



WEBroker Dashboard



BROKER TRAINING GUIDE

**How to Navigate Your
Voyager WEBroker Dashboard**

How to Navigate Your Voyager WEBroker Dashboard

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1 This is your Voyager WEBroker Dashboard.

HOME ▾ QUOTE AND BUY ▾ REPORTS ▾ ADMINISTRATION ▾ HELP ▾ ACCOUNT ▾

Call our Travel Insurance Broker Support Team on [+44 \(0\) 1483 562 662](tel:+44(0)1483562662)
or our Home Insurance Broker Support Team on [+44 \(0\) 1483 806 815](tel:+44(0)1483806815)
or email enquiries@voyagerins.com

Find a Policy: Certificate Number: Find Surname: Find Postcode: Find

Click on the product tiles below for the product you wish to generate a quote for!

Policies Available For Key:  UK Residents  EU Residents  Worldwide Residents



VOYAGER PLUS
TRAVEL INSURANCE



ABLE2TRAVEL



INSURATRIP



HIGH RISK VOYAGER



VOYAGERPROTECT



EUROPEAN BREAKDOWN



WEDDING INSURANCE



FRESH START
HOME INSURANCE



INSURAHOME

2 The tiles show the various Voyager Insurance products available to our brokers.

Call our Travel Insurance Broker Support Team on [+44 \(0\) 1483 562 662](tel:+44(0)1483562662)
or our Home Insurance Broker Support Team on [+44 \(0\) 1483 806 815](tel:+44(0)1483806815)
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Find a Policy: Certificate Number: Find Surname: Find Postcode: Find

Click on the product tiles below for the product you wish to generate a quote for!

Policies Available For Key:  UK Residents  EU Residents  Worldwide Residents



The image shows a grid of six product tiles, each with a small UK flag icon in the top right corner. The tiles are arranged in two rows of three. The first row contains: 'VOYAGER PLUS TRAVEL INSURANCE' (beach scene), 'HIGH RISK VOYAGER' (person with camera), and 'VOYAGERPROTECT' (business meeting). The second row contains: 'FRESH START HOME INSURANCE' (family), and 'INSURAHOME' (house). A red arrow points to the 'EUROPEAN BREAKDOWN' tile, which is partially obscured by the red border of the image.

3 The policy key will show you who the products are available to, either UK Residents, EU Residents, or Worldwide Residents.

Find a Policy: Certificate Number: Find Surname: Find Postcode: Find

Click on the product tiles below for the product you wish to generate a quote for!

Policies Available For Key:  UK Residents  EU Residents



4

When you 'click' a product tile you can view a snapshot of the product.

Find a Policy: Certificate Number: Find Surname: Find Postcode: Find

Click on the product tiles below for the product you wish to generate a quote for!

Policies Available For Key:  UK Residents

 EU Residents



IMPORTANT INFORMATION - PLEASE READ

IMPORTANT INFORMATION REGARDING VOYAGER PLUS TRAVEL INSURANCE & COVID-19 / CORONAVIRUS

This policy will **ONLY** provide cover for claims directly or indirectly related to a pandemic and/or epidemic, including but not limited to Coronavirus (COVID-19) within the following sections:

Section 1.2 - Cancellation cover as a result of COVID-19

Section 2 - Emergency Medical Expenses & Repatriation

Please be aware that the coverage provided under Section 1.2 - Cancellation cover as a result of COVID-19, applies if it is necessary and unavoidable to cancel your planned trip. You are covered, notwithstanding General Exclusions 30 and 31, for cancellation as a result of an insured person testing positive for COVID-19 within 14 days of the trip departure date, or an insured person being admitted to hospital due to testing positive for COVID-19 within 28 days of the trip departure date.

