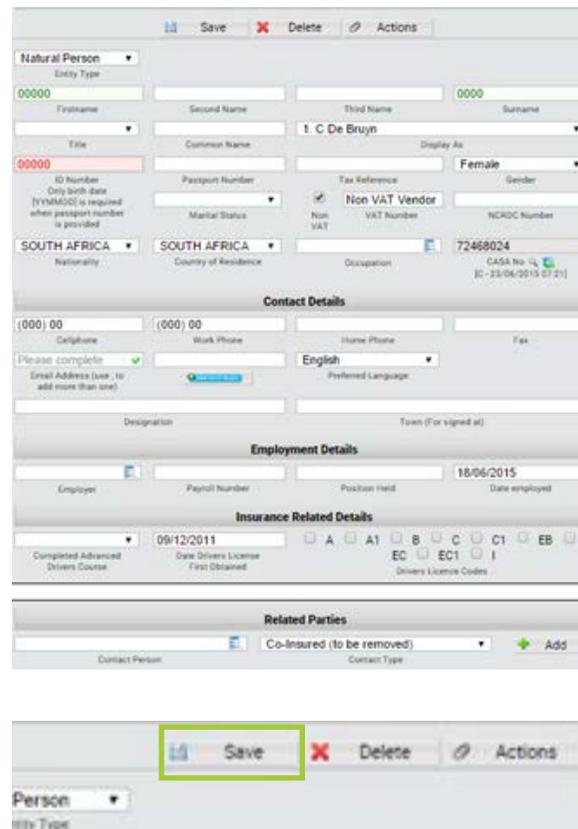
2. Follow the steps and complete all the mandatory fields.

Mandatory fields include:

- VAT section
- Address (physical and postal address)
- *Bank details (no punctuation or spaces to be used in this section)
- Entity type

3. Press save.

***Please note: Ibility MUST verify bank details. Please e-mail debit order authority to accounts@ibility.co.za or underwriting@ibility.co.za.**



A screenshot of a contact creation form. The form is titled "Natural Person" and has a "Save" button highlighted with a green box. The form contains several sections: "Personal Details" (First Name, Second Name, Third Name, Surname, Title, Common Name, Display As), "Identification" (ID Number, Passport Number, Tax Reference, Gender, Non VAT Vendor, VAT Number, NCRDC Number), "Contact Details" (Cellphone, Work Phone, Home Phone, Fax, Email Address, Preferred Language), "Employment Details" (Employer, Payroll Number, Position Held, Date employed), "Insurance Related Details" (Completed Advanced Drivers Course, Date Drivers License First Obtained, Drivers License Codes), and "Related Parties" (Contact Person, Co-insured (to be removed), Add). The "Save" button is highlighted with a green box.

Please note: If an invalid red message appears when you press save, the system will not allow you to accept the policy.

How to... SEARCH FOR A CONTACT/CLIENT

1. Type the name, surname, or part of the company name of your contact in the **search bar**.
1. Click on the **magnifying glass** button or press **enter**. (All clients that contain your search text will be displayed.)



A search bar with the text "Search..." and a magnifying glass icon. Below the search bar is the text "Search for Contact, Policy number or Claim". Below that is a button with a star icon and the text "Create new contact". Below the button is a grey bar with the text "Results".

Policy administration

How to...

SUBMIT A QUOTE/ ENDORSEMENT FOR APPROVAL

1. Create or search for a contact in the **Contacts** tab.
2. Click the **envelope** next to the searched name.
3. Complete the **General** tab, check the **Broker** and **Save**.
4. Complete the **Address** tab by selecting the applicable address.
5. Complete the **Items** tab and **save**.
6. Add new items by clicking on **Add new Item**.
7. View the contents of the quote on the **Premium Computation** tab.
8. Double check premium and date details in the **Summary** tab.
9. Return to the **General** tab and click on the **Submit for Approval** button.
10. An e-mail will be generated and sent automatically to the underwriter and added to their workflow to approve.
11. The quote status will reflect "**Waiting for Approval**" next to the policy number.

Policy administration

How to... ACCEPT A QUOTE

1. Accepted quotes/endorsements are found under the **General** tab.
2. Approved quotes are marked with a **blue information icon**.
3. When your client is 100% happy with his/her quotation and has signed the proposal, disclosure and debit order authority, click on the **policy number**.
4. Read the disclaimer that is generated by the product provider.
5. Press **continue** to activate the policy.
6. The policy number will turn **green**.
The policy will be marked as **active** next to the schedule number.

