

DAS Connect – System User Guide



Objectives



By the end of this training session you will be able to:

- Build a client profile and provide a quote
- Find a client
- Review and amend client details
- Action a mid term adjustment
- Renew a client policy

Logging In



The screenshot shows the DAS Connect login interface. At the top left is the DAS logo with the tagline "FIRST FOR JUSTICE". To the right, it says "Welcome to DAS Connect". Below this is a dark blue navigation bar with buttons for "ADD CLIENT", "FIND CLIENT", "CHANGE PASSWORD", and "LOG OUT". A "Recent Clients" button is also present. On the right side of the navigation bar, there is a user profile icon and the email address "hannah.davies@das.co.uk".

The main content area features a "Login" form. The form has a title "Login" and two input fields: "Login ID" and "Password". Below the input fields are two buttons: "Forgotten your password?" and "Login".

Below the login form is a "Cookie Policy" section. It includes an information icon and the text: "We use cookies to improve your browsing experience and understand how you use our site. By continuing to use our website you agree to our use of cookies."

At the bottom of the page, there is a dark blue footer containing the following text: "DAS Legal Expenses Insurance Company Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority (FRN202106) and the Prudential Regulation Authority", "Privacy Notice", and "Powered by Acturis - © Acturis Limited 2018".

The first port of call is logging in to DAS Connect.

Use the log in ID provided; you will receive this in an email from DAS and will need to update the password when you log in.



Logging In

A screenshot of the DAS Connect web application. At the top left is the DAS logo with the tagline 'FIRST FOR JUSTICE'. To the right, it says 'Welcome to DAS Connect'. Below this is a dark blue navigation bar with four buttons: 'ADD CLIENT', 'FIND CLIENT', 'CHANGE PASSWORD', and 'LOG OUT'. The 'ADD CLIENT' and 'FIND CLIENT' buttons are highlighted with red boxes. Below the navigation bar, there is a user profile section showing 'Recent Clients' and the email address 'hannah.davies@das.co.uk'. The main content area is titled 'Find Client' and contains a search form. The form has a 'Search on' dropdown menu set to 'Client name', a 'Client name' input field with a red asterisk indicating it is mandatory, and two buttons: 'Search' and 'Clear'. At the bottom of the page, there is a footer with regulatory information and a 'Privacy Notice' link.

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Privacy Notice

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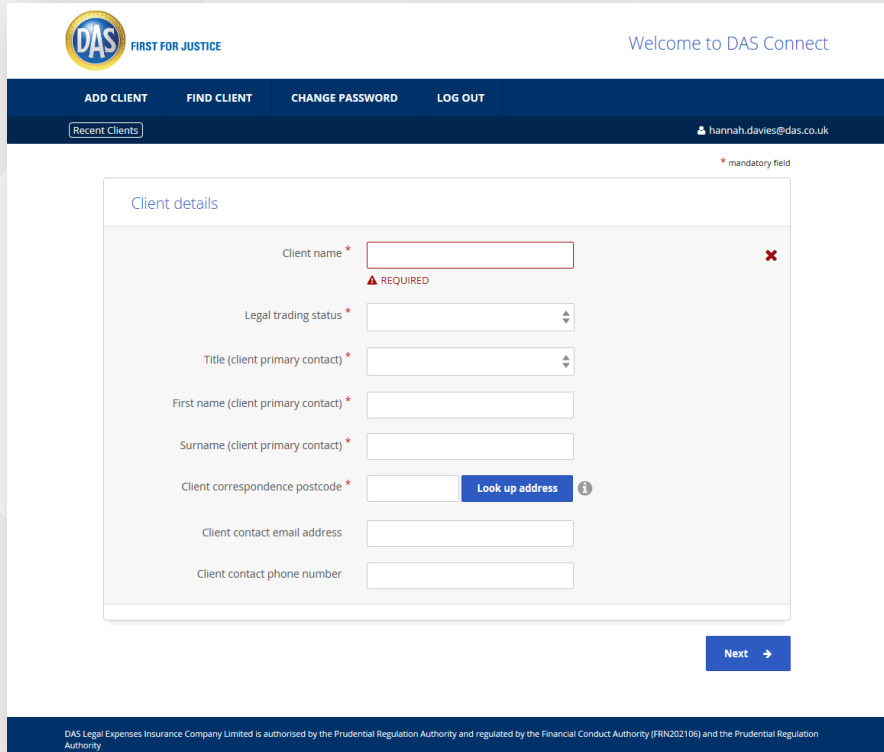
Once logged in you will automatically be taken to the 'Find Client' page.

You will also notice options at the top of the screen where you can update your password, and return to the 'Add Client' screen.

You will also be able to search for a client and log out, which we will look at later in the training.



Adding A Client



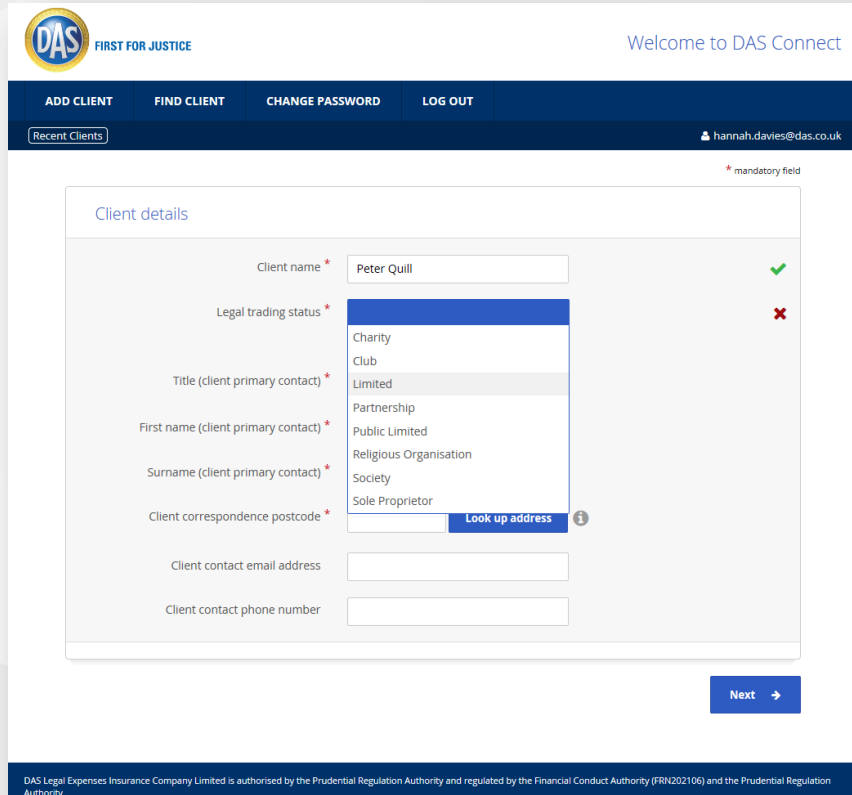
The screenshot shows the 'ADD CLIENT' page in the DAS Connect system. The header includes the DAS logo and the text 'FIRST FOR JUSTICE'. The navigation bar contains 'ADD CLIENT', 'FIND CLIENT', 'CHANGE PASSWORD', and 'LOG OUT'. A 'Recent Clients' button is visible on the left, and the user's email 'hannah.davies@das.co.uk' is on the right. The main form is titled 'Client details' and contains several fields: 'Client name' (required, empty), 'Legal trading status' (dropdown), 'Title (client primary contact)' (dropdown), 'First name (client primary contact)' (text), 'Surname (client primary contact)' (text), 'Client correspondence postcode' (text with a 'Look up address' button), 'Client contact email address' (text), and 'Client contact phone number' (text). A 'Next' button is at the bottom right. A red asterisk indicates a mandatory field.

First we will take a look at how to add a client on the system.

Select the 'Add Client' option from the login page and you will be taken to this page.

Some fields have red asterisks by them; these are required fields and must be populated. You will not be able to complete the screen until all the required fields have been populated.

Adding A Client



The screenshot shows the 'ADD CLIENT' form in the DAS Connect system. The header includes the DAS logo and 'FIRST FOR JUSTICE' slogan, along with a 'Welcome to DAS Connect' message. The navigation bar contains 'ADD CLIENT', 'FIND CLIENT', 'CHANGE PASSWORD', and 'LOG OUT'. A 'Recent Clients' button and the user email 'hannah.davies@das.co.uk' are also visible. The main form area is titled 'Client details' and contains several fields: 'Client name' (filled with 'Peter Quill'), 'Legal trading status' (a dropdown menu with options like Charity, Club, Limited, Partnership, Public Limited, Religious Organisation, Society, and Sole Proprietor), 'Title (client primary contact)', 'First name (client primary contact)', 'Surname (client primary contact)', 'Client correspondence postcode' (with a 'Look up address' button), 'Client contact email address', and 'Client contact phone number'. A 'Next' button is at the bottom right. A footer note states: 'DAS Legal Expenses Insurance Company Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority (FRN202106) and the Prudential Regulation Authority'.