Quote me for:

SHORT STAY ▶

ANNUAL ▶

LONG STAY ▶

5 Product Snapshot - Here you will see key policy features.



Quote me for:

SHORT STAY ▶

ANNUAL ▶

LONG STAY ▶

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Section 1.2 - Cancellation cover as a result of COVID-19 does not provide cover for any claim relating to coronavirus (COVID-19):

- for any claims for curtailment of the trip due to COVID-19;
- if you are advised to quarantine or you choose to self-isolate due to a person you have come into contact with having COVID-19;
- if a medical professional advises you not to travel as you have underlying health conditions that place you 'at a higher risk' from COVID-19;
- if the Foreign, Commonwealth & Development Office (FCDO) advise against all (or all but essential) travel to your intended destination;
- if local government restrictions or directives prohibiting or restricting entry (for example, self isolation, quarantine or lockdown measures) to your intended destination or on your return home;
- for any costs of COVID-19 testing;
- for any claim where a relative, travelling companion or close business colleague not insured on the policy contracts or shows symptoms of COVID-19.

For Section 2 - Emergency Medical Expenses, cover is now available for your chosen level of cover for the necessary costs incurred as a result of you sustaining unexpected symptoms of or testing positive for COVID-19 or death during your trip in respect of: additional travel and accommodation expenses (on a bed & breakfast basis) to enable you to return home if you are unable to travel as originally planned. A maximum amount of £2,000 per insured person applies if you have to extend your trip because you have tested positive for COVID-19 as well as additional travel and accommodation expenses (on a bed & breakfast basis) for a travelling companion to stay with you and accompany you home, or a relative or friend to travel from your home country to stay with you and accompany you home.

There is no cover under **ALL** other sections of cover for any claims directly or indirectly related to a pandemic and/or epidemic including but not limited to Coronavirus (COVID-19).

For full details, please see your policy wording.

TRAVEL DESTINATIONS

PLEASE REMEMBER: It is essential that you check the latest advice outlined by the Foreign, Commonwealth and Development Office (FCDO) at www.gov.uk/foreign-travel-advice before departure. Our policies will NOT provide cover under any section of the policy if you travel to a country or specific area, where prior to travel, the FCDO are advising against all (or all but essential) travel.

Product Features:

- Choice of 3 levels of cover; Standard, Prime and Black
- Available to UK and EEA Residents
- Premiums and benefits available in E/C
- Already Departed cover available
- No age Limit on Single Trip policies
- ...And much more!

Summary Benefits Schedule:

Section of Cover	Level of Cover		
	Standard up to	Prime up to	Black up to
Cancellation or Curtailment	£1,000	£5,000	£10,000
Emergency Medical Expenses	£5 Million	£10 Million	£10 Million
Baggage	£1,250	£2,500	£3,500
Personal Money	£750	£1,250	£1,500
Missed Departure/Journey Disruption	£250	£750	£1,000
Holiday Financial Protection	Nil	£1,500	£3,000

...and much more! Please refer to the policy wording for full Benefits Schedule

Durations:

- Short Stay up to 62 days per trip if aged up to 74 (max. 31 days for ages 75-84 areas 3 & 4 only and 31 days if aged 85 and over for all areas).
- Annual Multi-Trip up to 45 days per trip if aged 18-69 and 31 days if aged 70-74.
- Long Stay up to 18 months available if aged up to 59 (24 months on referral).

Policy Features:

- Family members can travel separately on Annual Multi-Trip policies.
- Up 21 Days Wintersports cover included on Annual Multi-Trip policies.
- Option on Annual Multi-Trip policies to extend from 45 days to 62 days per trip if aged 18-69.

6 Product Snapshot - Here you will see policy documents.

* Please note these policy documents are for the current products – current and expired policies may have different policy documents that were effective at the date of purchase.

Policy Docs:

FACT SHEET ▶ WORDING ▶
IPID ▶

- Action and Action + Activities
- Gadget Cover
- Business Plus Cover
- Sports Equipment & Cycles
- ...and more!

Important Information Regarding Scuba Diving:

Scuba Diving on Leisure Activities (included automatically in Voyager Plus Policies) is now to a maximum depth of 15 metres.

If you need cover to dive to a maximum depth of 30 metres, you will need to select and pay the additional premium for Action Activities. If you need cover to dive to a maximum depth of 40 metres, you will need to select and pay the additional premium for Action Plus Activities.

Our policies will also no longer provide cover for claims directly or indirectly related to Scuba Diving in Cyprus.

Enhanced Travel or Terrorism Disruption and Section 21 - Cruise Plus Insurance

As a result of the COVID 19 pandemic, Enhanced Travel or Terrorism Disruption and section 21 - Cruise Plus are currently unavailable to purchase.