Please note: All changes to the policy is version controlled.

MUTUAL & FEDERAL | risk financing | ibiliti

123 Excess Cover(ibiliti) 123EMF/516155.0

Quote

Save Actions Submit Discard

New quote

Reason for schedule (To be shown on Schedule) Comments (To be shown on Schedule)

New Business Endorsement reason Broker Brokerage

Debit Order - ibiliti Underwriting Managers (EPIC) No valid Bank accounts found. Please load a bank account for the creditor.

Payment Method

01/03/2016 31/03/2016 Insured to 17/02/2016 Anniversary Date

Monthly Terminal period No Declaration Yes Series Monthly Series period

New Business Taken Status Previous Policy Number (E) Broker's Policy Number

Add compound entry

Edit Info Save

General Summary Reports Addresses

Product Sections

SENSIBILITI WHEN YOU PANIC

Sensibiliti

Edit section in grid view

Add new item...

ASSET REGISTER

Edit section in grid view

Add new item...

GENERAL TERMS AND CONDITIONS

MULTIPLE EXCESS (non motor)

Edit section in grid view

Add new item...

BASIC EXCESS (motor and plant)

Edit section in grid view

THEFT HIJACK EXCESS (motor and plant)

Edit section in grid view

THIRD PARTY EXCESS (motor and

How to... DECLINE A QUOTE

1. Quotes waiting for acceptance by the broker are listed in the daily workflow report.
2. The quote number will be marked in blue.
3. In the **General** tab, click on the **decline** button.
4. Provide a descriptive reason for not accepting the quote.
5. Click on continue.

Quote

Schedule Accept Decline

cept from

Policy administration

How to... AMEND OR CANCEL ITEMS

1. Go to the **General** tab.
2. Click on the approved quotes marked in blue.
1. Click **Decline**.
1. Click on **Add, Amend or cancel** one or more items.

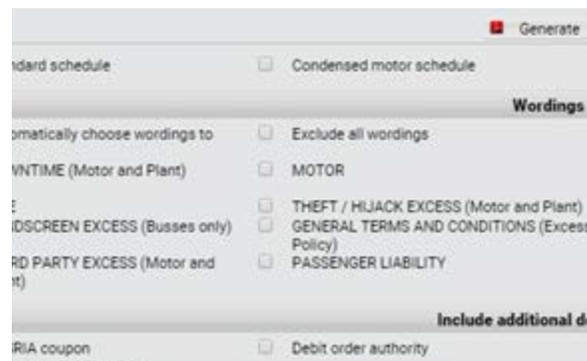
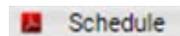


2. Make the necessary changes.
3. Re-submit the quote.

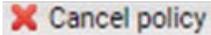
How to... PRINT A POLICY

1. In the **General** screen, click on **Generate Schedule**.
2. Select the e-mail address that you want to schedule to be sent to.
3. Click on the **Adobe icon** on the top right corner and the system will send the schedule.

Please note: You can print the quote schedule, disclosure, declaration and debit order.



How to... CANCEL A POLICY

1. Click on the **active policy**.
 2. In the **General** tab, click on the **Cancel the policy** button.
- 
3. **Enter the cancellation date** and ensure that this date is the correct date as it will impact on the premium. The cancellation date is defaulted to the current date. If you need to cancel from inception or any other date please amend the date accordingly.
 4. Press the **continue** button.
 5. **Submit** your cancellation for approval.
 6. The underwriter will approve your cancellation.
 7. The policy must be accepted for the cancellation to be active. Next to the schedule number it will mark the version of your policy as cancelled.
 8. Ensure that the cancellation reverts the policy premium back to zero in the **Financials** tab, unless an amount is still due. The system will automatically continue to debit the client's bank account every month until the balance in the financials is settled.

Administration

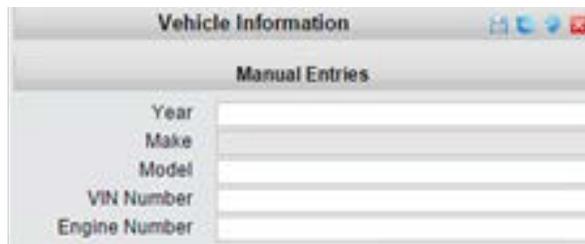
How to...