WELCOME TO DAS CONNECT

ADD CLIENT FIND CLIENT CHANGE PASSWORD LOG OUT

Recent Clients hannah.davies@das.co.uk

* mandatory field

Client details

Client name * Peter Quill ✓

Legal trading status * [dropdown menu] ✗

Title (client primary contact) *

First name (client primary contact) *

Surname (client primary contact) *

Client correspondence postcode * [input field] Look up address ⓘ

Client contact email address [input field]

Client contact phone number [input field]

Next →

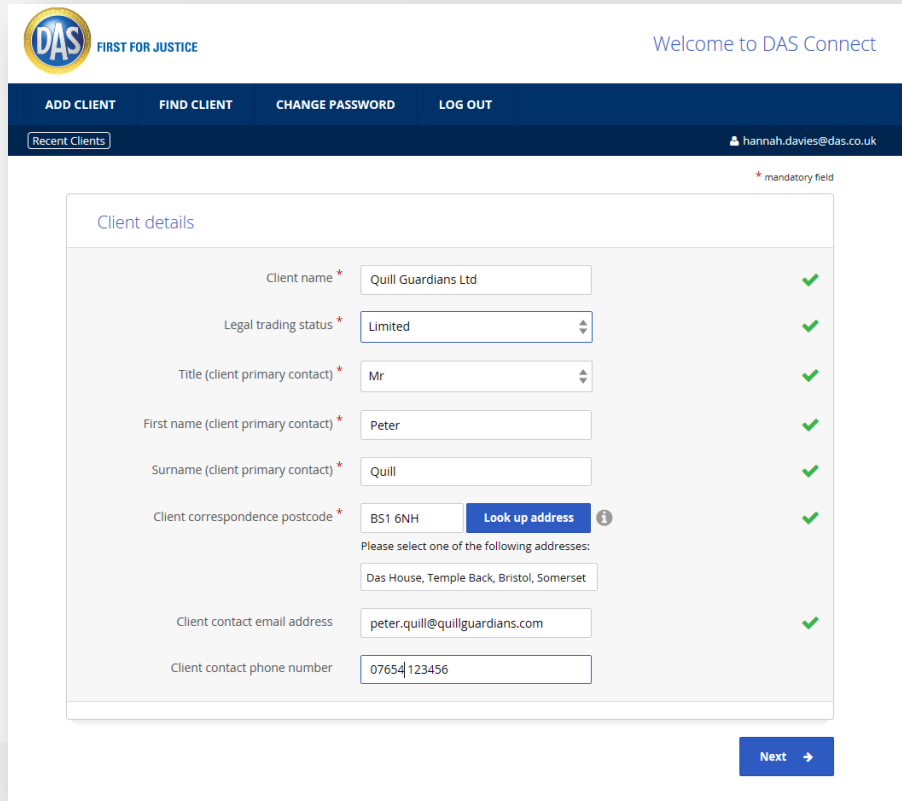
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Certain boxes will contain a drop down option, such as legal trading status.

Adding A Client

You will be able to look up an address by entering a postcode. This will then provide you with a list of addresses for that postcode.

You will need to select the address by clicking on it, which will then automatically populate the address fields.



WELCOME TO DAS CONNECT

ADD CLIENT FIND CLIENT CHANGE PASSWORD LOG OUT

Recent Clients hannah.davies@das.co.uk

* mandatory field

Client details

Client name *	Quill Guardians Ltd	✓
Legal trading status *	Limited	✓
Title (client primary contact) *	Mr	✓
First name (client primary contact) *	Peter	✓
Surname (client primary contact) *	Quill	✓
Client correspondence postcode *	BS1 6NH Look up address ⓘ	✓
Please select one of the following addresses:		
Das House, Temple Back, Bristol, Somerset		
Client contact email address	peter.quill@quillguardians.com	✓
Client contact phone number	07654 123456	

Next →

Green ticks will appear next to the populated fields to confirm they have been correctly entered.

Adding A Client



A screenshot of the DAS Connect web application. At the top left is the DAS logo with the tagline "FIRST FOR JUSTICE". To the right, it says "Welcome to DAS Connect". Below this is a dark blue navigation bar with buttons for "ADD CLIENT", "FIND CLIENT", "CHANGE PASSWORD", and "LOG OUT". Underneath the navigation bar, it shows "You are currently editing" followed by two buttons: "Hydra Inc" and "Recent Clients". On the right side of this bar is a user profile icon and the email address "hannah.davies@das.co.uk". The main content area has two large grey boxes, each with a wrench icon in a white circle. The left box is labeled "Commercial Legal Expenses" and the right box is labeled "DAS Loss Assist Business". At the bottom of the page, there is a dark blue footer containing regulatory information: "DAS Legal Expenses Insurance Company Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority (FRN202106) and the Prudential Regulation Authority", a "Privacy Notice" link, and "Powered by Acturis - © Acturis Limited 2018".

You will now have the option of selecting the product. You will be given the opportunity to review the clients details again before setting up the client policy.

The following slides relate to processing a Commercial Legal Expenses quote.

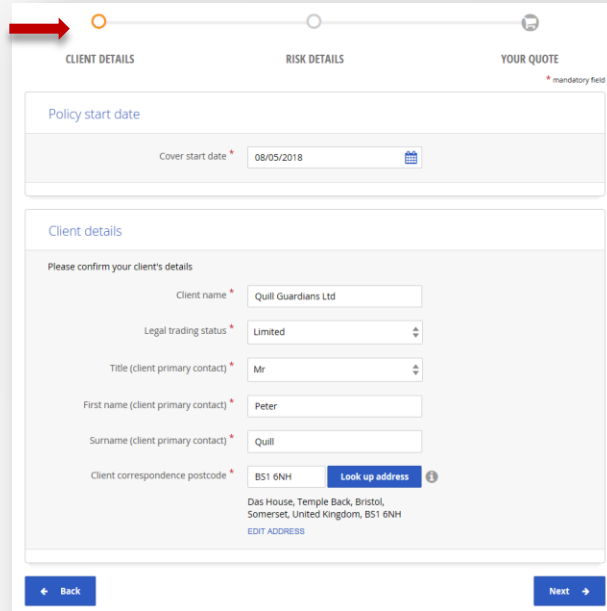
The process for obtaining a Loss Assist business quote is the same.



Adding Risk Details

You will notice at the top of the screen there is a progress bar to let you know what stage you are at when creating a new customer quote.

This screen requires the start date of the policy to be entered. It defaults to today's date.



CLIENT DETAILS RISK DETAILS YOUR QUOTE

Policy start date

Cover start date * 08/05/2018

Client details

Please confirm your client's details

Client name * Quill Guardians Ltd

Legal trading status * Limited

Title (client primary contact) * Mr

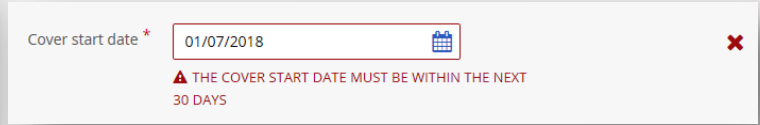
First name (client primary contact) * Peter

Surname (client primary contact) * Quill

Client correspondence postcode * B51 6NH [Look up address](#)

Des House, Temple Back, Bristol, Somerset, United Kingdom, B51 6NH
[EDIT ADDRESS](#)

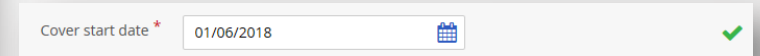
Back Next



Cover start date * 01/07/2018

THE COVER START DATE MUST BE WITHIN THE NEXT 30 DAYS

The cover date must be within the next 30 days, the system will prompt you if you are outside that period.



Cover start date * 01/06/2018

Once you have input and checked the data press the 'Next' button to continue.

Adding Risk Details – continued

Progress bar: ✓ CLIENT DETAILS | ○ RISK DETAILS | 📄 YOUR QUOTE

* mandatory field

Business Details

Main Business Trade *	<input type="text" value="Insurance"/>	✓
Business Description *	<input type="text" value="Insurance"/>	✓
Total number of directors, employees and sub-contractors in your business (including yourself) *	<input type="text" value="1"/> ⓘ	✓
Total Wageroll *	<input type="text" value="130,000"/>	✓
Turnover (including Rental Income) *	<input type="text" value="260,000"/>	✓
Total Rental Income from Commercial Premises *	<input type="text" value="0"/>	
Total Rental Income from Residential Premises *	<input type="text" value="0"/>	
Combined Total	<input type="text" value="0"/>	
How many legal disputes, prosecutions (excluding motoring offences) and tax enquires from HMRC has the business had in the last 5 years? *	<input type="text" value="0"/>	✓

This screen is made up of compulsory fields, the information provided needs to be accurate.

The risk details need to be completed on this page. To do so you will need to ensure you have scrolled down to the bottom of the page to answer all questions.

Once the fields have been entered additional options will appear (if additional options are available) at the bottom of the screen, including cover options and declarations.