7 Policy Documents – Click here to view current product policy wording.

Policy Documents – Click here to view current product ‘Fact Sheet.’

Policy Documents – Click here to view current product ‘IPID.’

Policy Docs:



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- ...and more!

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- 8 You can open multiple product ‘snapshots’ at a time. To close a product ‘snapshot’ simply click ‘close’ in the upper right-hand corner of the ‘snapshot’ area for a particular product.

Voyager Plus Travel Insurance

[Close](#)



VOYAGER PLUS
TRAVEL INSURANCE

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Quote me for:

SHORT STAY ▶

ANNUAL ▶

LONG STAY ▶

9

Searching for existing policy-The first option is to search from your dashboard home page.

You can search for a policy by the following: policy number, surname, or postcode

→ Enter search criteria in one of the boxes and click “Find”

Find a Policy: Certificate Number: Find Surname: Find Postcode: Find

Click on the product tiles below for the product you wish to generate a quote for!

Policies Available For Key:  UK Residents  EU Residents



10 The second option is to go to the “Reports” tab and then “Find a Policy”.
You will have additional search criteria you can search by on this page.

→ Searching by ‘period’ or ‘month’ can give you a nice snapshot to see your activity for a particular time period.

HOME ▾ QUOTE AND BUY ▾ **REPORTS ▾** ADMINISTRATION ▾ HELP ▾ ACCOUNT ▾

Find Policies	Invoicing/ Credit Control	Renewals
Find a Policy V3	Invoices	Annual Renewals
Summary		Renewals Summary
Retail Quote Report		
Commercial Quote Report		

HOME ▾ QUOTE AND BUY ▾ **REPORTS ▾** ADMINISTRATION ▾ HELP ▾ ACCOUNT ▾

PURCHASE DATE ▾ start date to end date or select a month ▾ All Products ▾ 🔍

- PURCHASE DATE**
- START DATE
- NAME
- POLICY NUMBER
- SCREENING REFERENCE
- POSTCODE
- EMAIL ADDRESS
- P11D REPORT

11

Policies will be listed and colour-coded to show status i.e., if the policy has expired.

Filter									
PURCHASE DATE									
27-05-2022 to 27-05-2022 or select a month									
All Products									
Download									
PolicyID	ScreeningID	PurchasedTime	State	SoldBy	Product	Price	Surname	Address	
4154119	0	27/05/2022 10:02:08	New	Terracotta Test (Vis Uat New M...	Voyager Plus Travel Insurance ...	£43.48	Brendon	Test	
4154120	0	27/05/2022 10:26:20	New	Terracotta Test (Vis Uat New M...	Voyager Plus Travel Insurance ...	£217.39	Jones	Test	

12

To see policy details, click the plus icon on the right-hand side.

➔ A window will open with all the policy information.

Scroll down to see the information.



4154119	0	27/05/2022 10:02:08	New	Terracotta Test (Vis Uat New M...	Voyager Plus Travel Insurance ...	£43.48	Brendon	Test	+	≡	📄	📧	📄	📄	📄	📄	📄
---------	---	---------------------	-----	--------------------------------------	--------------------------------------	--------	---------	------	---	---	---	---	---	---	---	---	---

4154119	0	27/05/2022 10:02:08	New	Terracotta Test (Vis Uat New M...	Voyager Plus Travel Insurance ...	£43.48	Brendon	T	+	≡	📄	📧	📄	📄	📄	📄	📄
---------	---	---------------------	-----	--------------------------------------	--------------------------------------	--------	---------	---	---	---	---	---	---	---	---	---	---

Policy Price:

- Net To Wholebroker - 25.35
- Agent Comm - 10.87
- IPT - 7.25
- Total Premium - 43.48
- Silent Agent Comm - 0.00

Insured People:

- Mrs Charlotte Brendon, 15/07/1981, 40

Policy Details:

- Residence - United Kingdom
- Policy Type - Standard Short Stay
- Destination - Area 2: Europe, Channel Islands, Canary Islands, Isle Of Man, Madeira & Iceland
- Dates - 28/May/2022 To 11/June/2022
- Package Type - Individual(S)
- Additional Covers - Section 20. Gadget Insurance