SEARCH FOR A VEHICLE MAKE OR MODEL

1. Under the **Asset Register** section, enter the registration number and click on “**more**” to search for vehicle details.
2. Please note that for any vehicles with the year prior to 2005, will not be automatically picked up by the system and will have to be completed manually.
3. When searching manually, only complete the model field (do not use the make of the vehicle), select a vehicle from the drop down list and click on it.



Registration number More



Vehicle Information

Manual Entries

Year	<input type="text"/>
Make	<input type="text"/>
Model	<input type="text"/>
VIN Number	<input type="text"/>
Engine Number	<input type="text"/>

How to...

REINSTATE A POLICY

To re-instate a policy, follow the instructions for [How to... Create a new contact >>](#).

How to...

RENEW A POLICY

1. Click on an active policy.
2. In the **General** tab click on **Add, amend or cancel** one or more items.
3. Make your renewal changes in the various tabs and save.
4. Return to the **General** tab and change the anniversary date (for example: if the renewal was 01.05.2010 the renewal date should change to 01.05.2011), check the effective date, fees, payment method etc. and save.
5. Click the **Submit for Approval** button.

How to...

SUBMIT A CLAIM

All new claims must be submitted to Ibiliti's Claims Department: claims@ibiliti.co.za.
[Download the Claims form here. >>](#)

Commission administration

The 1Web System provides the fully incorporated commission administration system, where you are able to track your commission by policy, as well as by item on the policy.

How to...

VIEW COMMISSION PAYMENTS AND STATEMENTS

1. **Search** your brokerage.
2. Click on the **Financial** tab.
3. Click on the **Commission** sub-tab.
4. The commission statements for all months will appear on the screen. Make sure that the filter at the top is set to **None**.
5. Click on the month that you would like to view or on the total to view an overall statement.
6. Click on the **orange clipboard** next to the month and select view detailed transaction listing and **save the Adobe format statement**.
7. Invoices amount raised (new policies, endorsements, etc.) will reflect as a credit note due to the broker.
8. Credit note passed (negative endorsements, cancellation, etc.) will reflect as a debit note due to Ibliti.

9000/004 - Commission Payable - Debit order and EFT						
Company	Total	Future	Next 30 Days Mar 2016	Total (Excl Future)	Current Feb 2016	30 Days Jan 2016
Ibliti Underwriting Managers (Pty) Ltd T/A Ibliti	R 9 687.43	-	-	R 9 687.43	-	-

Ibliti Underwriting Managers (Pty) Ltd T/A Ibliti: 9000/004 - Commission Payable	Filter display to only show	None
Contact selected: Ibliti Underwriting Managers (Pty) Ltd T/A Ibliti		

Document Type	Debit	Credit	Cumulative
April 2013			
Payment	R 6 188.97		R 6 188.97
August 2013			
Payment	R 3 498.46		R 9 687.43
November 2014			
Bordereaux Collection	-		R 9 687.43
December 2014			
Bordereaux Collection	-		R 9 687.43
February 2015			
Bordereaux Collection		R -39.78	R 9 647.65
March 2015			
Bordereaux Collection	R 39.78		R 9 687.43
May 2015			
Bordereaux Collection	-		R 9 687.43
June 2015			
Bordereaux Collection	-		R 9 687.43
July 2015			
Bordereaux Collection	-		R 9 687.43
August 2015			
Bordereaux Collection	-		R 9 687.43
Total	R 9 727.21	R -39.78	R 9 687.43

Payments/collections

New business

A new business premium will be collected on the selected strike date. If a pro rata is due, this will also be debited on the collection date specified on the debit order authority if the debit has not yet been processed. If not, it will be debited during the following month unless the broker instructs us otherwise in writing.

Forced debits (pro ratas new business)

Forced debits will only be processed on new businesses if selected. All forced debits have to be referred to Ibiliti's Finance Department.

Debit order rejections

For collection returned, the premium will be re-debited and details of the date and amount will be notified via e-mail to the broker.

- **First rejection:** Notification via e-mail titled **[Debit Order Rejection]** is sent to the broker along with the re-debit dates.

- **Second rejection:** Notification via e-mail title **[Debit Order Rejection – Pending Cancellation]** is sent to the broker along with the re-debit dates.
- **Third rejection:** Notification via e-mail titled **[Debit Order Rejection – Policy Cancelled]** is sent to the broker advising that the policy will be cancelled due to outstanding premiums. A cancelled policy endorsement is also sent.

Refunds

Refunds due to the client will automatically be adjusted against the next month's premium collection. If a client requests an immediate refund, the broker will have to make special arrangements with the Ibiliti's Finance Departments. If the policy is cancelled and a refund is due to the client, the broker will be notified via e-mail of the refund date and amount.

