



# VALIDATION PORTAL USER GUIDE

IAG NZ



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## 1 Introduction

Welcome to the Instant Windscreens Validation portal. This portal has been created to enable staff at IAG NZ the ability to quickly and effectively manage requests to have customer policy information validated and approved.

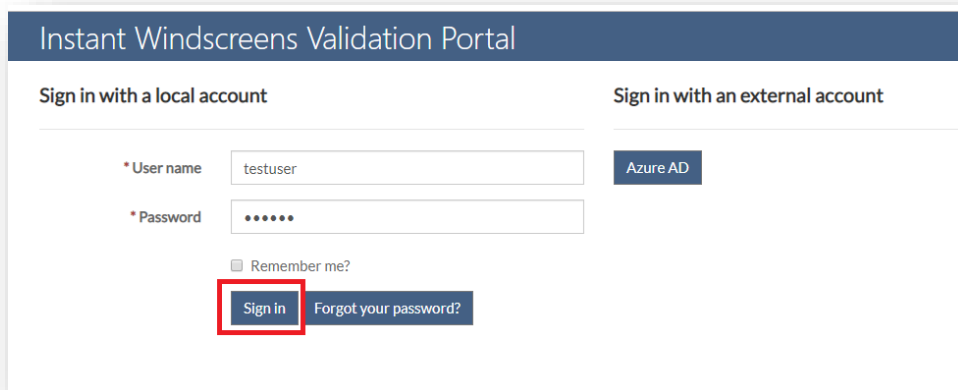
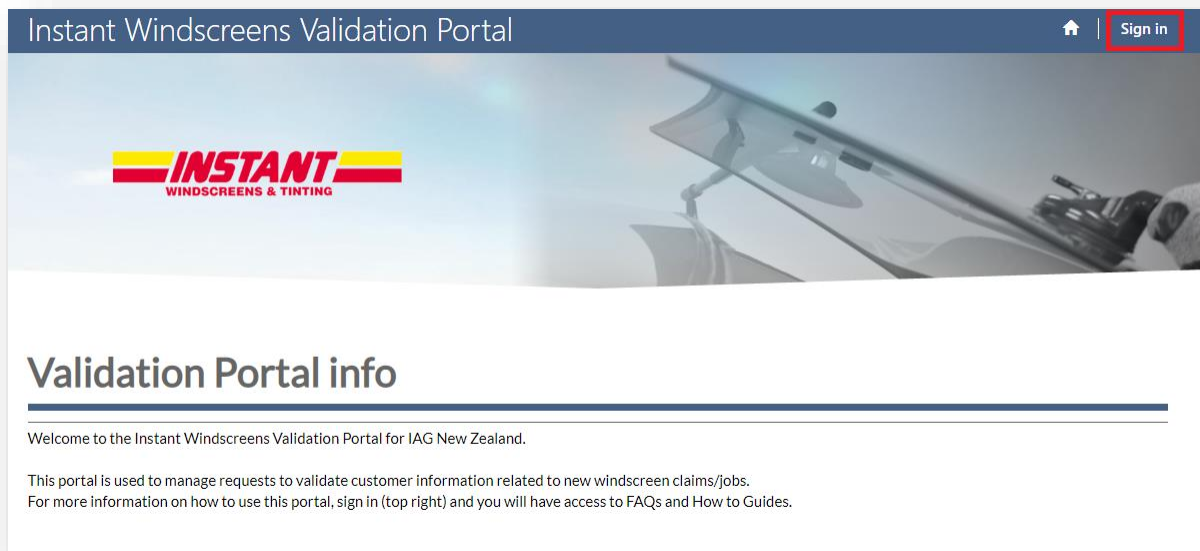
The easy to understand interface is made with you in mind, so if you have suggestions to improve, you can send you feedback through to [jolene@instantwindscreens.com](mailto:jolene@instantwindscreens.com).

## 2 Logging In

To access the validation portal go to:

<https://validations.instantwindscreens.com>

Login using the username and password previously provided to you.



If you ever forget your password, click the 'Forgot your password?' button on the login screen. Instructions on how to reset your password will be emailed to you directly.