Main Insured Details:

- Address - Test
- Email Address - R@R.Com
- Telephone - 07846598798
- Main Country Of Destination -
- Fiscal Code -
- Italian Residents -

13 File notes – You can use this feature however you like, it's a free text box you can type notes in.

- ➔ Note Visibility – chose if the note will show on the certificate or not.
- ➔ Once you click the “Save Changes” button the note will show.
- ➔ Click on a note to make changes – click “Save Changes” when done.
- ➔ Notes you select to be visible on the certificate will show at the bottom once you have saved the note and/or changes made.

The screenshot shows a policy details page for 'Terracotta Test (Vis Uat)'. The page is divided into several sections: 'Policy Price', 'Policy Details', 'Insured People', 'Main Insured Details', and 'History'. A red arrow points to the 'File Notes' icon in the top right toolbar.

Section	Item	Value
Policy Price:	Net To	- 126.81
	Wholebroker	
	Agent Comm	- 54.35
	IPT	- 36.23
	Total Premium	- 217.39
Silent Agent Comm	- 0.00	
Policy Details:	Residence	- United Kingdom
	Policy Type	- Prime Annual Multi-Trip
	Destination	- Area 4: Worldwide Including North America
	Dates	- 27/May/2022 To 26/May/2023
	Package Type	- Couple
Insured People:	Mr Peter Jones, 14/08/1983, 38	
	Mrs Samantha Jones, 12/07/1992, 29	
Main Insured Details:	Address	- Test
	Email Address	- S@S.Com
	Telephone	- 07984657891
	Main Country Of Destination	
	Fiscal Code	- Italian Residents Only
NIF "Portuguese Residents Only"		
History:	[27/May/2022] - New, 217.39 (Manual Payment)	
	Done By - Terracotta Test (VIS UAT NEW MENU)	

The screenshot shows the 'POLICY NOTES' form. It includes a text input field for 'Note Text', radio buttons for 'Note Visibility' (Showed on Certificate and Not Shown on Certificate), and a 'Save Changes' button. A red arrow points to the 'Note Text' field, and another red arrow points to the 'Save Changes' button.

Form Fields:

- ADD NEW NOTE
- Note Text: [Text Input Field]
- Note Visibility:
 - Showed on Certificate
 - Not Shown on Certificate
- Note Properties:
 - Created by: -
 - Created on: -
- Show: [Show All] [Order by: Date]
- Save Changes