Adding Risk Details – continued

Total Wageroll *

Turnover (including Rental Income) *



Cover Options

Limit of Indemnity *

The following covers are included:

- Legal advice
- Counselling service
- Tax advice
- DAS Businesslaw
- DAS employment manual
- Legal services
- Business legal healthcheck
- Redundancy approval service

Please select the additional covers you would like to include

Employment and compensation awards * Yes No

Legal defence * Yes No

Property protection * Yes No

Personal injury * Yes No

Tax protection * Yes No

Statutory licence appeals * Yes No

Contract disputes * Yes No

Debt recovery * Yes No

Let property * Yes No

Crisis containment * Yes No

If the business turnover is over £5 million per annum there will be additional cover available to include. These additional covers will only appear if the turnover is above £5 million.

The helplines are included as standard, you will have an option of which heads of cover to choose. There must be a minimum of one insured cover to continue.

Adding Risk Details – continued

Cover Options

Limit of Indemnity *

£250,000



Cover Options

Limit of Indemnity *

The following covers are included:

£250,000

£300,000

£350,000

£400,000

£450,000

£500,000

When completing the cover options, you will be given the option of amending the limit of indemnity.

Adding Risk Details – continued

Declarations

Has the business ever had legal expenses insurance cancelled, been refused legal expenses insurance or had special conditions imposed? Yes No

Are you aware of any circumstances that may give rise to a claim? Yes No

Has the business been taken over, merged with, acquired or disposed of any companies or significant business activities in the last 3 years, or are any currently under consideration? Yes No

Has any proposer, director or partner of the Trade or Business or its Subsidiary Companies ever, either personally or in any business capacity had any convictions or criminal offences which are not spent under the Rehabilitation of Offenders Act or has any prosecutions pending? Yes No

Has any proposer, director or partner of the Trade or Business or its Subsidiary Companies ever, either personally or in any business capacity been declared bankrupt or insolvent or been the subject of bankruptcy proceedings or insolvency proceedings? Yes No

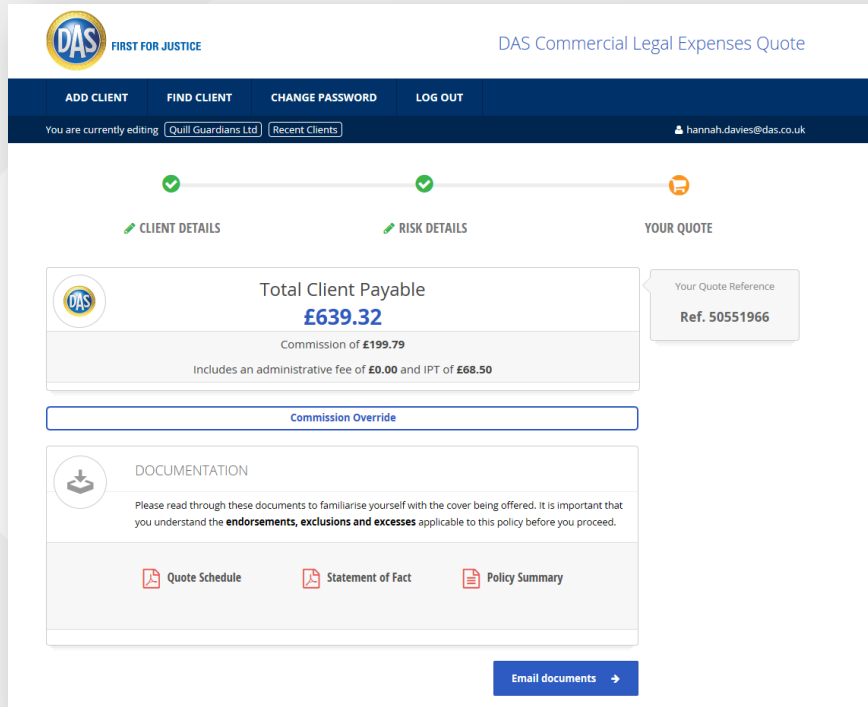
[← Back](#) [Save & Exit →](#) [Next →](#)

Once the cover options have been selected the declarations need to be actioned.

You should check the declarations are correct, then click on the next button.

If there are any amendments you would like to make to the policy you can select the back button to make the changes.

Quote Screen And Completion



The screenshot shows the DAS Commercial Legal Expenses Quote interface. At the top, the DAS logo and 'FIRST FOR JUSTICE' are on the left, and 'DAS Commercial Legal Expenses Quote' is on the right. Below this is a dark blue navigation bar with links for 'ADD CLIENT', 'FIND CLIENT', 'CHANGE PASSWORD', and 'LOG OUT'. A status bar indicates 'You are currently editing Quill Guardians Ltd' and 'Recent Clients', along with the user email 'hannah.davies@das.co.uk'. A progress bar shows three steps: 'CLIENT DETAILS' (completed), 'RISK DETAILS' (completed), and 'YOUR QUOTE' (current step). The main content area displays the 'Total Client Payable' as £639.32, with a commission of £199.79. It also notes an administrative fee of £0.00 and IPT of £68.50. A 'Commission Override' field is present. Below this is a 'DOCUMENTATION' section with a download icon and text: 'Please read through these documents to familiarise yourself with the cover being offered. It is important that you understand the **endorsements, exclusions and excesses** applicable to this policy before you proceed.' Three document icons are shown: 'Quote Schedule', 'Statement of Fact', and 'Policy Summary'. At the bottom right, there is a blue button labeled 'Email documents' with a right-pointing arrow.

The quote screen will provide the following information and options.

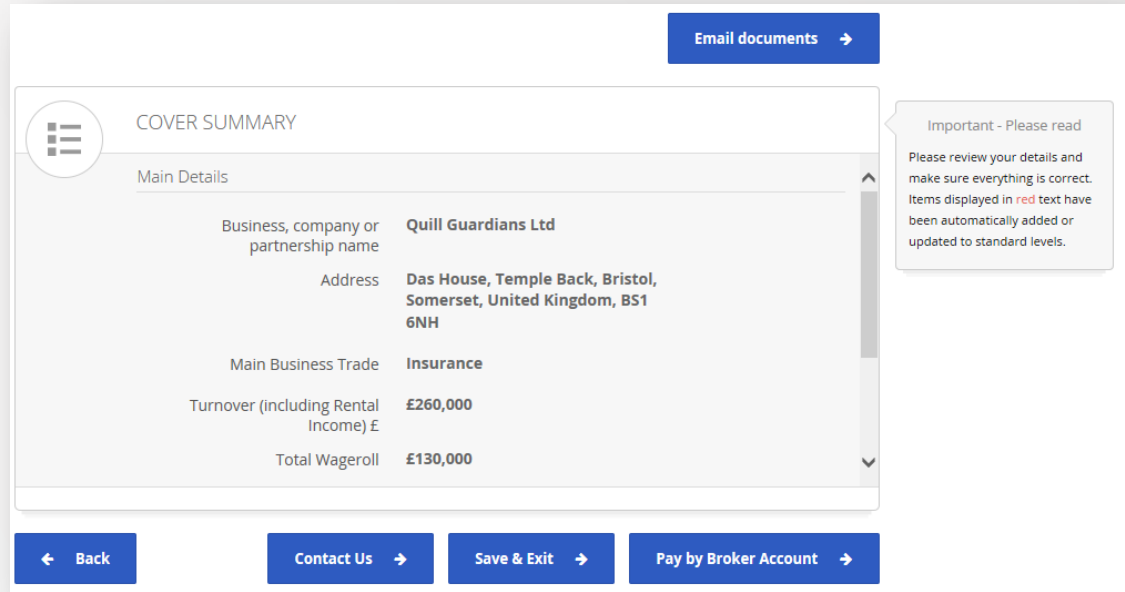
- Total amount payable for the client
- The policy documentation, including the quote schedule, the quote statement of fact, IPID and the policy wording. There is also the option to email the documentation.
- There is also an option for commission override if required.

Quote Screen And Completion

Below the total amount payable and documents there will be a summary of the clients cover.

Before confirming or agreeing the cover ensure the client details and cover is correct.

Be aware any items in **RED** text have been automatically added to the policy or updated to standard levels.



COVER SUMMARY

Main Details

Business, company or partnership name	Quill Guardians Ltd
Address	Das House, Temple Back, Bristol, Somerset, United Kingdom, BS1 6NH
Main Business Trade	Insurance
Turnover (including Rental Income) £	£260,000
Total Wageroll	£130,000

Important - Please read
Please review your details and make sure everything is correct. Items displayed in red text have been automatically added or updated to standard levels.

← Back Contact Us → Save & Exit → Pay by Broker Account →

You can either select the back button to amend any details, save the quote or complete the quote by using the 'Pay by Broker Account' button. There is also an option to contact DAS.