### 3 Managing your details

Once you've logged into the portal, you will be presented with your profile information page.

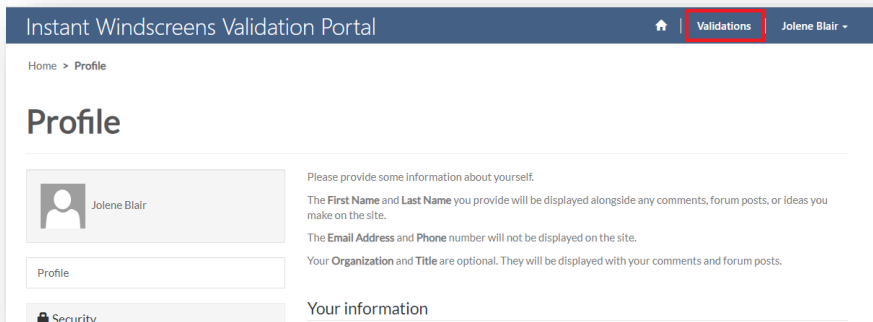
This page allows you to update a number of details including:

- Your Name
- Your Password
- Your Email address
- Other contact information

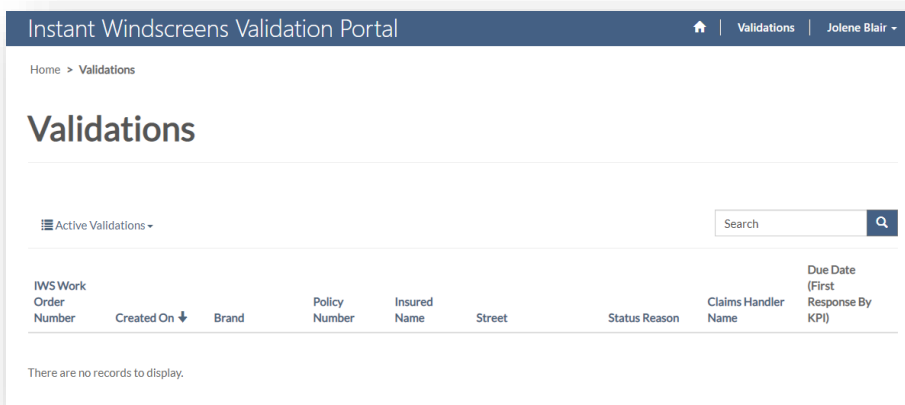
If you need to update your access (ie; which brands you are able to process validation requests for), send your request through your manager to Eva Ramos ([Eva.Ramos@iag.co.nz](mailto:Eva.Ramos@iag.co.nz)) who will request from Instant Windscreens directly.

### 4 Validating Policy Information Requests

To access the list of validation requests, click on the 'Validations' button in the top right of the page.

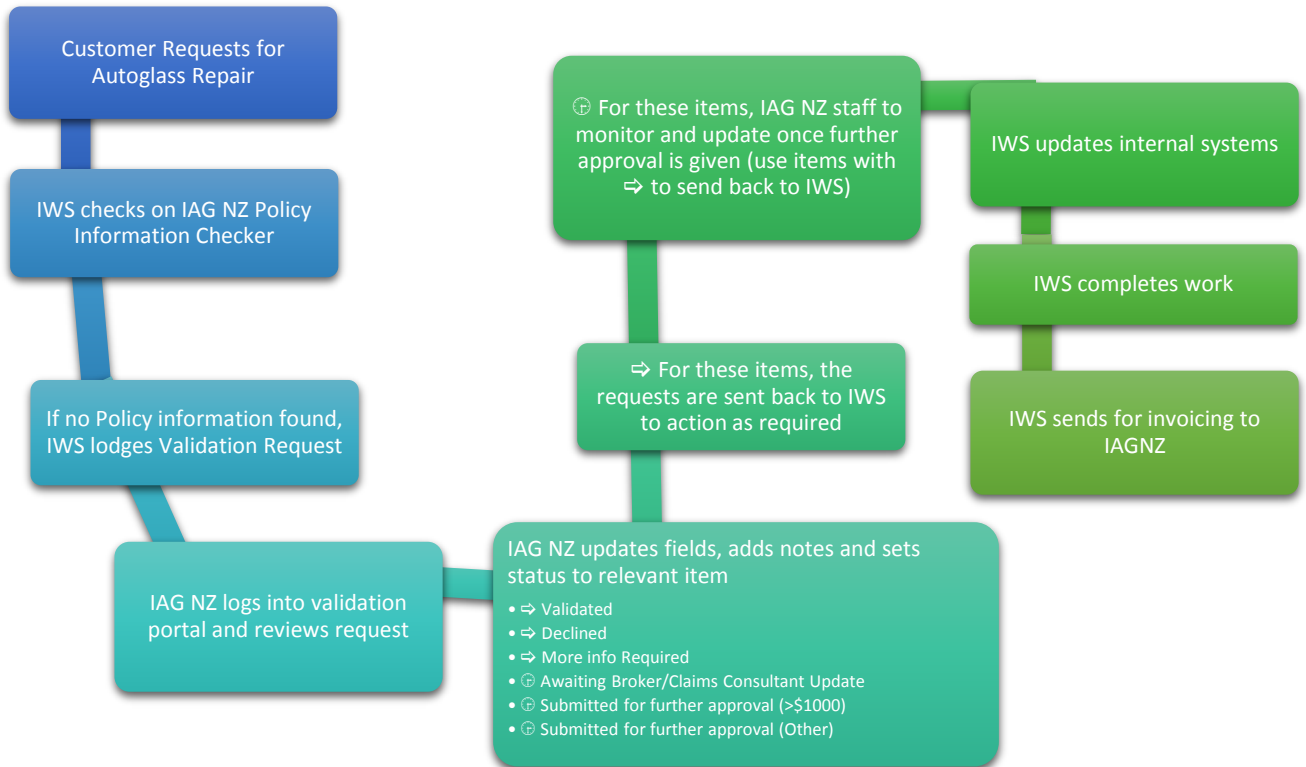


By default the view you will see is for 'Active Validations'.



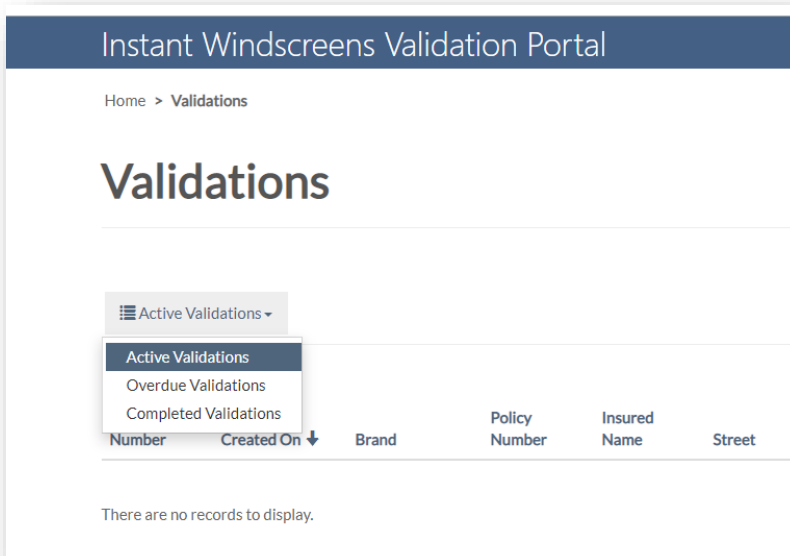
### 4.1 Instant Windscreens Validation Request Process

The current process for validating a windscreen jobs with Instant Windscreens as per below:



### 4.2 Viewing Requests via the portal

Now that you’ve logged into the portal, there are 3 main preset views you can use to view validations. To change, click the drop down next to the view name as per below.



#### 4.2.1 Active Validations View

This view shows all validations which have what is considered and Active Validation status. These are;

- Validation Required
- Awaiting Broker/Claims Consultant Update
- Submitted for further approval (>\$1000)
- Submitted for further approval (Other)

#### 4.2.2 Overdue Validations

This view shows all validations which are active (as per previous point), but have missed the target response time of 9 business hours. These are considered very urgent as this may be holding up the work from being completed.

#### 4.2.3 Completed Validations

This view shows all validations which are considered completed (no further action required by IAG NZ).

### 4.3 Searching for and sorting requests

You can sort the list of requests in any of the views simply by clicking on the column title. Clicking again will switch the order in which they are being sorted.

The easiest way to search for a request is to use the search field on the right of the validations views. You'll notice that if you hover of the field it gives you a tooltip as per below:

*"To search on partial text, use the asterisk (\*) wildcard character".*

For example, if I was to search for the IWS Work Order Number with only the numbers for the below AMI request, I would need to put in the search field **\*035462** .



**The search field only works in the current view selected. If you want to search for a previously completed request, make sure you change the view to 'Completed Validations'.**

The screenshot shows the 'Validations' page with a search bar at the top right containing the text '\*035462'. A tooltip above the search bar reads: 'To search on partial text, use the asterisk (\*) wildcard character.' Below the search bar is a table with the following data:

IWS Work Order Number	Created On ↓	Brand	Policy Number	Insured Name	Street	Status Reason	Claims Handler Name	Due Date (First Response By KPI)
EXPO035462	8/12/2019 11:21 AM	AMI COMMERCIAL IVR	testamipolicy	TEST AMI CUSTOMER	1 TEST ST	Validation Required		8/13/2019 10:21 AM

#### 4.4 Updating Requests

To access a request you can click on the IWS Work Order Number or the drop down option and view details on the validation request you would like to access.



**The requests visible to you are based on all items in the brand (i.e. if you are able to process AMI personal requests, you will see all AMI requests). Only click on the items that relate to you by looking at the 'Brand' column (the below example shows a State Commercial Request).**

IWS Work Order Number	Created On ↓	Brand	Policy Number	Insured Name	Street	Status Reason	Claims Handler Name	Due Date (First Response By KPI)
<b>EXPO0134567</b>	8/12/2019 10:51 AM	STATE COMMERCIAL IVR	teststate123	STATE TEST CUSTOMER	1 TEST ST	Validation Required		8/13/2019 9:51 AM

From here you simply fill in the relevant fields for that specific request (scroll down to see all fields).



**The status field controls who can view the request and the next actions associated with the job. It's important that you update this field and click the submit button at the bottom of the screen.**

The below screen shot shows what request details view looks like. All fields which are editable will have a rectangular box under the field description.

## PORTAL\_EXPO0134567

Validation **Active - Validation Required**

### Validation

#### INFO

<b>Case Title *</b> PORTAL_EXPO0134567	<b>ID</b> CAS-00026-R7K3H1
<b>Type *</b> Validation	<b>Priority</b> Normal
<b>Date of Loss *</b> 8/12/2019	<b>IWS Work Order Number *</b> EXPO0134567
<b>Cause of Loss *</b> AI: Accidental Impact (Human, Animal, Object, etc.)	<b>Registration *</b> ABC123
<b>Insured Name *</b> STATE TEST CUSTOMER	<b>Risk Number</b> <input type="text"/>
<b>Motor Assessors Email</b> <input type="text"/>	
<b>Status</b> <input type="text"/>	

#### CUSTOMER & CONTACT

<b>Contact Name</b> -	<b>Customer *</b> STATE
<b>Preferred Contact Number *</b> 0892327037	<b>Customer Email</b> -
<b>Alternative Contact Number</b> -	<b>Brand *</b> STATE COMMERCIAL IVR



#### GLASS

Type of Glass *	Price of Glass - inc GST *
WINDSCREEN	\$546.00

#### POLICY & CLAIMS

Policy Number *	Policy Expiry Date
<input type="text" value="teststate123"/>	<input type="text"/>
Claim Number	Claims Handler Name
<input type="text"/>	Jolene Blair
Excess	
<input type="text"/>	

#### ADDRESS

Street *	Suburb
1 TEST ST	—
Branch	Postcode
CA: APPROVED SERVICE PROVIDERS NZ	—

#### VEHICLE

Vehicle Make/Body/Description	Vehicle Year
TEST VEHICLE	2019

Timeline [Add comment](#)

There are no activities to display.

### SLA Details

SLA KPI Instances

Name ↑	Status	Due Date	Warning Time	Succeeded On
First Response By KPI	In Progress	8/13/2019 9:51 AM	8/13/2019 7:51 AM	
Resolve By KPI	In Progress	8/14/2019 8:51 AM	8/14/2019 6:51 AM	

[Submit](#)

#### 4.4.1 Adding Comments/Notes

To add notes to a request, you will need to click on the 'Add comment' button near the bottom of the page. You will get a window popup to enter your comment and submit. Comments and notes associated with this request will be found in the timeline section of the detail view (it's important to check this before processing a request).

**ADDRESS**

Street *	Suburb
1 TEST ST	—
Branch	Postcode
CA: APPROVED SERVICE PROVIDERS NZ	—

**VEHICLE**

Vehicle Make/Body/Description	Vehicle Year
TEST VEHICLE	2019

Timeline Add comment

There are no activities to display.

**Add a Comment** ×

\* Comment

Attach a file  No file chosen


**ADDRESS**

Street *	Suburb
1 TEST ST	—
Branch	Postcode
CA: APPROVED SERVICE PROVIDERS NZ	—

**VEHICLE**

Vehicle Make/Body/Description	Vehicle Year
TEST VEHICLE	2019

Timeline

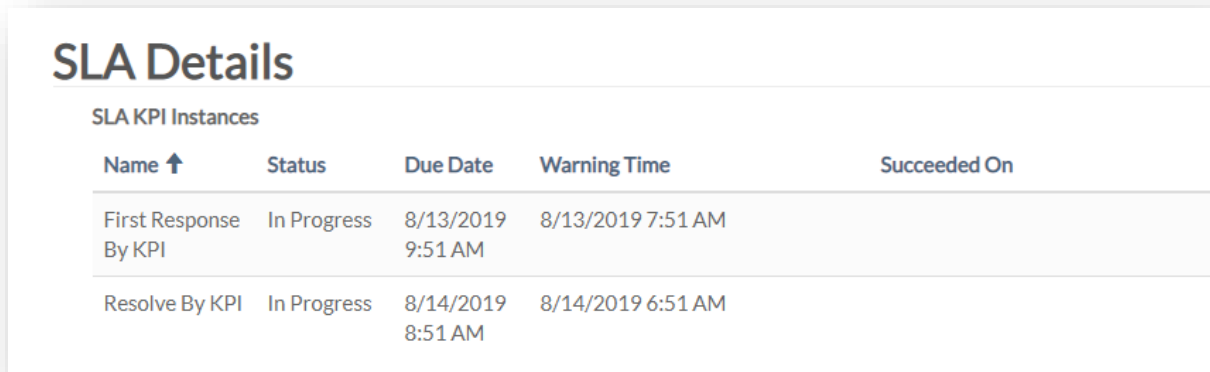
 less than a minute ago

**Jolene Blair → Jolene Blair**  
This is a test comment.  
Created by SYSTEM

#### 4.4.2 Viewing SLA progress

You'll notice at the end of the request details page there is a section called SLA details. This stands for Service Level Agreement Details.

This allows you to track how long this request has been waiting and also how long is left before it'll be escalated (due to non processing).



SLA Details				
SLA KPI Instances				
Name ↑	Status	Due Date	Warning Time	Succeeded On
First Response By KPI	In Progress	8/13/2019 9:51 AM	8/13/2019 7:51 AM	
Resolve By KPI	In Progress	8/14/2019 8:51 AM	8/14/2019 6:51 AM	

#### 4.4.3 Finalising a validation

Finalising a validation is easy, simply update the request to have a status of either 'Validated' or 'Declined'. Then click the Submit button at the bottom of the page.

## 5 Further Information

More information on the portal or if there are training requests, or issues can be sent through to [nzsales@instantwindscreens.com](mailto:nzsales@instantwindscreens.com). You can also contact Instant Windscreens 24/7 on 0800 288 645.