14

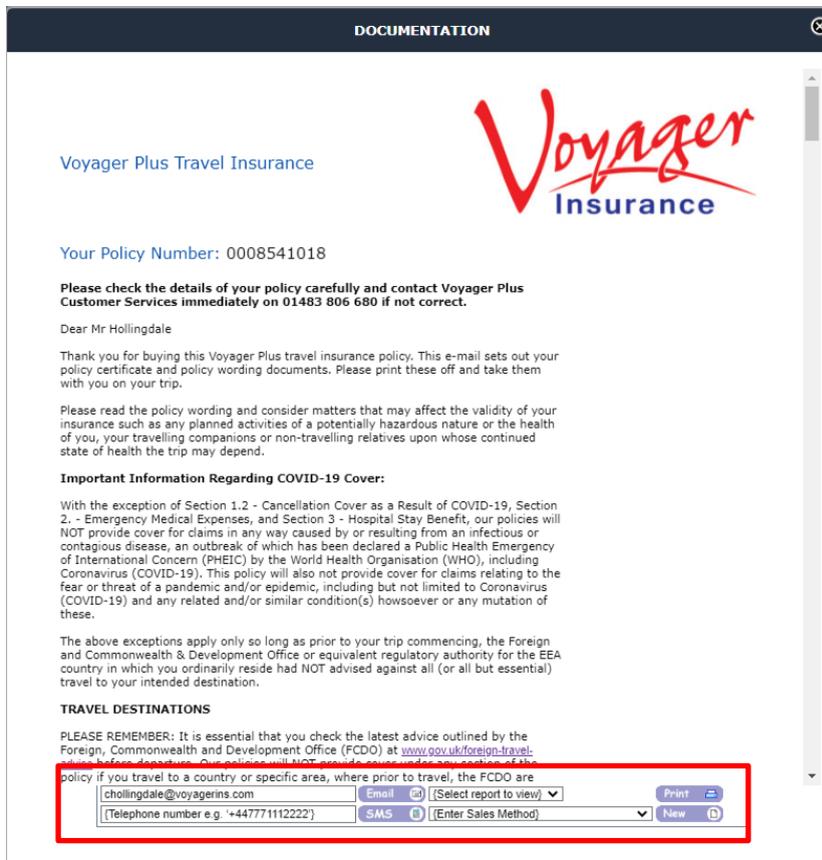
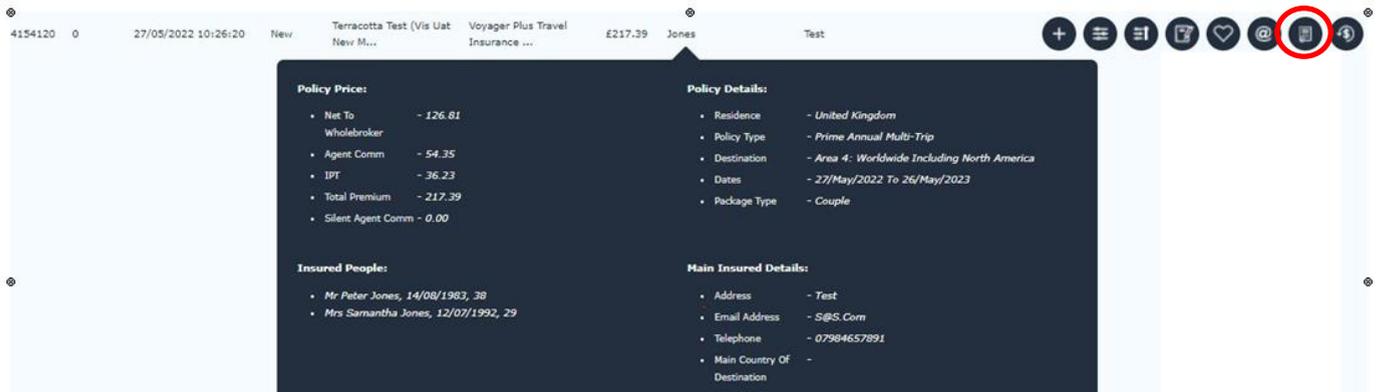
View/Email/Print documents.

To View Documents, you must click the button circled below.

To switch which document you are viewing (Wording, Certificate etc.) use the drop down menu "Select Report to View".

The document selected can be emailed, text messaged (sms) or printed using the buttons at the bottom of the screen.

- ➔ You can overtype in the email box to send to an address other than what is listed.
- ➔ You can also overtype the phone number box for text (sms)
- ➔ There will be a success message in red text below



15

You can update/change anything on a policy if it doesn't change the price.

- Click the edit option at the bottom of the page.
- Click "Save" button to save. You will need to make sure you are putting a note on the policy stating the changes you have made for it to update.

When you go back to the certificate window/page the changes should now show.

- You can NOT change start/end date
- You CAN update address, medical reference, email, phone
- You can ONLY change the Date of Birth if it doesn't change price.

The screenshot shows a policy details modal window with the following content:

- Policy Price:**
 - Net To - 126.81
 - Wholesaler -
 - Agent Comm - 84.85
 - BP - 36.23
 - Total Premium - 217.39
 - Silent Agent Comm - 0.00
- Policy Details:**
 - Residence - United Kingdom
 - Policy Type - Prime Annual Multi-Trip
 - Destination - Area 4: Worldwide Including North America
 - Dates - 27/May/2022 To 26/May/2023
 - Package Type - Couple
- Insured People:**
 - Mr Peter Jones, 14/06/1982, 38
 - Mrs Samantha Jones, 12/07/1992, 29
- Main Insured Details:**
 - Address - Test
 - Email Address - S@S.Com
 - Telephone - 07984657891
 - Main Country Of -
 - Destination -
 - Fiscal Code -
 - "Italian Residents Only" -
 - NIF "Portuguese Residents Only" -
- History:**
 - [27/May/2022] - New, 217.39 (Manual Payment)
 - Done By - TerraCotta Test (VIS UAT NEW MENU)
 - Done By User - Eleanor Brandon Test
 - On Behalf Of - TerraCotta Test (VIS UAT NEW MENU)

At the bottom right of the modal, there are two buttons: "CLOSE" and "EDIT". A red arrow points to the "EDIT" button.

