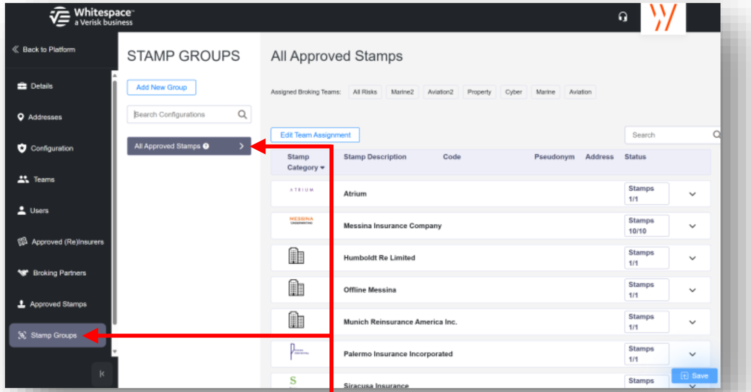
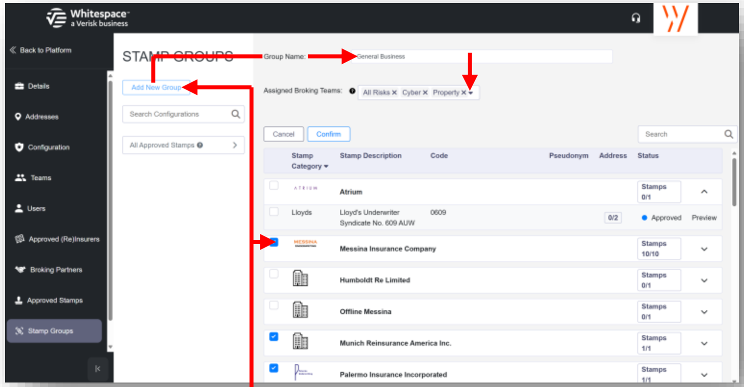
Using Stamp Groups to Assign Approved Stamps to User Teams

1.



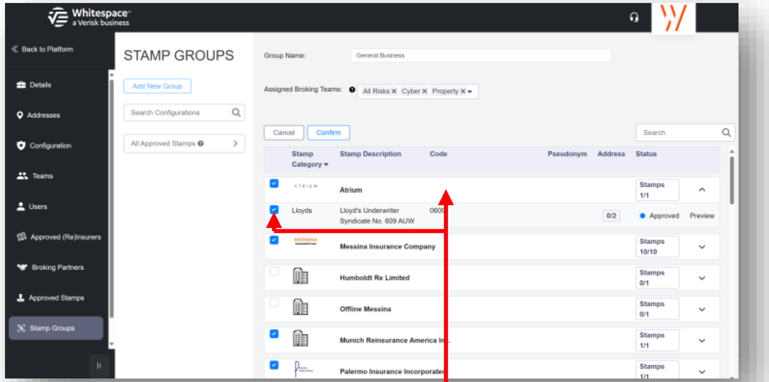
Brokers can only suggest approved stamps from groups assigned to their teams. Approved underwriters can only apply suggested stamps. So, to preserve functionality, all broking teams are assigned the 'All Approved Stamps' group by default.

2.



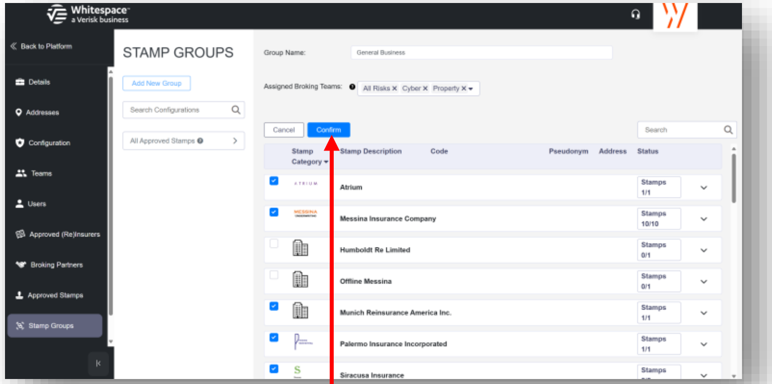
To create a new stamp group, click the 'Add New Group' button, name the group, and select teams from the 'Assign Broking Teams' dropdown. You can toggle inclusion of all or none of a (re)insurer's approved stamps by ticking the box by their logo.

3.



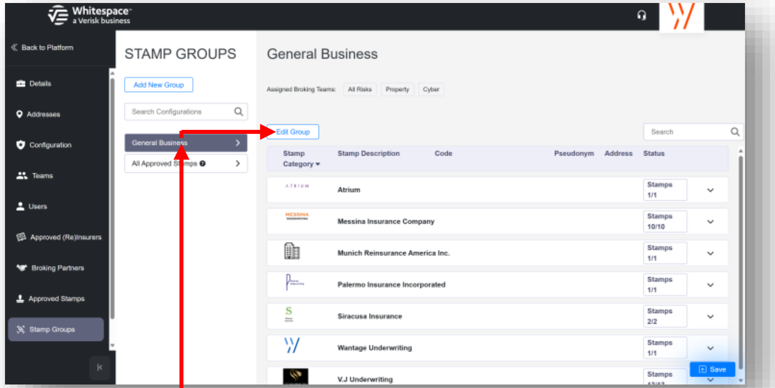
Clicking on a (re)insurer's name expands their entry to show their approved stamps. Individual stamps can be selected or deselected for inclusion in the stamp group by ticking the box at the left of their entry.

4.



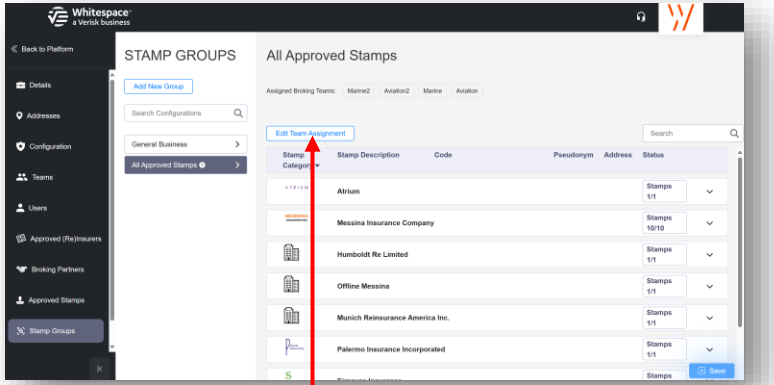
When the stamp group is complete, click 'Confirm'. Remember that all updates made in the Admin Portal are considered provisional until you have clicked the 'Save' button and then confirmed the changes.

5.



Groups are listed to the left of the Stamp Groups window. Click on a group name to view it in the main portion of the window. Stamp groups can be edited freely, and revisions apply to all contracts in teams using that group, including existing ones.

6.



The 'All Approved Stamps' group is auto-generated and is not editable. It is automatically assigned to teams that do not have any other stamp groups. Click 'Edit Team Assignment' to add teams to this group, removing them from all other groups.

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