Contacting DAS



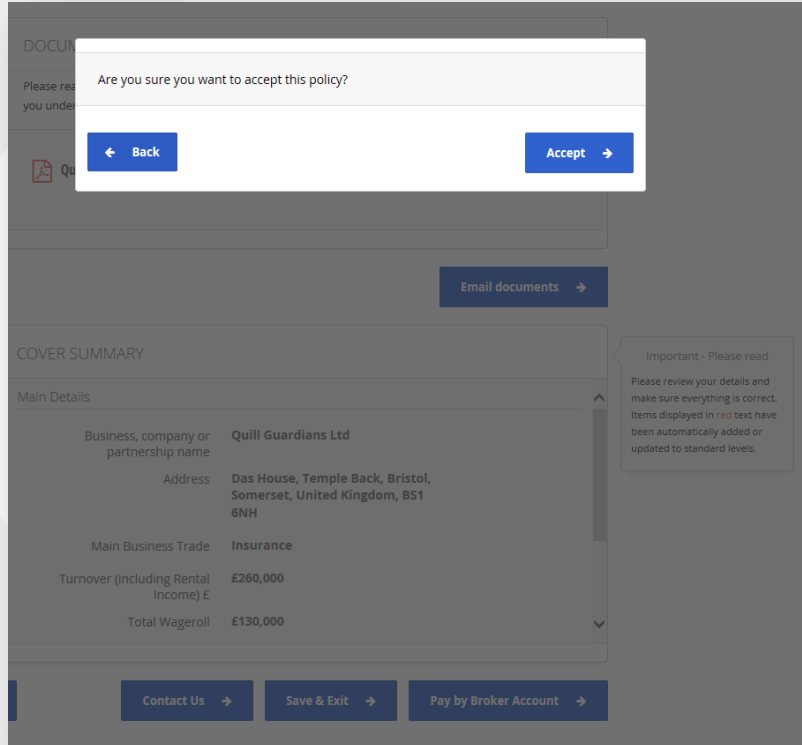
The screenshot shows the DAS 'FIRST FOR JUSTICE' website interface for a 'DAS Commercial Legal Expenses Quote'. The top navigation bar includes links for 'ADD CLIENT', 'FIND CLIENT', 'CHANGE PASSWORD', and 'LOG OUT'. Below this, it indicates the user is currently editing 'Quill Guardians Ltd' and shows 'Recent Clients'. The main content area is titled 'Contact us about this quote' and includes a note: 'If you have a questions or wish to discuss your quotation, please contact us on 0344 8939317 or complete the contact form below.' The form fields are: 'Contact name *' (empty, with a red 'REQUIRED' error message and a red 'X' icon), 'Contact email' (pre-filled with 'HANNAH.DAVIES@DAS.CO.UK'), 'Phone number *' (empty), and 'Please enter message *' (empty text area). A 'Brokerage' field is pre-filled with 'DAS Test Agent 1'. At the bottom of the form are 'Back' and 'Send' buttons. A '* mandatory field' note is visible in the top right corner of the form area.

If selecting the option to contact DAS you will need to enter your contact name, email, a contact phone number and a message outlining the reason for the enquiry.

You will then be contacted by a member of staff to assist with your query.



Quote Screen And Completion



Are you sure you want to accept this policy?

← Back Accept →

Email documents →

COVER SUMMARY

Important - Please read
Please review your details and make sure everything is correct. Items displayed in red text have been automatically added or updated to standard levels.

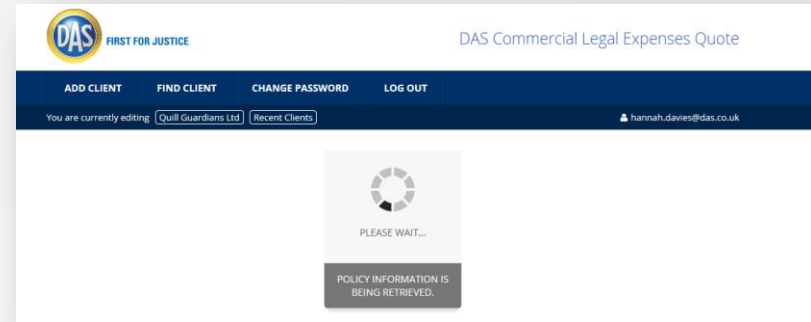
Main Details

Business, company or partnership name	Quill Guardians Ltd
Address	Das House, Temple Back, Bristol, Somerset, United Kingdom, BS1 6NH
Main Business Trade	Insurance
Turnover (including Rental Income) £	£260,000
Total Wageroll	£130,000

Contact Us → Save & Exit → Pay by Broker Account →

The system will ask if you are sure you want to accept the policy; should any last minute amendments be required this is an opportunity to action them.

If accepting the quote, you will be taken to a loading screen prior to the final confirmation screen.



DAS FIRST FOR JUSTICE DAS Commercial Legal Expenses Quote

ADD CLIENT FIND CLIENT CHANGE PASSWORD LOG OUT

You are currently editing Quill Guardians Ltd Recent Clients hannah.davies@das.co.uk

PLEASE WAIT...

POLICY INFORMATION IS BEING RETRIEVED.

Quote Screen And Completion



The screenshot shows the DAS Commercial Legal Expenses Policy quote screen. At the top left is the DAS logo with the tagline 'FIRST FOR JUSTICE'. The page title is 'DAS Commercial Legal Expenses Policy'. A navigation bar contains links for 'ADD CLIENT', 'FIND CLIENT', 'CHANGE PASSWORD', and 'LOG OUT'. Below this, it indicates the user is editing 'Quill Guardians Ltd' and 'Recent Clients', with the user email 'hannah.davies@das.co.uk'. The main content area features a policy summary box with the DAS logo, the title 'Your DAS Commercial Legal Expenses Policy', the effective dates 'Effective from 01/06/2018 to 31/05/2019', and the status 'This Policy is currently Accepted'. A callout box shows the 'Your Policy Reference' as 'Ref. ACT/LEG/000030'. Below this is a 'DOCUMENTATION' section with a download icon and a note: 'Please read through these documents to familiarise yourself with the cover being offered. It is important that you understand the **endorsements, exclusions and excesses** applicable to this policy before you proceed.' Three document icons are listed: 'Policy Schedule', 'Statement of Fact', and 'Policy Summary'. At the bottom, there are three buttons: 'Return to Client Summary' (left), 'Email documents' (right), and 'Amend Policy' (right).

Once the details have been retrieved you will be greeted with the confirmation screen.

There is still an opportunity to amend the policy details prior to issuing the documents.

If the information is correct, click on the email documents button which will send the documents on to yourself.

The email documents button will change to 'Email sent' to confirm they have been issued.

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Finding A Client



The screenshot shows the 'Find Client' interface in the DAS Connect system. At the top, there is a navigation bar with the DAS logo and the text 'FIRST FOR JUSTICE'. The main header area contains the text 'Welcome to DAS Connect' and a user profile for 'hannah.davies@das.co.uk'. Below this is a menu with options: 'ADD CLIENT', 'FIND CLIENT', 'CHANGE PASSWORD', and 'LOG OUT'. A 'Recent Clients' button is also visible. The main content area is titled 'Find Client' and contains a search form. The form has a 'Search on' dropdown menu currently set to 'Client name'. Below this is a text input field for 'Client name *', where the asterisk indicates a mandatory field. At the bottom of the form are two buttons: 'Search' and 'Clear'. The footer of the page contains regulatory information: 'DAS Legal Expenses Insurance Company Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority (FRN202106) and the Prudential Regulation Authority', a 'Privacy Notice' link, and 'Powered by Acturis - © Acturis Limited 2018'.

To find a pre-existing client, select 'Find Client' from the options bar at the top of the screen.


You can either search for the client by their name, their postcode, a quote reference number or their policy number.

This image is a close-up of the search dropdown menu from the 'Find Client' interface. It shows the 'Search on' label followed by a dropdown menu with four options: 'Client name', 'Client postcode', 'Quote reference', and 'Policy number'. Below the dropdown are two buttons: 'Search' and 'Clear'. The 'Client name' option is currently selected and highlighted in blue.



Finding A Client



 **FIRST FOR JUSTICE** Welcome to DAS Connect

ADD CLIENT **FIND CLIENT** **CHANGE PASSWORD** **LOG OUT**

[Recent Clients](#) hannah.davies@das.co.uk

* mandatory field

Find Client

Search on ✓

Client name* ✓

CLIENT NAME	CLIENT REFERENCE	CLIENT POSTCODE		
Quill Guardians Ltd	29798334	BS1 6NH	<input type="button" value="View Client"/>	<input type="button" value="New Quote"/>

View: 30
[Previous](#) | [Next](#)

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You can do a partial search on a name and it will generate and suggest any potential clients.

If you have saved a client's details on a previous quote, this will be the way to retrieve them.

Click 'View Client' to enter their record.



Finding A Client



Once the clients details have been retrieved you will be presented with a client page.

This will contain any quotes, policies, open adjustments and open renewals.

There is also an option to take out a new quote on the right hand side of the screen, just underneath the clients contact reference.

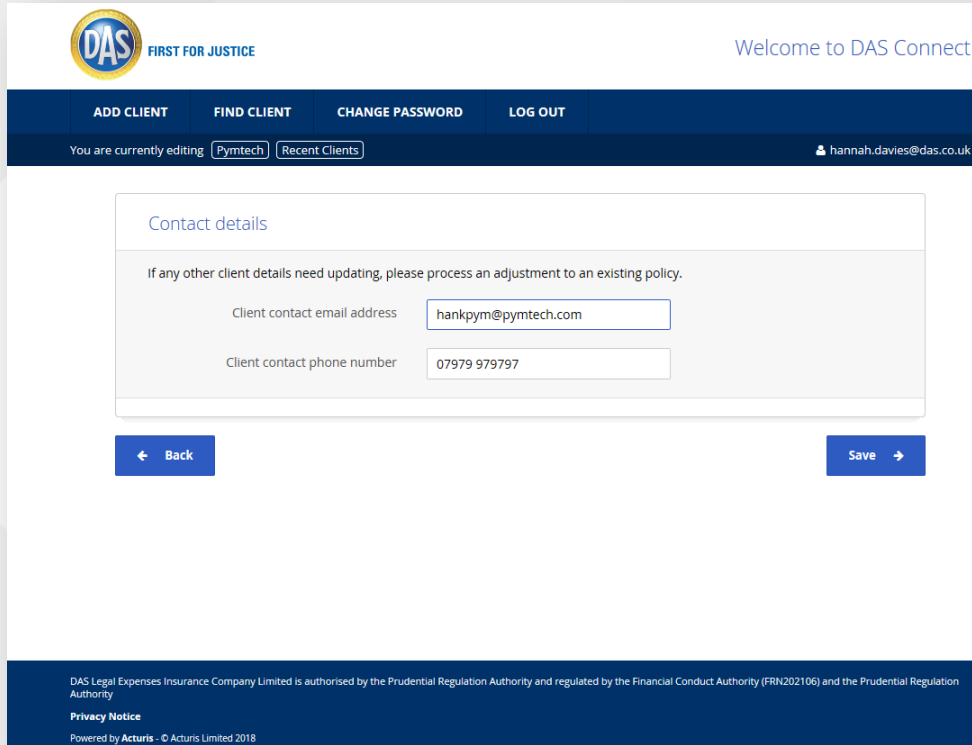
You can also update the clients contact details from here by clicking 'Edit contact details'.

A screenshot of the DAS First for Justice web application. The page title is 'Client Summary for Pymtech'. The navigation bar includes 'ADD CLIENT', 'FIND CLIENT', 'CHANGE PASSWORD', and 'LOG OUT'. Below the navigation bar, it shows 'You are currently editing: Pymtech | Recent Clients' and the user 'hannah.davies@dass.co.uk'. The main content area displays client contact information for 'Dr Hank Pym' and a table of quotes. The table has columns for 'PRODUCT', 'QUOTE REFERENCE', and 'PREMIUM'. One quote is listed: 'DAS Commercial Legal Expenses' with a quote reference of '254743766' and a premium of '£ 13841.79'. To the right of the table is a 'View' button and a plus icon. Below the table are three boxes: 'No open policies', 'No open adjustments', and 'No open renewals'. On the right side of the page, there is a profile card for 'Pymtech' with contact reference '29798992', and buttons for 'Edit contact details' and 'Get new quote'. The footer contains regulatory information and a privacy notice.

PRODUCT	QUOTE REFERENCE	PREMIUM
DAS Commercial Legal Expenses Quote effective from 08/05/2018	254743766	£ 13841.79



Editing A Clients Details



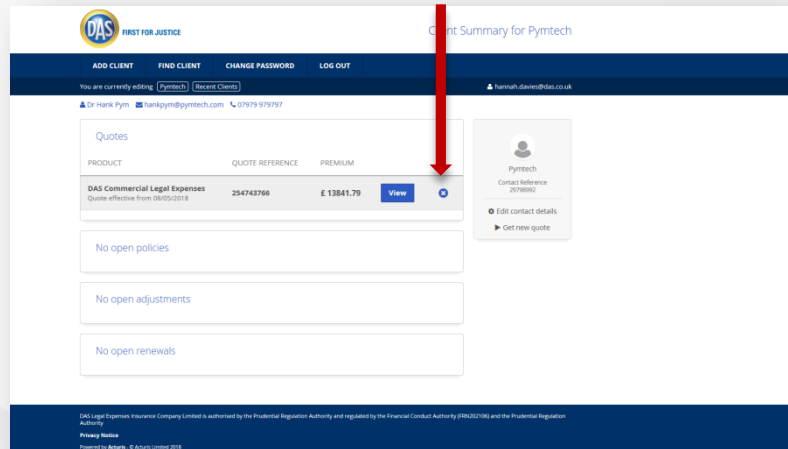
The screenshot shows the DAS Connect interface. At the top left is the DAS logo with the tagline 'FIRST FOR JUSTICE'. To the right, it says 'Welcome to DAS Connect'. Below this is a dark blue navigation bar with buttons for 'ADD CLIENT', 'FIND CLIENT', 'CHANGE PASSWORD', and 'LOG OUT'. Underneath the navigation bar, it indicates 'You are currently editing' with two tabs: 'Pymtech' (selected) and 'Recent Clients'. On the right of this bar, the user's email 'hannah.davies@das.co.uk' is displayed. The main content area is titled 'Contact details' and contains a message: 'If any other client details need updating, please process an adjustment to an existing policy.' Below this message are two input fields: 'Client contact email address' with the value 'hankpym@pymtech.com' and 'Client contact phone number' with the value '07979 979797'. At the bottom of the form area are two blue buttons: '← Back' on the left and 'Save →' on the right. The footer of the page contains legal information: 'DAS Legal Expenses Insurance Company Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority (FRN202106) and the Prudential Regulation Authority', 'Privacy Notice', and 'Powered by Acturis - © Acturis Limited 2018'.

If amending a client's details, you will only be able to amend the client's contact email address and contact phone number from this screen.

If any other client details require amending they will need to be adjusted in an existing policy.

Removing A Quote

In addition, you can also remove the client's historic quotes simply by clicking on the blue circle with a white cross after the quotes 'View' button.




Client Summary for Pymtech

ADD CLIENT FIND CLIENT CHANGE PASSWORD LOG OUT

You are currently editing: [Pymtech](#) [Recent Clients](#) hannah.davies@dss.co.uk

Dr Hank Pym hankpym@pymtech.com 07979 979797

PRODUCT	QUOTE REFERENCE	PREMIUM	
DAS Commercial Legal Expenses Quote effective from 08/05/2018	254743766	£ 13841.79	View 

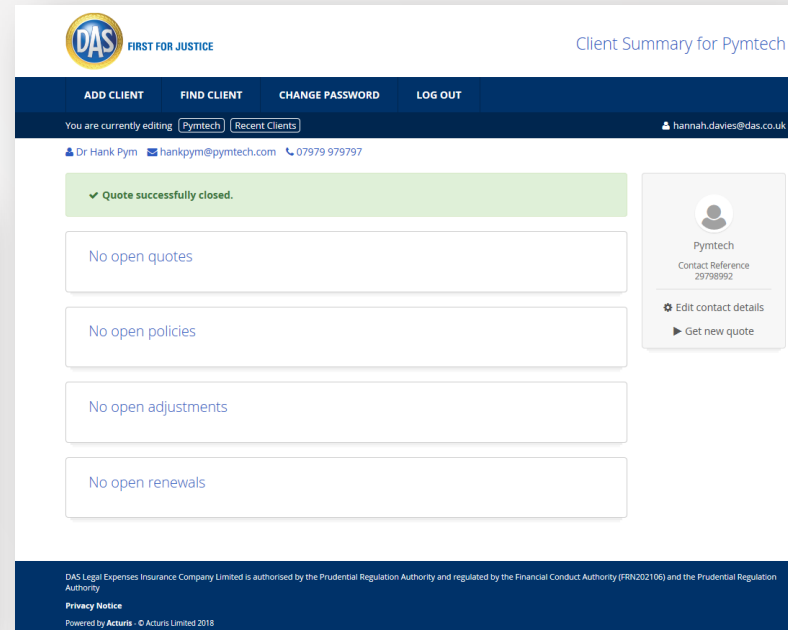
No open policies

No open adjustments

No open renewals

Pymtech
Contact Reference: 29798992
[Edit contact details](#)
[Get new quote](#)

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Client Summary for Pymtech

ADD CLIENT FIND CLIENT CHANGE PASSWORD LOG OUT

You are currently editing: [Pymtech](#) [Recent Clients](#) hannah.davies@dss.co.uk

Dr Hank Pym hankpym@pymtech.com 07979 979797

✓ Quote successfully closed.

No open quotes

No open policies

No open adjustments

No open renewals

Pymtech
Contact Reference: 29798992
[Edit contact details](#)
[Get new quote](#)

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Mid-Term Adjustments



ADD CLIENT FIND CLIENT CHANGE PASSWORD LOG OUT

Recent Clients hannah.davies@das.co.uk

* mandatory field

Find Client

Search on: Client name

Client name*: Hyd ✓

Search Clear

CLIENT NAME	CLIENT REFERENCE	CLIENT POSTCODE		
Hydra Inc	29864785	BS1 6NH	View Client	New Quote

View: 30
Previous | Next

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To make a mid-term adjustment (MTA) first select the 'Find Client' option in the top tool bar and search for the client.

Once you have found your client, click on 'View Client'.



Mid-Term Adjustments



You will arrive at a screen which has the clients policies.

From here you can make an adjustment, see any open adjustments, make a renewal or review open renewals, cancel a policy or review any open cancellations.

We will look at the renewal and cancellation process after reviewing the MTA process.

Click on 'View' to make a MTA.

The screenshot shows a web application interface for managing client policies. At the top, there are navigation links: 'ADD CLIENT', 'FIND CLIENT', 'CHANGE PASSWORD', and 'LOG OUT'. Below this, a header bar indicates the user is currently editing 'Hydra inc' and provides a 'Recent Clients' link. The user's email 'hannah.davies@das.co.uk' is displayed in the top right corner. The main content area shows the client details for 'Mr Johann Schmidt' with contact information 'redskull@hydra.com' and phone number '07414 141414'. A summary box indicates 'No open quotes'. Below this is a 'Policies' section with a table listing active policies. The table has columns for 'PRODUCT', 'POLICY NUMBER', and 'EXPIRY DATE'. One policy is listed: 'DAS Commercial Legal Expenses' with policy number 'ACT/LEG/000033' and expiry date '08/05/2019'. A 'View' button is next to this entry. Below the table are four summary boxes: 'No open adjustments', 'No open renewals', and 'No open cancellations'. On the right side, there is a user profile card for 'Hydra inc' with contact reference '29864785' and options to 'Edit contact details' and 'Get new quote'. At the bottom, a footer contains regulatory information: 'DAS Legal Expenses Insurance Company Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority (FRN202106) and the Prudential Regulation Authority'.


PRODUCT	POLICY NUMBER	EXPIRY DATE	
DAS Commercial Legal Expenses On cover from 09/05/2018	ACT/LEG/000033	08/05/2019	View



Mid-Term Adjustments

ADD CLIENT FIND CLIENT CHANGE PASSWORD LOG OUT

You are currently editing [Hydra Inc](#) [Recent Clients](#) hannah.davies@das.co.uk








Your DAS Commercial Legal Expenses Policy

Effective from 09/05/2018 to 08/05/2019
This Policy is currently Live

Your Policy Reference
Ref. ACT/LEG/000033

DOCUMENTATION

Please read through these documents to familiarise yourself with the cover being offered. It is important that you understand the **endorsements, exclusions and excesses** applicable to this policy before you proceed.

-  Policy Schedule
-  Statement of Fact
-  IPID
-  Policy Wording
-  Policy Summary

[Email documents](#) →

Historical policy versions

EVENT	PREMIUM	EFFECTIVE	EXPIRY
▶ New Policy (Live)	£ 1251.82	09/05/2018	08/05/2019

[← Client Summary](#) [Cancel Policy](#) → [Amend Policy](#) →

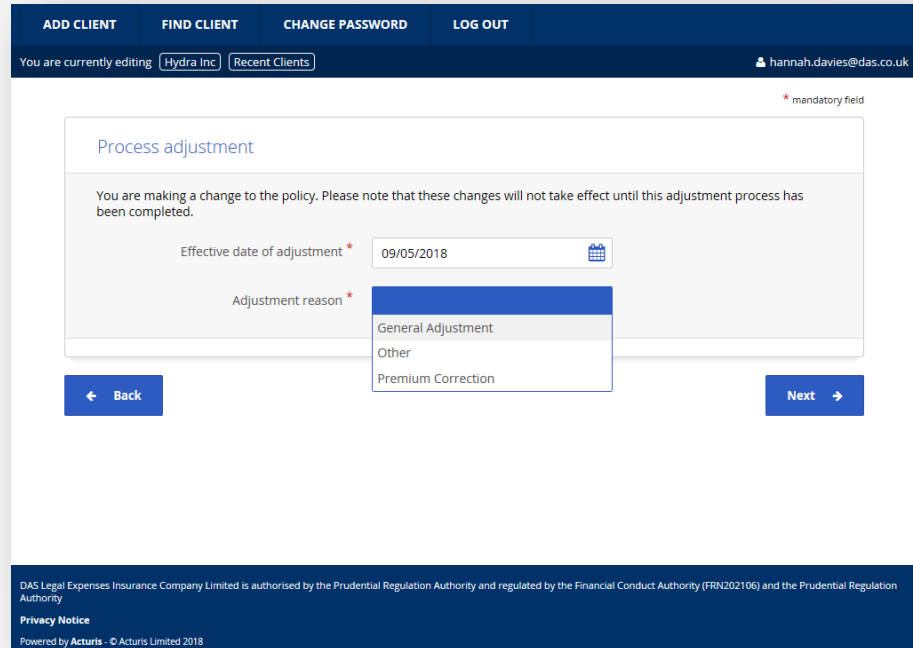
Once the policy has been selected, click on the 'Amend Policy' button.

Mid-Term Adjustments

You will need to enter the date the client wished the policy adjustment to take place from and select a reason for the required adjustment.

Both of these are required fields; if entered correctly a green tick will appear next to the adjustment reason.

Now click on 'Next'.



ADD CLIENT FIND CLIENT CHANGE PASSWORD LOG OUT

You are currently editing Hydra Inc Recent Clients

hannah.davies@das.co.uk

* mandatory field

Process adjustment

You are making a change to the policy. Please note that these changes will not take effect until this adjustment process has been completed.

Effective date of adjustment * 09/05/2018

Adjustment reason *

- General Adjustment
- Other
- Premium Correction

← Back Next →

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Mid-Term Adjustments

YOUR DETAILS RISK DETAILS YOUR QUOTE

* mandatory field

Client details

Client name *

Legal trading status *

Title (client primary contact) *

First name (client primary contact) *

Surname (client primary contact) *

Client correspondence postcode * [Look up address](#) ⓘ

Das House, Temple Back, Bristol,
Somerset, United Kingdom, BS1 6NH

[EDIT ADDRESS](#)

You are making a change to the policy. Please note that these changes will not take effect until this adjustment process has been completed.

Effective date of adjustment * ⓘ

[← Back](#) [Next →](#)

The first screen will allow you the option of updating the client details.

If the MTA is for the clients address, this is where you will make the adjustment. You will see an 'Edit Address' option in blue below the clients address.

Mid-Term Adjustments

ADD CLIENT FIND CLIENT CHANGE PASSWORD LOG OUT

You are currently editing [Haydra Inc](#) [Recent Clients](#) hannah.davies@daz.co.uk

YOUR DETAILS RISK DETAILS YOUR QUOTE

Business Details

Main Business Trade*

Business Description*

Total number of directors, employees* and sub-contractors in your business (including yourself)

Total Wageroll*

Turnover (including Rental Income)*

Total Rental Income from Commercial Premises*

Total Rental Income from Residential Premises*

Combined Total

How many legal disputes, prosecutions* (excluding motoring offences) and tax enquires from HMRC has the business had in the last 5 years?

Regardless of whether you amend the address, the next screen will give you the option to adjust the customer's business details, cover options and declarations.

Check the details are correct and click 'Next' to continue the MTA.

Cover Options

Limit of indemnity*

The following covers are included:

- Legal advice
- Counselling service
- Tax advice
- DASbusinesslaw
- DAS employment manual

Declarations

Has the business ever had legal expenses insurance cancelled, been refused legal expenses insurance or had special conditions imposed? Yes No

Are you aware of any circumstances that may rise to a claim? Yes No

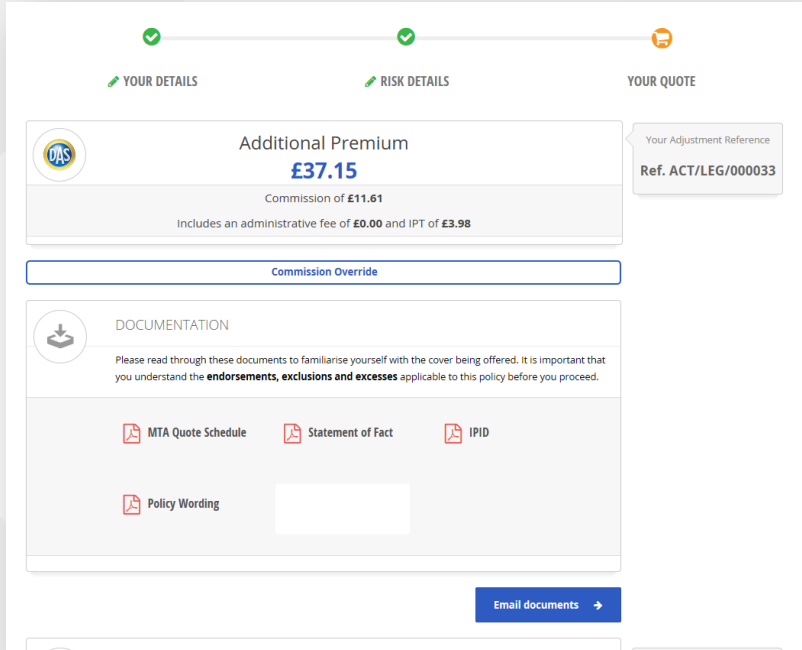
Has the business been taken over, merged with, acquired or disposed of any companies or significant business activities in the last 3 years, or are any currently under consideration? Yes No

Has any proposer, director or partner of the Trade or Business or its Subsidiary Companies ever, either personally or in any business capacity had any convictions or criminal offences which are not spent under the Rehabilitation of Offenders Act or has any prosecutions pending? Yes No

Has any proposer, director or partner of the Trade or Business or its Subsidiary Companies ever, either personally or in any business capacity been declared bankrupt or insolvent or been the subject of bankruptcy proceedings or insolvency proceedings? Yes No

[← Back](#) [Save & Exit →](#) [Next →](#)

Mid-Term Adjustments



The screenshot shows a web interface for a quote adjustment. At the top, there are three progress indicators: 'YOUR DETAILS' (green checkmark), 'RISK DETAILS' (green checkmark), and 'YOUR QUOTE' (orange speech bubble). Below this, the 'YOUR QUOTE' section displays the DAS logo, 'Additional Premium £37.15', and 'Commission of £11.61'. A note states: 'Includes an administrative fee of £0.00 and IPT of £3.98'. A 'Commission Override' button is visible. To the right, a callout box shows 'Your Adjustment Reference Ref. ACT/LEG/000033'. Below this is a 'DOCUMENTATION' section with a download icon and a note: 'Please read through these documents to familiarise yourself with the cover being offered. It is important that you understand the **endorsements, exclusions and excesses** applicable to this policy before you proceed.' There are four document icons: 'MTA Quote Schedule', 'Statement of Fact', 'IPID', and 'Policy Wording'. A blue button at the bottom right says 'Email documents →'.

Once the adjustment has been actioned any additional premium will be confirmed. If there are any issues with the amendment you will be directed to contact DAS.

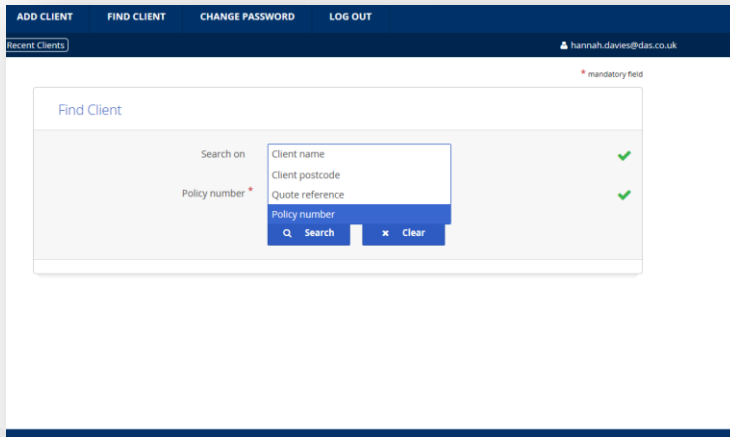
There is an option here to email yourself a copy of the quote with the amendments included. The bottom of the screen will provide a summary of the cover.

The bottom of the screen will have the options to save the quote, pay, contact DAS or continue to make further adjustments.

If you're happy with the adjustment, click to pay by broker account and the policy will be adjusted. At this point you can issue new documents.

Renewals

To invite a renewal firstly search for the customer by selecting the 'Find Client' option at the top of the screen. Then you can search by either the customer's name, postcode, quote reference or policy number.



ADD CLIENT FIND CLIENT CHANGE PASSWORD LOG OUT

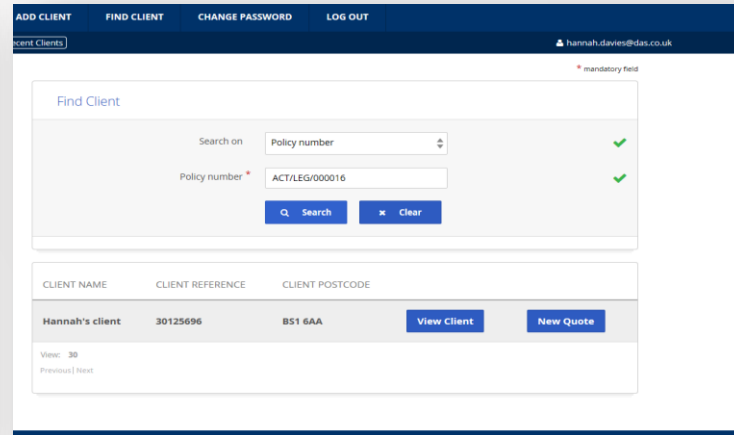
Recent Clients hannah.davies@das.co.uk

Find Client

Search on

- Client name ✓
- Client postcode
- Quote reference ✓
- Policy number *

Q Search x Clear



ADD CLIENT FIND CLIENT CHANGE PASSWORD LOG OUT

Recent Clients hannah.davies@das.co.uk

Find Client

Search on Policy number ✓

Policy number * ACT/LEG/000016 ✓

Q Search x Clear

CLIENT NAME	CLIENT REFERENCE	CLIENT POSTCODE		
Hannah's client	30125696	BS1 6AA	View Client	New Quote

View: 30
Previous | Next

Once you have found your customer, click on the 'View Client' button.

Renewals



ADD CLIENT FIND CLIENT CHANGE PASSWORD LOG OUT

You are currently editing Hannah's Client | Contact Clients | Hannah.Davies@das.co.uk

Mrs test test | Not provided | Not provided

No open quotes

Hannah's client
Contact Reference: 3022966
E66 contact details
Get new quote

Policies

PRODUCT	POLICY NUMBER	EXPIRY DATE	
DAS Commercial Legal Expenses On cover from 01/06/2017	ACT/LEG/000016	31/05/2018	View
DAS Commercial Legal Expenses On cover from 15/05/2018	ACT/LEG/000012	14/05/2019	View

Adjustments

PRODUCT	POLICY NUMBER	
DAS Commercial Legal Expenses On cover from 31/05/2018 (Accip988)	ACT/LEG/000012	View

No open renewals

No open cancellations

Once the correct customer has been selected all of their policies will be showing; live policies, adjustments, renewal and cancellations.

Select the policy to renew and click on the 'Invite Renewal' button.

Your DAS Commercial Legal Expenses Policy
Effective from 01/06/2017 to 31/05/2018
This Policy is currently Live
Your Policy Reference: Ref. ACT/LEG/000016

DOCUMENTATION

Please read through these documents to familiarise yourself with the cover being offered. It is important that you understand the **endorsements, exclusions and excesses** applicable to this policy before you proceed.

- Policy Schedule
- Statement of Fact
- IPID
- Policy Wording

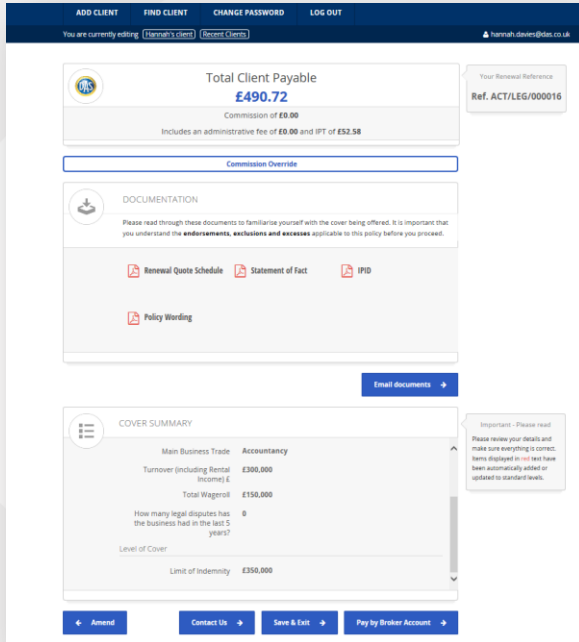
[Email documents](#)

Historical policy versions

EVENT	PREMIUM	EFFECTIVE	EXPIRY
New Policy (Live)	£ 490.72	01/06/2017	31/05/2018

[Client Summary](#) | [Cancel Policy](#) | [Invite Renewal](#) | [Amend Policy](#)

Renewals



ADD CLIENT FIND CLIENT CHANGE PASSWORD LOG OUT
You are currently editing Hannah's client Select Client | hannah.davies@das.co.uk

Total Client Payable
£490.72
Commission of £0.00
Includes an administrative fee of £0.00 and IPT of £52.58

Your Renewal Reference
Ref. ACT/LEG/000016

Commission Override

DOCUMENTATION
Please read through these documents to familiarise yourself with the cover being offered. It is important that you understand the **endorsements, exclusions and excesses** applicable to this policy before you proceed.

- Renewal Quote Schedule
- Statement of Fact
- IPID
- Policy Wording

Email documents →

COVER SUMMARY

Main Business Trade	Accountancy
Turnover (including Rental Income) £	£300,000
Total Wageroil	£150,000

How many legal disputes has the business had in the last 5 years?
0

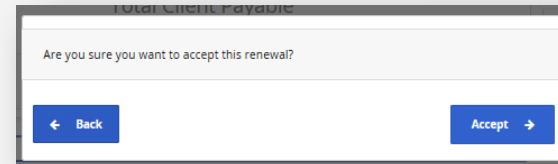
Level of Cover
Limit of indemnity £350,000

Important - Please read
Please review your details and make sure everything is correct. Items displayed in red text have been automatically added or updated to standard levels.

← Amend | Contact Us → | Save & Exit → | Pay by Broker Account →

You will then have the option to review the renewal and make any adjustments. Once these have been made you will arrive at the quote screen. Now you will have the option to either save the renewal, accept the renewal (by selecting 'Pay The Broker Account') or alternatively continue to make further amends by clicking on the appropriate button at the bottom of the screen.

If accepting the renewal, once you click on the 'Pay The Broker Account' button a pop up will ask you to confirm you are happy to proceed.



Total Client Payable

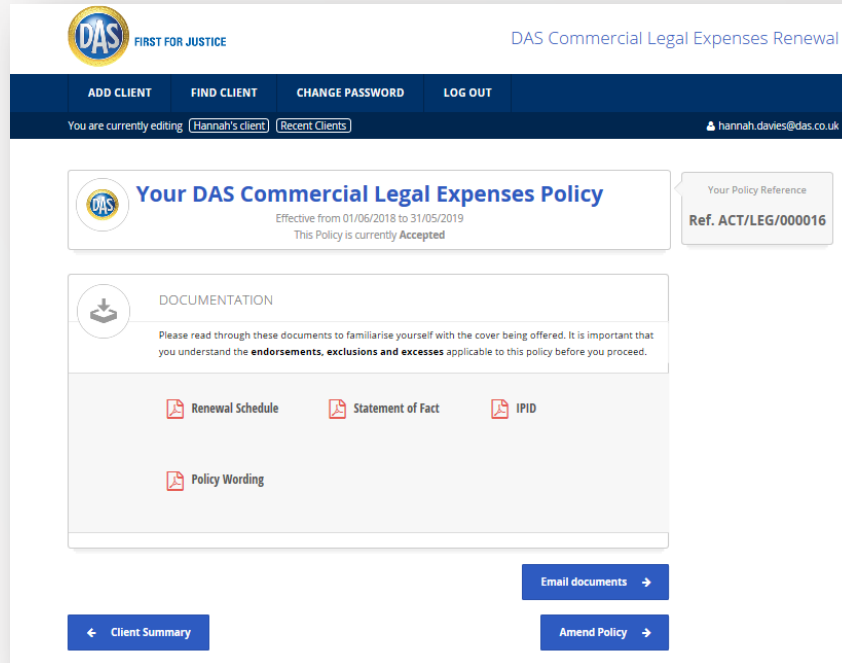
Are you sure you want to accept this renewal?

← Back | Accept →

Renewals

Once accepted the renewal will be updated. Make sure confirmation documents are sent to you by clicking on 'Email Documents'.

The renewal has now been actioned.



The screenshot shows the DAS Commercial Legal Expenses Renewal interface. At the top left is the DAS logo with the tagline "FIRST FOR JUSTICE". The page title is "DAS Commercial Legal Expenses Renewal". A navigation bar contains buttons for "ADD CLIENT", "FIND CLIENT", "CHANGE PASSWORD", and "LOG OUT". Below this, it indicates the user is editing "Hannah's client" and shows "Recent Clients". The user's email is "hannah.davies@das.co.uk".

The main content area features a box titled "Your DAS Commercial Legal Expenses Policy" with a sub-header "Effective from 01/06/2018 to 31/05/2019" and a status "This Policy is currently Accepted". A "Your Policy Reference" box shows "Ref. ACT/LEG/000016".

Below this is a "DOCUMENTATION" section with a download icon and a note: "Please read through these documents to familiarise yourself with the cover being offered. It is important that you understand the **endorsements, exclusions and excesses** applicable to this policy before you proceed." A list of documents is shown: "Renewal Schedule", "Statement of Fact", "IPID", and "Policy Wording".

At the bottom, there are three buttons: "Client Summary" (with a left arrow), "Email documents" (with a right arrow), and "Amend Policy" (with a right arrow).

Cancellations



The screenshot shows the DAS Connect web application interface. At the top left is the DAS logo with the tagline 'FIRST FOR JUSTICE'. The header text reads 'Welcome to DAS Connect'. A navigation bar contains buttons for 'ADD CLIENT', 'FIND CLIENT', 'CHANGE PASSWORD', and 'LOG OUT'. Below this is a 'Recent Clients' button and a user profile indicator for 'hannah.davies@das.co.uk'. The main content area is titled 'Find Client' and includes a search form with a dropdown menu set to 'Client name' and a text input field containing 'QUILL'. A green checkmark is visible next to the input field. Below the search form is a table of search results:

CLIENT NAME	CLIENT REFERENCE	CLIENT POSTCODE		
Quill Guardians Ltd	29798334	BS1 6NH	View Client	New Quote

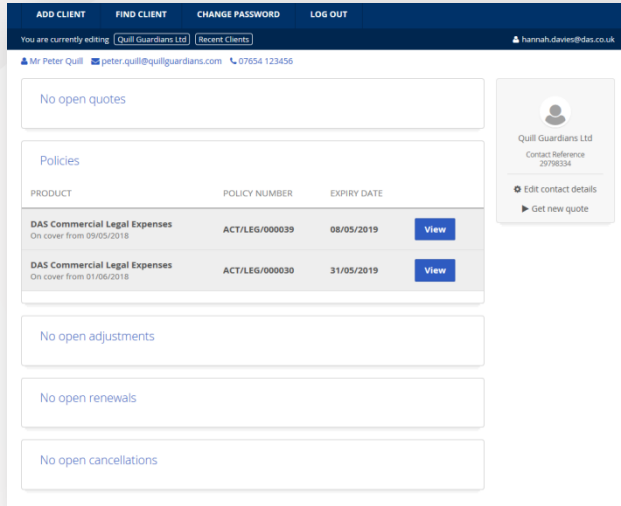
Below the table, it shows 'View: 30' and navigation links for 'Previous' and 'Next'. At the bottom of the page, there is a footer with legal information: 'DAS Legal Expenses Insurance Company Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority (FRN202106) and the Prudential Regulation Authority', a 'Privacy Notice' link, and 'Powered by Acturis - © Acturis Limited 2018'.

To cancel a client policy, first do a search for the client via the Find Client tab.

Once you have found the client, click on 'View Client'.



Cancellations

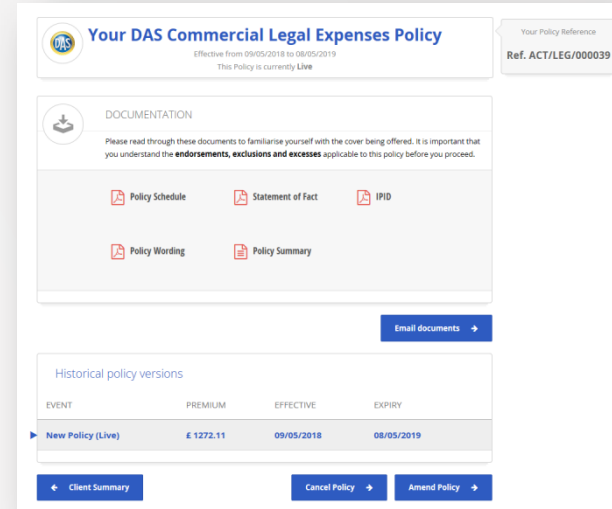


The screenshot shows the DAS client portal interface. At the top, there are navigation links: ADD CLIENT, FIND CLIENT, CHANGE PASSWORD, and LOG OUT. Below this, it indicates the user is currently editing 'Quill Guardians Ltd' and provides a 'Recent Clients' link. The user's name, email, and phone number are displayed. A 'No open quotes' message is shown. The 'Policies' section contains a table with two entries:

PRODUCT	POLICY NUMBER	EXPIRY DATE	
DAS Commercial Legal Expenses On cover from 09/05/2018	ACT/LEG/000039	08/05/2019	View
DAS Commercial Legal Expenses On cover from 01/06/2018	ACT/LEG/000030	31/05/2019	View

Below the table are sections for 'No open adjustments', 'No open renewals', and 'No open cancellations'. A sidebar on the right shows the client profile for 'Quill Guardians Ltd' with contact details and options to edit or get a new quote.

The screen now shows any live policies, select the policy you want to cancel by clicking on 'View'.



The screenshot shows the 'Your DAS Commercial Legal Expenses Policy' screen. It includes the DAS logo, the policy title, and the effective dates (09/05/2018 to 08/05/2019). A 'Your Policy Reference' box shows 'Ref. ACT/LEG/000039'. The 'DOCUMENTATION' section contains a list of documents: Policy Schedule, Statement of Fact, IPID, Policy Wording, and Policy Summary. An 'Email documents' button is present. The 'Historical policy versions' section contains a table:

EVENT	PREMIUM	EFFECTIVE	EXPIRY
New Policy (Live)	£ 1272.11	09/05/2018	08/05/2019

At the bottom, there are buttons for 'Client Summary', 'Cancel Policy', and 'Amend Policy'.

You will now be in the policy screen. Click on the 'Cancel Policy' button in the bottom centre of the screen to cancel the policy.