16

Cancel Option – If the policy was purchased within 14 days, you can cancel and provide a full refund.

- You are advised to confirm any cancellation requests – check report list for confirmation – or you can call Voyager instead if you don't want to use this feature.
- If outside the 14 day 'cooling off' period you will not be able to use this feature and will need to call or email Voyager.



REFUND POLICY ⓧ

To request a cancellation of this policy simply click in the empty box next to Effective Date to bring up a calendar from which to choose the date. Then enter a reason for the cancellation in the box next to Reason and finally, click on Request Cancellation

Effective Date	<input type="text"/>
Amount	£ 217.39
Reason	<input type="text"/>

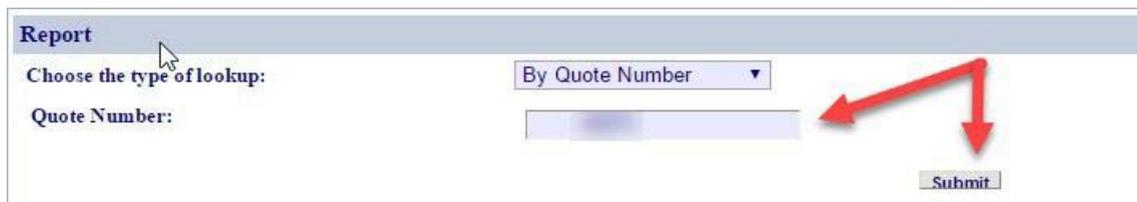
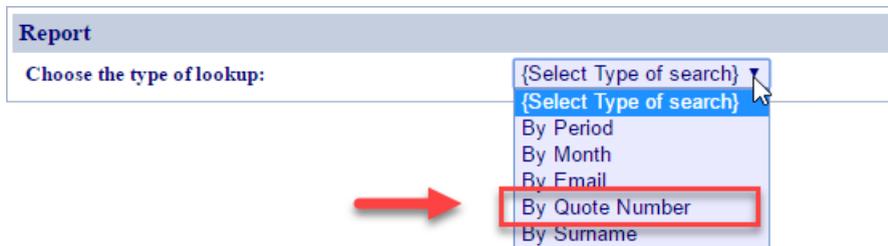
Cancel Policy ⓧ

How to Load a Saved Quote on Voyager WEBroker Dashboard

17 To load a previously saved quote – go to “Reports” at the top of your dashboard and then “Quotes”.

➔ In the type of search dropdown options select “By Quote Number”.

➔ Type in your quote reference number then click “Submit” button.



18 You will have the option to email, print or load the quote.

[Download Data](#)

Voyager Insurance Services Ltd. (99)																	
Quote Number	Version	Quote Date	Done By (user)	Status	Taken Up Policy ID	Product	Policy Type	Main Insured Surname	Email Address	Start Date	End Date	Postcode	Price	Blacklisted	Authorised	Includes Screening	Actions
76904	4	17/06/2022 10:25:15	Eleanor Brandon	Valid	0	Voyager Plus Travel Insurance Short Stay 2021 / 2022 QB4 - V4	Standard	Test	lebrandon@voyagerins.com	18-06-2022	24-06-2022	0	28.44	No	Yes	No	lebrandon@voyagerins.com   
Totals:													28.44				

19 When you load the quote – it will look like you are back at the beginning of the quote system – keep pressing “Next” to get back to the point you left off (or were timed out).

Select any required Optional Cover 1 2 3 4 5

Options for Policy (Please Select No or Yes for Each Option):

Add Activities No

Add Activities - Action No ?

Add Activities - Action Plus No ?

Wintersports - (Max 31 Days) No ?

Add Options Per Policy - Additional Cover Applies to All Persons Named on the Policy No

Section 20. Gadget Insurance No ?