Direct deposits

1. EFTs on EFT payment method based clients.

If a client is selected as an EFT client, then direct cash deposits or EFTs will be accepted in Ibiliti's bank account, only if the broker confirms that the payment has been made and proof of payment has been send to **accounts@ibiliti.co.za**. It will enable our Finance Department to allocate the amount to the bank statement when Ibiliti's bank has confirmed the transaction.

2. EFTs on debit order clients

Ibiliti may choose not to accept direct cash deposits or EFTs into our bank accounts. Each case is considered on merit.

E-filing and recording

Go paperless in your business. You have the facility to attach supporting documents to each of your clients' 'files'.

Financial Reporting

1. Click on the **contact** that has an active policy.
2. In the Financial tab, select the premium total.
(Please note: The title will vary according to the payment method selected.)
3. Transactions for all months will appear on the screen. Ensure that the filter on the top is set to **None**.
4. Selected the **totals** to get an overall statement.
5. Invoice amount raised (new policies, endorsements, etc.) will reflect as a debit note due to Ibiliti.
6. Credit note passed (negative endorsements, cancellations, receipts etc.) will reflect as a credit note for a premium due to the insured.
7. All debit notes has a version link to the policy that reflect all the changes/endorsements on the policy that may have impacted on the financials.
8. To track stages, see **policy endorsement number**.

Financial Activity Statement

Accounts Receivable grouped by: Collection / payment method

7100/001 - Premium - 1Web system bordereaux control account										
Company	Total	Future	Next 30 Days Mar 2016	Total (Excl Future)	Current Feb 2016	30 Days Jan 2016	60 Days Dec 2015	90 Days Nov 2015	=<= 120 Days <= Oct 2015	
Aimsa - Ibiliti Underwriting Managers	R									
MFRF - Ibiliti Underwriting Managers	R									
7100/001 - Premium - EFT										
Company	Total	Future	Next 30 Days Mar 2016	Total (Excl Future)	Current Feb 2016	30 Days Jan 2016	60 Days Dec 2015	90 Days Nov 2015	=<= 120 Days <= Oct 2015	
Ibiliti Underwriting Managers (Pty) Ltd T/A Ibiliti	R 4 568.20	R 4 363.00	R 480.20	R -275.00						R -275.00

Ibiliti Underwriting Managers (Pty) Ltd T/A Ibiliti: 7100/001 - Premium Filter display to only show: None

Contact selected: Kemong Transportation and Projects CC

View Statement

I reviewed | I referred | In progress

Document Type	Debit	Credit	Cumulative
April 2015			
Bordereaux Collection	R 4 363.00		R 4 363.00
Receipt		R -4 638.00	R -275.00
May 2015			
Bordereaux Collection			R -275.00
March 2016			
Bordereaux Collection	R 480.20		R 205.20
April 2016			
Bordereaux Collection	R 4 363.00		R 4 568.20
Total	R 9 206.20	R -4 638.00	R 4 568.20

1Web Statement of work

User responsibilities

1. The user will provide fast internet access to the people within their organisation at their various locations, in accordance with the 1Web standards and practices as specified below.
2. The user will install the relevant internet browsers and standard Microsoft software applications suggested at their branch locations in accordance with the 1Web standards and practices as specified below.
3. The user will be responsible for inputting, examining and checking the accuracy and correctness of all information and data contained in and/or produced by the 1Web System and shall be responsible for notifying 1Web of any discrepancy thereof that they may encounter.

Minimum requirements

Internet speed requirements

- The number one solution is to create a separate internet line for e-mails and web.
- A fast internet line. We suggest a 4meg ADSL line, would be sufficient for 10 people who are office bound.
- Your outbound consultants might need a 3G card so they can have access to their data anywhere at any time. In areas where connection is not strong, they could experience difficulty, so they need back up at the office. Their access on the 3G card also makes a difference in term of the package (size they are permitted to download and the speed).

They need to be able to download policy schedules, quotes as well as import documentations.

- Installation of latest internet browsers for optimum performance, Internet Explorer7 or up, Firefox, Apple Safari, or Google Chrome.
- Hardware requirements – if the hardware is able to run the above software applications it will be able to run the 1Web System.

Contact details

For training tutorials and videos
visit www.1web.co.za.

Helpdesk
helpdesk@1web.co.za

Broker/intermediary
training and support
info@1web.co.za

Office hours
08:00 to 16:30

