

Guideline to copoloffcentrale

Pop up Blocker must be disabled for use – (you must use Internet Explorer)

- Go to Tools → Select “Pop up blocker” → Turn “OFF Pop up blocker”

STEP 1: GETTING STARTED

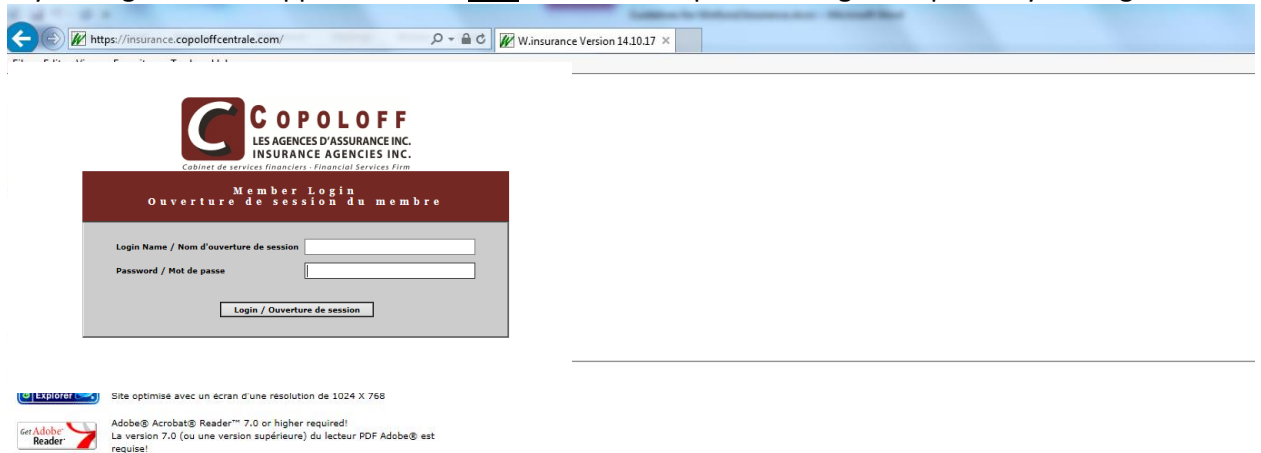
- Go to www.copoloffcentrale.com
- Select insurance

copoloffcentrale



Step 2: LOGGING IN

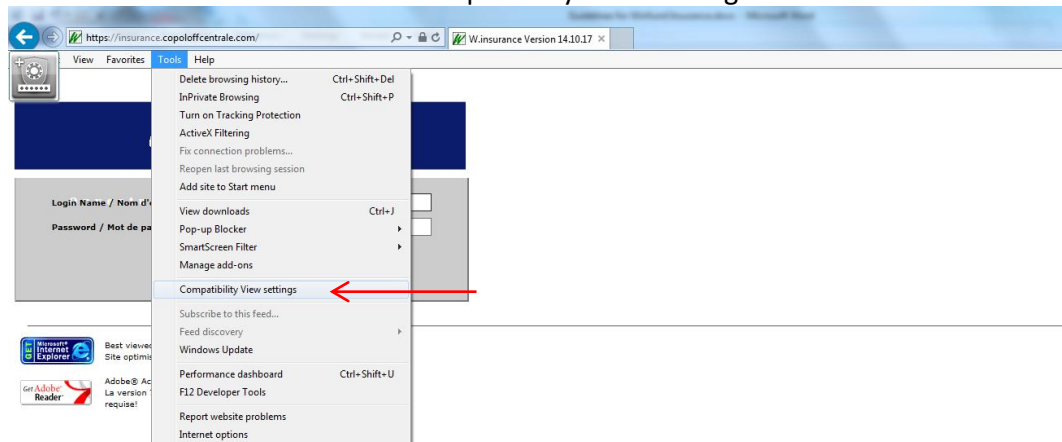
- If your log in screen appears on the left follow the steps to “change compatibility settings”



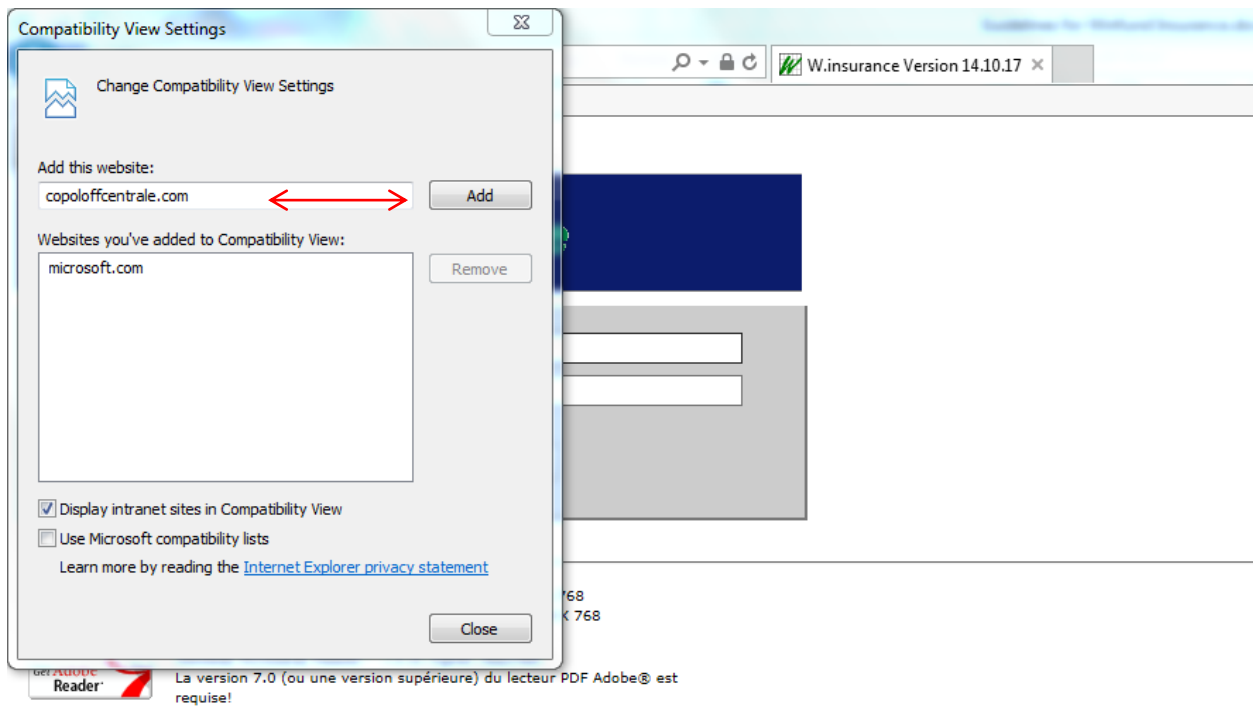
- If your log in screen is centered go directly to **Step 3**

Change compatibility settings

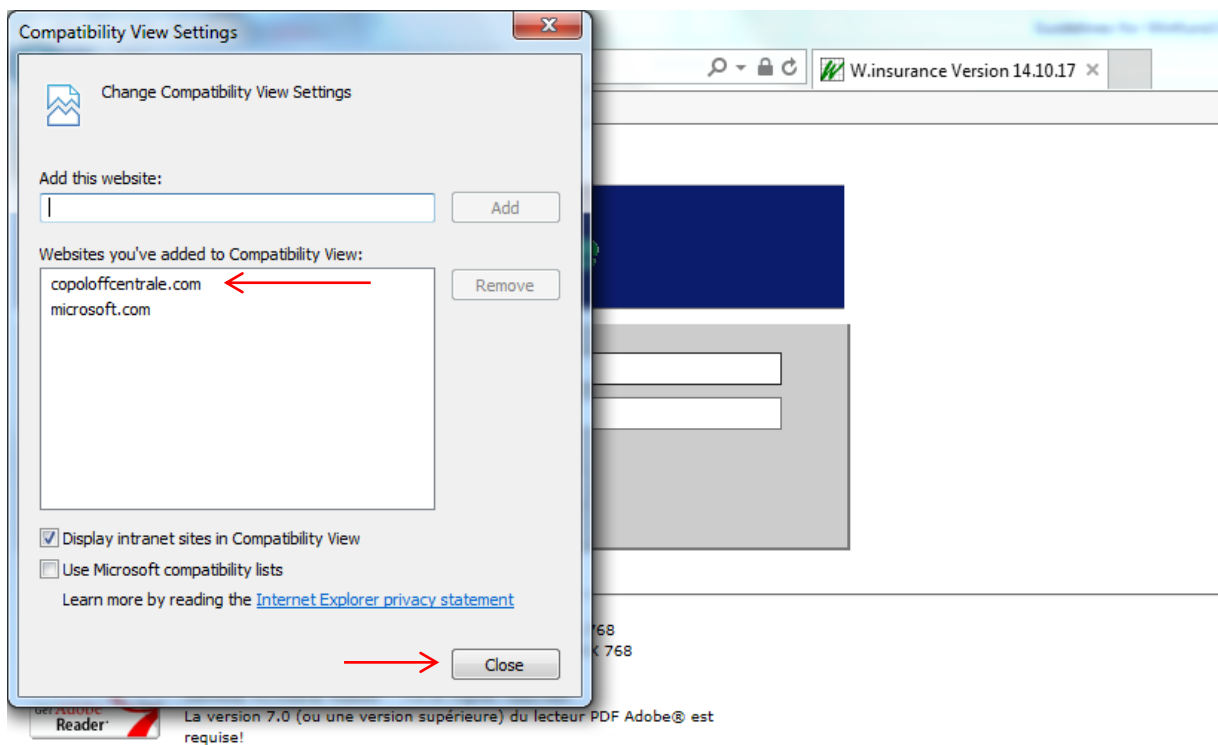
- From the Tools menu bar select Compatibility View Setting



- Copoloffcentrale.com will appear in the field “Add this website” click on the Add button



- The web address will then move into the “Websites you’ve added section”



- Click the Close button

Step 3

- Enter your USER ID and password



The image shows the Copoloff Member Login page. At the top is the Copoloff logo with the text "LES AGENCES D'ASSURANCE INC. / INSURANCE AGENCIES INC. / Cabinet de services financiers - Financial Services Firm". Below the logo is a dark red header with "Member Login" and "Ouverture de session du membre". The main form area has two input fields: "Login Name / Nom d'ouverture de session" and "Password / Mot de passe". A "Login / Ouverture de session" button is at the bottom.

Step4: VIEW YOUR CASES

- Once logged in the default page will be all of your outstanding cases. To view the next page you will need to click on the number 2, 3 etc. (numbers appear in yellow)

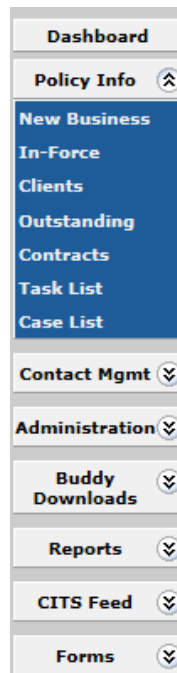


The image shows a table titled "OUTSTANDING REQUIREMENTS". At the top left is a checkbox labeled "Incl. NPW & Declined". At the top right is the text "Mouse over icon to see the DL Legend: ?" with a red arrow pointing to a question mark icon. Below this is a table with columns: Policy, PolicyID, Policy #, Name, Date Entered, DL, Requirement, and Description. The "DL" column contains the number "1" in yellow. The "Requirement" and "Description" columns are empty.

STEP 4: POLICY INFO TAB

Areas currently available on the system are under the Policy Info tab which include;

- New Business • In-Force • Outstanding • Contracts



The image shows a vertical menu with the following items: Dashboard, Policy Info (with an expand/collapse icon), New Business, In-Force, Clients, Outstanding, Contracts, Task List, Case List, Contact Mgmt (with a dropdown arrow), Administration (with a dropdown arrow), Buddy Downloads (with a dropdown arrow), Reports (with a dropdown arrow), CITS Feed (with a dropdown arrow), and Forms (with a dropdown arrow). A red bracket is drawn to the right of the menu items from "New Business" to "Case List".

More tabs will be available for use soon – stay tuned for details.

If you click on any of the tabs and receive a message telling you 'access denied and contact your system administrator' please ignore this message.

Access to this page is denied.

*Contact your system administrator
for more detail.*

To continue, click a link on the left or top menus.

We would also appreciate receiving your feedback regarding your experience using the system and any suggestions that you may have for improvement info@copoloff.com