Section 23. Sports Equipment and Cycle Insurance No ?

Section 26. HolidayFromHellInsurance(TM) - Holiday Contractual Dispute Insurance No ?

Section 27. Enhanced Travel or Terrorism Disruption No ?

Manage Your Excess No

Excess Waiver - Individual No ?

Double Your Excess No ?

Already Departed Travel Cover No ?

One Way Extended Trip Cover - (Extends Coverage in Final Destination from 48 hours to 31 Days) No ?

Options for Person (Please Select No or Yes for Each Option):

Apply to All ▼

Add Per Person Options - Additional Cover Applies Only to the Individual Who Has Taken the Option No

Section 21. Cruise Plus Insurance No ?

Section 22. Business Plus Insurance No ?

Section 24. Golf Insurance No ?

Next  

20

To see your summary report, go to the “Reports” tab at the top of Your dashboard, and select “Summary”.

- Choose period or month then click “submit”
- Click the “+” on the left to show more detail
- This is an easy way to view policy count, commissions and transactions (could be changes/upgrades/etc.)
- Red shows refunds
- “Not taken up” – means something went wrong (usually a system time out) and it is not a live policy as it was never issued and payment was not taken.



Find Policies

Find a Policy V3
Summary
Retail Quote Report
Commercial Quote Report

Invoicing/ Credit Control

Invoices

Renewals

Annual Renewals
Renewals Summary

Report Summary

Choose the currency: Pound ▾

Choose the type of lookup: By Month By Period

Company	Period	Trans Type	Number Policies	Number Transactions	Premium to WB	Agent Commission	IPT	Gross Price
+ terraCotta Test (VIS UAT NEW MENU)	May 2022		2	2	152.17	65.22	43.48	260.87
TOTALS			2	2	152.17	65.22	43.48	260.87

Company	Period	Trans Type	Number Policies	Number Transactions	Premium to WB	Agent Commission	IPT	Gross Price
- terraCotta Test (VIS UAT NEW MENU)	May 2022		2	2	152.17	65.22	43.48	260.87
L terraCotta Test (VIS UAT NEW MENU)	May 2022	Manual Payment	2	2	152.17	65.22	43.48	260.87
TOTALS			2	2	152.17	65.22	43.48	260.87

How to Look Up Invoices on Voyager WEBroker Dashboard

21 You have two options for looking up an invoice.

- Option 1 – ‘Reports’ tab at the top of your dashboard.
- Option 2 – ‘Invoice’ Dropdown option at the bottom of your dashboard.

HOME ▾ QUOTE AND BUY ▾ REPORTS ▾ ADMINISTRATION ▾ HELP ▾ ACCOUNT ▾

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or email enquiries@voyagerins.com

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Click on the product tiles below for the product you wish to generate a quote for!

Policies Available For Key: UK Residents EU Residents Worldwide Residents



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TRAVEL INSURANCE



ABLE2TRAVEL



INSURATRIIP



HIGH RISK VOYAGER



VOYAGERPROTECT



EUROPEAN BREAKDOWN



WEDDING INSURANCE



FRESH START
HOME INSURANCE



INSURAHOME

The following products are TEMPORARILY UNAVAILABLE, however if you are interested in selling any of these products register your interest by clicking on the product button and completing the short form...



CAR RENTAL INSURANCE

Alternative Cover to Rental
Company SCDW



GLOBALVOYAGER

Virtually Anywhere to Anywhere
Travel Insurance



TOP UP MY COVER

Increase Travel Insurance
Cancellation Cover Add-on

Invoices: June 2022 ▾ Submit

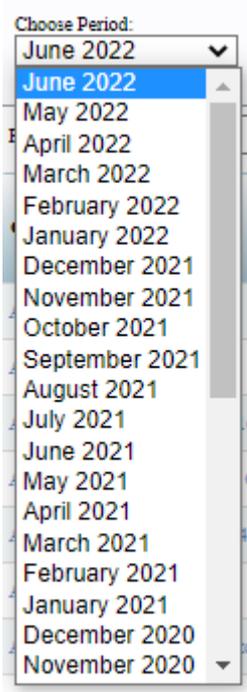
22 Option 1: At the top of your dashboard go to "Reports" - then select "Invoices"

HOME	QUOTE AND BUY	REPORTS	ADMINISTRATION	HELP	ACCOUNT
Find Policies Find a Policy V2 Find a Policy V3 Summary Retail Quote Report Commercial Quote Report	Invoicing/ Credit Control Invoices UW Totals	Renewals Annual Renewals Renewals Summary	System Reports Credit Card Only Exports Agents Per Product Agent Contacts User Details Report	Analytics Analytics	Policy/Screening Admin Change Policy Product Transfer Policies

23 This is where you can see historic invoices

Invoice Date	Owed to WB	Balance brought forward	Total Owed	Total Paid For this Invoice	Total Paid in this period	Total Unallocated in this period	Total Outstanding	# Policies Paid	Payments
2022-06-01	£4162.29	£0.00	£4162.29	£4162.29	£4162.29	£0.00	£0.00	27/27	
2022-06-01	£37.66	£0.00	£37.66	£37.66	£37.66	£0.00	£0.00	2/2	
2022-06-01	£381.41	£0.00	£381.41	£381.41	£381.41	£0.00	£0.00	3/3	
2022-06-01	£0.00	£78.26	£78.26	£0.00	£78.26	£0.00	£0.00	0/0	
2022-06-01	£250.23	£0.00	£250.23	£250.23	£250.23	£0.00	£0.00	3/3	
2022-06-01	£122.27	£0.00	£122.27	£0.00	£0.00	£0.00	£122.27	0/3	
2022-06-01	£518.94	£139.76	£658.70	£0.00	£139.76	£0.00	£518.94	0/5	
2022-06-01	£178.49	£8.46	£186.95	£0.00	£0.00	£0.00	£186.95	0/3	
2022-06-01	£29.86	£0.00	£29.86	£29.86	£29.86	£0.00	£0.00	1/1	
2022-06-01	£187.43	£0.00	£187.43	£187.43	£187.43	£0.00	£0.00	1/1	
2022-06-01	£174.69	£0.00	£174.69	£174.69	£174.69	£0.00	£0.00	1/1	
2022-06-01	£60.26	£0.00	£60.26	£60.26	£60.26	£0.00	£0.00	1/1	
2022-06-01	£58.09	£0.00	£58.09	£0.00	£0.00	£0.00	£58.09	0/1	
2022-06-01	£498.37	£0.00	£498.37	£498.37	£498.37	£0.00	£0.00	3/3	
2022-06-01	£0.00	£288.82	£288.82	£0.00	£0.00	£0.00	£288.82	0/0	
2022-06-01	£91.47	£0.00	£91.47	£0.00	£0.00	£0.00	£91.47	0/2	
2022-06-01	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	2/2	
2022-06-01	£312.79	£683.59	£996.38	£0.00	£0.00	£0.00	£996.38	0/3	
2022-06-01	£269.25	£0.00	£269.25	£269.25	£269.25	£0.00	£0.00	1/1	
2022-06-01	£16.68	£0.00	£16.68	£0.00	£0.00	£0.00	£16.68	0/1	
2022-06-01	£322.87	£0.00	£322.87	£0.00	£0.00	£0.00	£322.87	0/1	

24 Click date (hyperlink) to view invoice.



25 To print an invoice, select the tick box and then click “Print Selected” button. A new window/tab will open showing the selected invoices - press “CTRL+P” to bring up your printer options.

→ You can select multiple invoices at once

Actions:

Filter Invoices By: Show "Agent Owes" Show "WB Owes" Show "Unsettled only" Show full invoice detail

Invoice	Date	Owed to WB	Balance brought forward	Total Owed	Total Paid For this Invoice	Total Paid in this period	Total Unallocated in this period	Total Outstanding	# Policies Paid	Payments	<input type="checkbox"/>
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26 Option 2: At the bottom of your dashboard select the month you want to view and then press “submit button”. A new window/tab will open showing the selected invoices - press “CTRL+P” to bring up your printer options.

➔ This option only shows the past 12 months.

HOME ▾ QUOTE AND BUY ▾ REPORTS ▾ ADMINISTRATION ▾ HELP ▾ ACCOUNT ▾

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Invoices: