



# Customer Web Portal (CWP)

## AGENT COMPANY USER GUIDE



# 1. INTRODUCTION

The Customer Web Portal (CWP) is Sasria's digital platform for issuing and managing coupons and group scheme policies.

The portal is integrated with the Sasria Rates Calculator and uses a single sign on (SSO) process, allowing authorised users to access both platforms with one set of credentials.

This guide provides step by step instructions to help Agent Company users navigate and use the portal effectively. Users can quickly issue new coupons and view existing policies, streamlining their workflow and improving efficiency significantly.

## 2. ACCESSING THE CUSTOMER WEB PORTAL

### SYSTEM REQUIREMENTS

For the best user experience, use the latest version of one of the following browsers:

- **Google Chrome**
- **Microsoft Edge**
- **Safari**
- **Internet Explorer**

### ACCESSING THE PORTAL

- **Log in to the Sasria Rates Calculator using your credentials.**
- **If your profile has been granted CWP access, a Customer Web Portal (CWP) option will automatically be displayed.**
- **Select CWP to launch the portal.**
- **No separate login is required.**



# 3. USER REGISTRATION

## FIRST-TIME REGISTRATION

All users are required to register before accessing the Customer Web Portal.

### STEPS

- Log in to the Sasria Rates Calculator.
- Select the Register for CWP option.
- Complete the registration form.
- Submit your registration request.

## REGISTRATION OUTCOMES

### IF APPROVED

- An approval email will be sent.
- Select the secure link provided in the email.
- Create and confirm your password.
- Log in to the Customer Web Portal.

### IF APPROVED

- You will receive an email notification explaining the reason for the decline.
- Correct any identified issues and resubmit your application if required.

# 4. LOGGING IN

## LOGIN STEPS

- Navigate to the login page.
- Enter your username and password.
- Select **Log In**.

The screenshot shows the login page with the following elements highlighted by red circles:

- The **Login** button.
- The **Email address** input field containing "you@company.co.za".
- The **Your password** input field.
- The **Forgot your password?** link.

## FORGOT PASSWORD

If you have forgotten your password:

- Select **Forgot Password**.
- Follow the password reset instructions.
- Create a new password.
- Log in using your updated credentials

# 5. DASHBOARD OVERVIEW

The dashboard serves as the main landing page after login.

The screenshot shows the CWP dashboard with the following sections:

- Welcome to the Sasria Customer Web Portal (CWP)**
- IT Service Desk**: 011 214 0800, ITServiceDesk@sasria.co.za
- Disclaimer**: 1 Access to and use of this information is subject to the following terms and conditions: By entering the portal you confirm you have read and accept the terms above.
- Buttons**: Decline, Accept & Enter Portal

The screenshot shows the CWP dashboard with the following sections:

- PORTAL**: Portal Home
- SERVICES**: Group Scheme Registration, Coupon Administration, General Endorsements, Backdating Requests, My Approvals
- Rate Calculator**
- User Profile**: Daniel Moahi, tmholdingspty@gmail.com
- Sign out**
- ACTIVE COUPONS**: 39
- THIS MONTH**: 47 coupons issued
- GROUP SCHEMES**: 7 0 pending - 20 members
- PENDING APPROVALS**: 1
- UNREAD NOTIFICATIONS**: 56
- Needs your attention**: 4 referred quotes waiting, Provisional renewal — GP/2026/00001, Provisional renewal — FE/2026/00006
- Recent activity**: Endorsement GE/0000034/2026, Coupon issued — FE/2026/00056, Endorsement GE/0000033/2026, Endorsement GE/0000032/2026

# DASHBOARD FEATURES

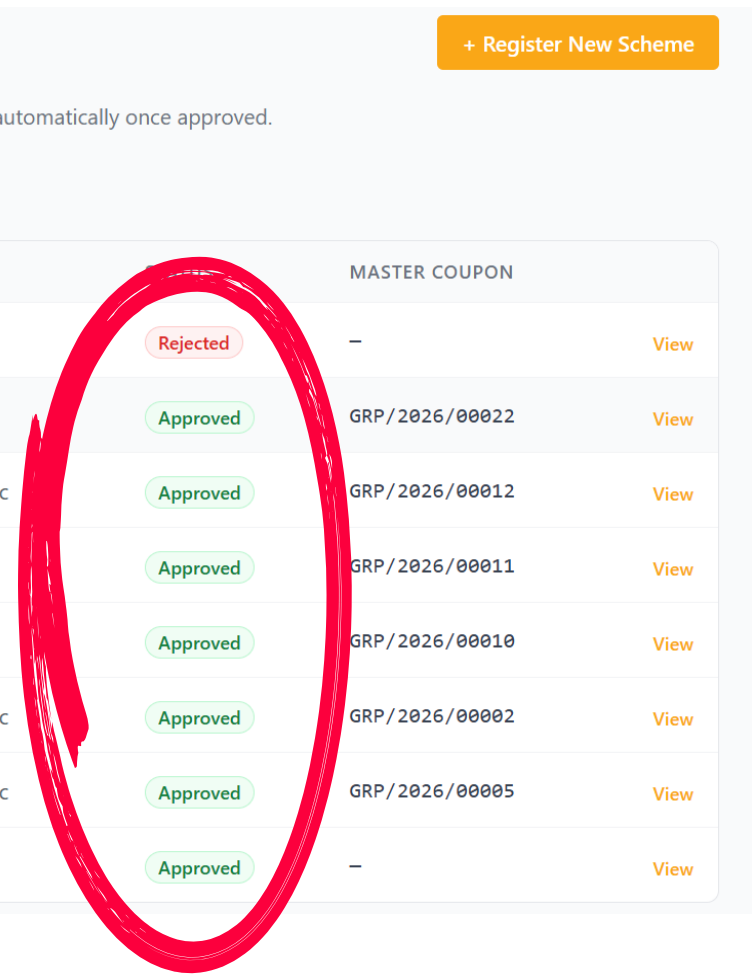
## POLICY CYCLE STATUS

Before processing transactions, always verify the current policy cycle status displayed on the dashboard.

## NOTIFICATIONS

The notification panel provides updates relating to:

- Submitted requests
- Approvals
- Rejections
- Outstanding actions
- System communications

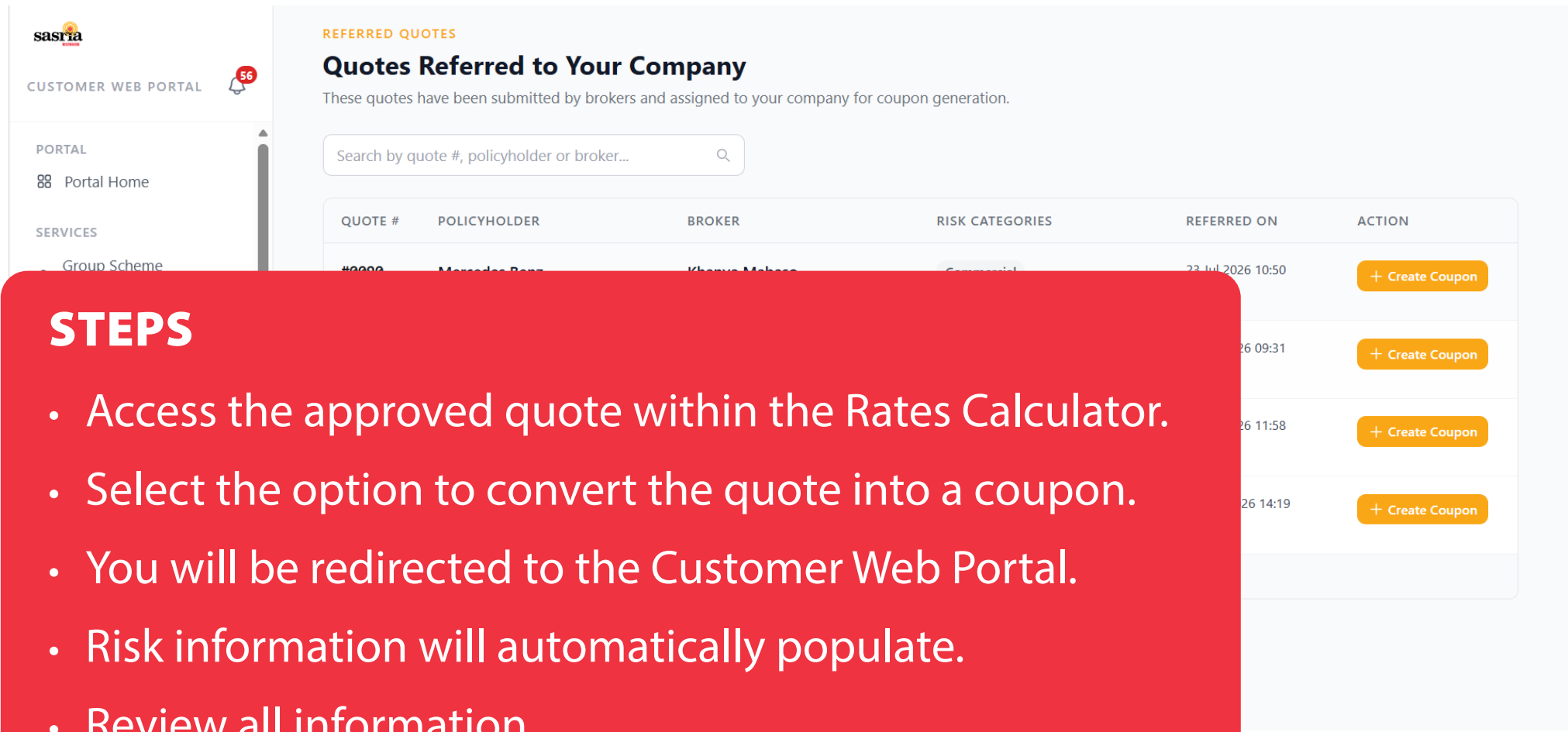


| MASTER COUPON |                |                      |
|---------------|----------------|----------------------|
| Rejected      | —              | <a href="#">View</a> |
| Approved      | GRP/2026/00022 | <a href="#">View</a> |
| Approved      | GRP/2026/00012 | <a href="#">View</a> |
| Approved      | GRP/2026/00011 | <a href="#">View</a> |
| Approved      | GRP/2026/00010 | <a href="#">View</a> |
| Approved      | GRP/2026/00002 | <a href="#">View</a> |
| Approved      | GRP/2026/00005 | <a href="#">View</a> |
| Approved      | —              | <a href="#">View</a> |

# 6. MANAGING COUPONS

## CONVERT A QUOTE TO A COUPON

Quotes referred through the Rates Calculator can be converted into coupons.



| REFERRED QUOTES                                                                                 |              |                   |                 |                   |                                 |
|-------------------------------------------------------------------------------------------------|--------------|-------------------|-----------------|-------------------|---------------------------------|
| Quotes Referred to Your Company                                                                 |              |                   |                 |                   |                                 |
| These quotes have been submitted by brokers and assigned to your company for coupon generation. |              |                   |                 |                   |                                 |
| Search by quote #, policyholder or broker...                                                    |              |                   |                 |                   |                                 |
| QUOTE #                                                                                         | POLICYHOLDER | BROKER            | RISK CATEGORIES | REFERRED ON       | ACTION                          |
| 00000                                                                                           | Manulife Reg | Manulife Malaysia | Generalist      | 23 Jul 2026 10:50 | <a href="#">+ Create Coupon</a> |
|                                                                                                 |              |                   |                 | 26 09:31          | <a href="#">+ Create Coupon</a> |
|                                                                                                 |              |                   |                 | 26 11:58          | <a href="#">+ Create Coupon</a> |
|                                                                                                 |              |                   |                 | 26 14:19          | <a href="#">+ Create Coupon</a> |

## STEPS

- Access the approved quote within the Rates Calculator.
- Select the option to convert the quote into a coupon.
- You will be redirected to the Customer Web Portal.
- Risk information will automatically populate.
- Review all information.
- Complete any mandatory outstanding fields.
- Submit the request for issuance.

## CONVERT A QUOTE TO A COUPON

The screenshot shows the 'COUPON ADMINISTRATION' section of the Sasria Customer Web Portal. The page title is 'Coupons' with the subtitle 'Manage Sasria coupon issuance for your company.' A red circle highlights the '+ New Coupon' button in the top right corner. A red overlay box in the center contains the following steps:

- Navigate to Manage Coupons.
- Select Create Coupon.
- Choose the appropriate class of business.
- Complete all required information.
- Submit the coupon.
- Download the issued coupon in PDF format.

The interface also includes a left sidebar with navigation links like 'Portal Home', 'Group Scheme Registration', 'Coupon Administration', 'General Endorsement', 'Backdating Reinstatement', 'My Approvals', and 'Rate Calculator'. The top right corner shows the user's name 'Daniel Moal' and a 'Sign out' button.

## COUPON NUMBERING



CUSTOMER WEB PORTAL

56

PORTAL

SERVICES

## Group Scheme Registration

Register schemes and submit for Sasria approval. The master coupon is issued automatically once approved.

All
Pending
Approved
Rejected
Cancelled

[+ Register New Scheme](#)

The system automatically generates a unique coupon number using the following format:

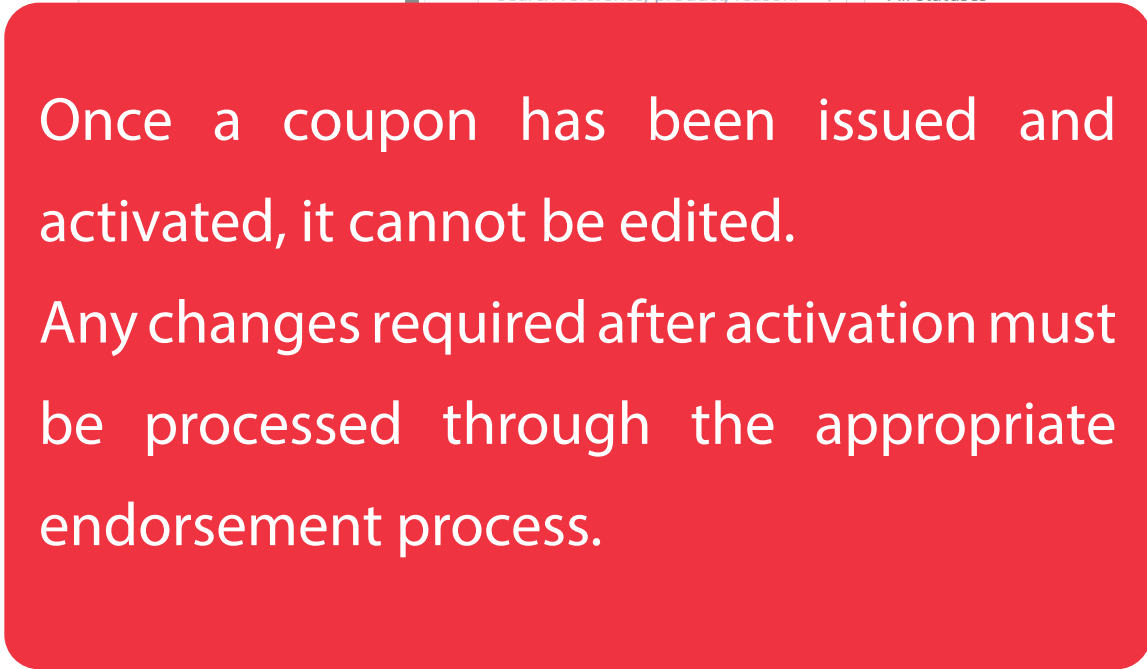
**Class Code / Year / Sequential Number**

**Example:**

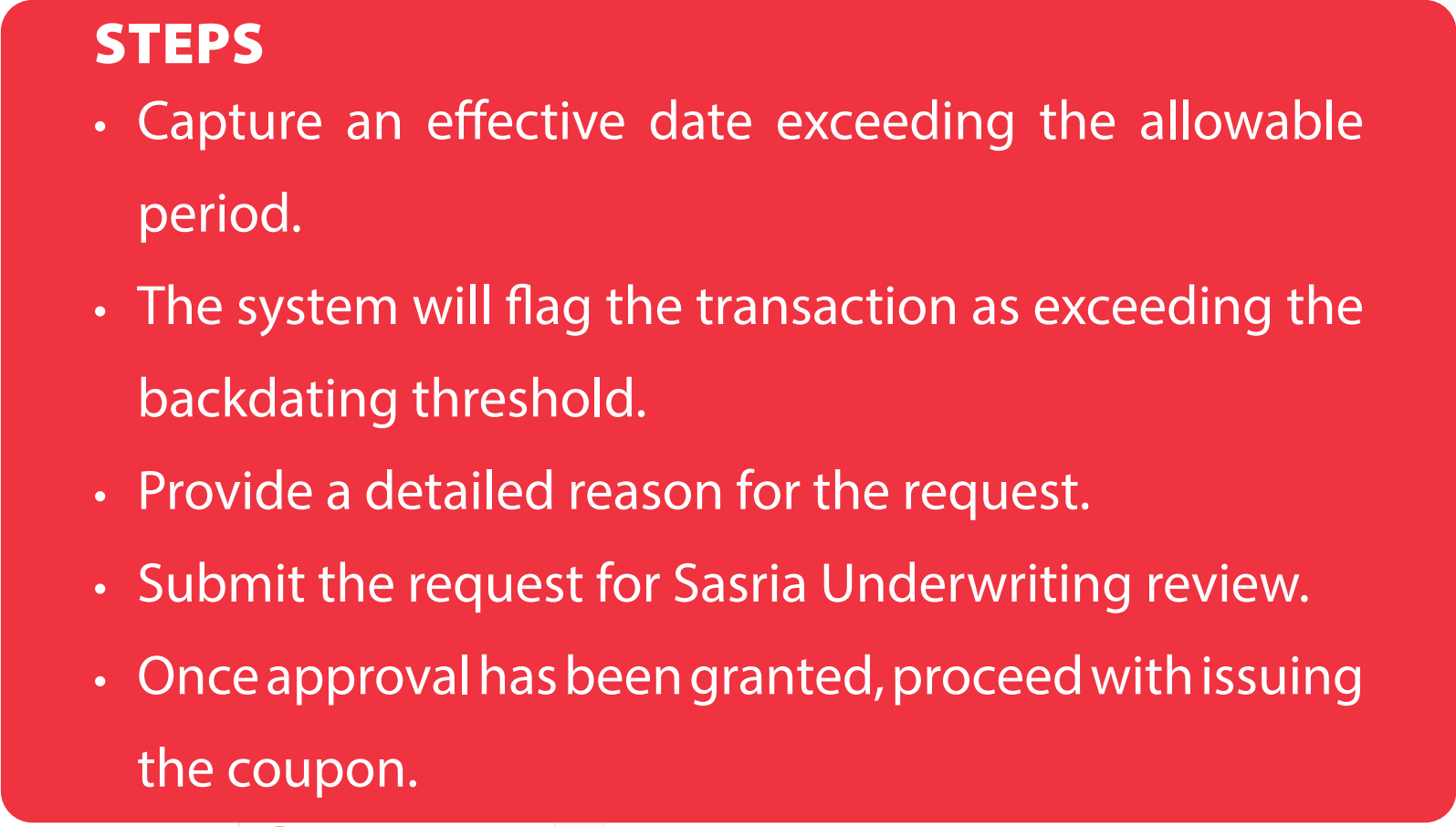
**F2/2026/00010**

| STATUS   | MASTER COUPON                       |
|----------|-------------------------------------|
| Rejected | — <a href="#">View</a>              |
| Approved | GRP/2026/00022 <a href="#">View</a> |
| Approved | GRP/2026/00012 <a href="#">View</a> |
| Approved | GRP/2026/00011 <a href="#">View</a> |
| Approved | GRP/2026/00010 <a href="#">View</a> |
| Approved | GRP/2026/00002 <a href="#">View</a> |
| Approved | GRP/2026/00005 <a href="#">View</a> |
| Approved | — <a href="#">View</a>              |

## EDITING ACTIVE COUPONS



Where the effective date exceeds the allowed period, a backdating approval request is required..



| TRANSACTION TYPE | MAXIMUM BACKDATING PERIOD |
|------------------|---------------------------|
| Standard Coupon  | 30 Days                   |
| Group Scheme     | 60 Days                   |

# 8. REFERRED QUOTES

## QUOTES REFERRED FROM THE RATES CALCULATOR

Brokers and UMAs may refer quotes to an Agent Company for processing.



CUSTOMER WEB PORTAL

PORTAL

Portal Home

SERVICES

Group Scheme Registration

Coupon Administration

General Endorsements

Backdating Requests

My Approvals

Annexures

REFERRED QUOTES

Quotes Referred to Your Company

These quotes have been submitted by brokers and assigned to your company for coupon generation.

Search by quote #, policyholder or broker...

| QUOTE # | POLICYHOLDER                         | BROKER                                  | RISK CATEGORIES | REFERRED ON       | ACTION          |
|---------|--------------------------------------|-----------------------------------------|-----------------|-------------------|-----------------|
| #0090   | Mercedes Benz<br>Created 23 Jul 2026 | Khanya Mabaso<br>khanyam@sasria.co.za   | Commercial      | 23 Jul 2026 10:50 | + Create Coupon |
| #0071   | Moreki<br>Created 15 Jul 2026        | Daniel Moahi<br>tmholdingspty@gmail.com | Commercial      | 15 Jul 2026 09:31 | + Create Coupon |
| #0069   | Nephew<br>Created 09 Jul 2026        | Daniel Moahi<br>danielm@sasria.co.za    | Commercial      | 09 Jul 2026 11:58 | + Create Coupon |
| #0059   | Transnet                             | Niabulo Ndlela                          | Commercial      | 22 Jun 2026 14:19 | + Create Coupon |

### PROCESS

- A referred quote is sent to the Agent Company.
- The quote is submitted to Sasria for approval.
- Once Sasria approval has been obtained, the Agent Company may convert the quote into a coupon.
- The coupon can then be issued through the Customer Web

# 9. MANAGING GROUP SCHEMES

## REGISTER A GROUP SCHEME



CUSTOMER WEB PORTAL

PORTAL

Portal Home

SERVICES

Group Scheme Registration

Coupon Administration

1.

- Navigate to **Manage Group Schemes**.
- Select **Register Group Scheme**.
- Complete all required information.
- Submit the application for review.

2. REVIEW PROCESS

- Sasria Underwriting will:
- Review the submission.
- Approve or reject the application.
- Provide a reason if rejected.

3. NOTIFICATIONS

Users will receive updates through:

- Portal notifications
- Email communication

4. ONCE APPROVED

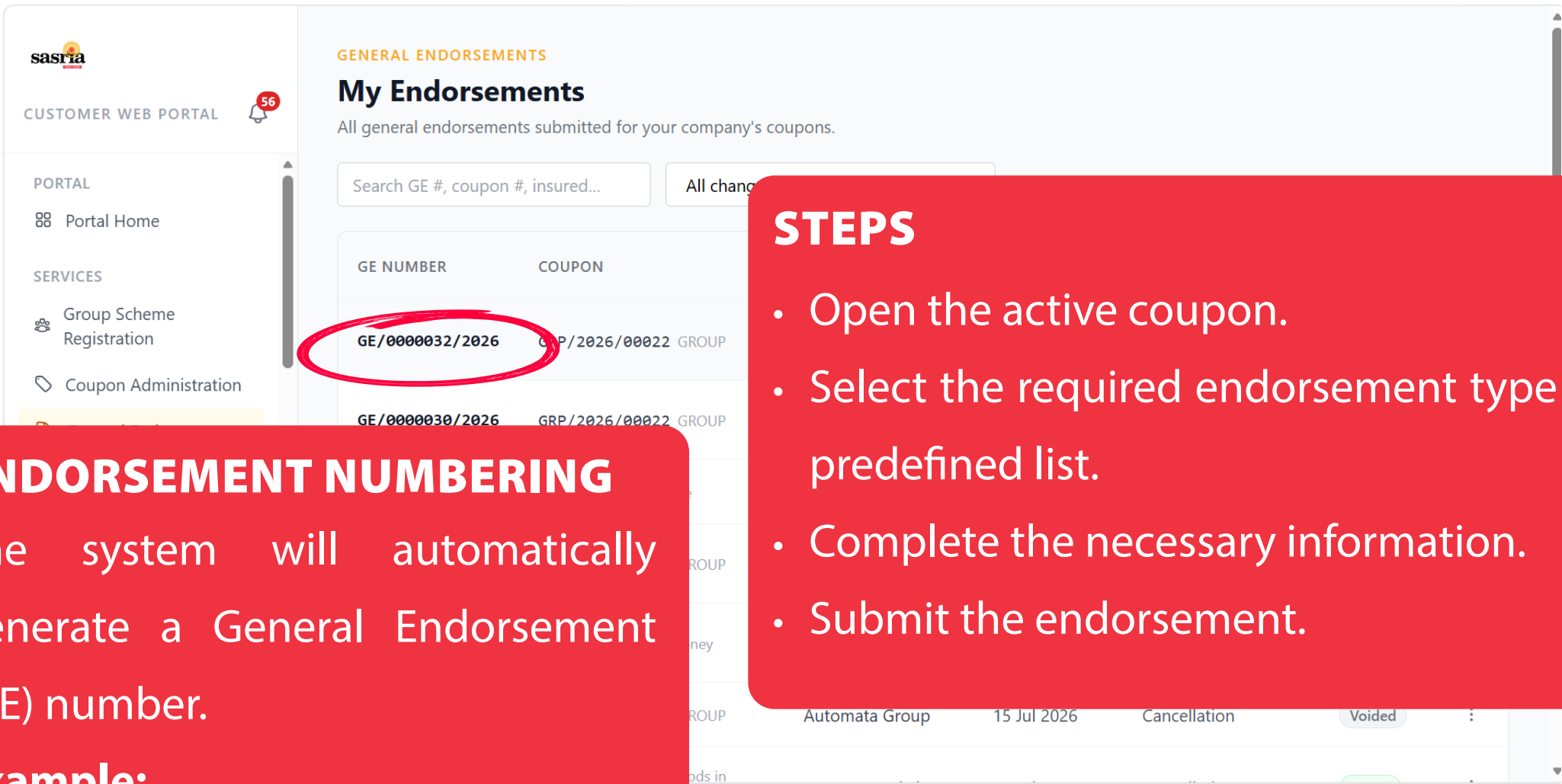
- Upon approval:
- The group scheme becomes active.
- A master coupon is automatically generated.
- The master coupon will be used for future endorsements relating to the scheme.

|            |               |            |          | MASTER COUPON  |      |
|------------|---------------|------------|----------|----------------|------|
| SAS-000036 | Renasa        | Commercial | Rejected | —              | View |
| SAS-000032 | Old Mutual 22 | Commercial | Approved | GRP/2026/00022 | View |
|            | and Domestic  |            | Approved | GRP/2026/00012 | View |
|            |               |            | Approved | GRP/2026/00011 | View |
|            |               |            | Approved | GRP/2026/00010 | View |
|            | and Domestic  |            | Approved | GRP/2026/00002 | View |
|            | and Dome      |            |          |                |      |

# 10. ENDORSEMENTS AND RENEWALS

## CREATING AN ENDORSEMENT

Endorsements can only be performed on active coupons.



### STEPS

- Open the active coupon.
- Select the required endorsement type from the predefined list.
- Complete the necessary information.
- Submit the endorsement.

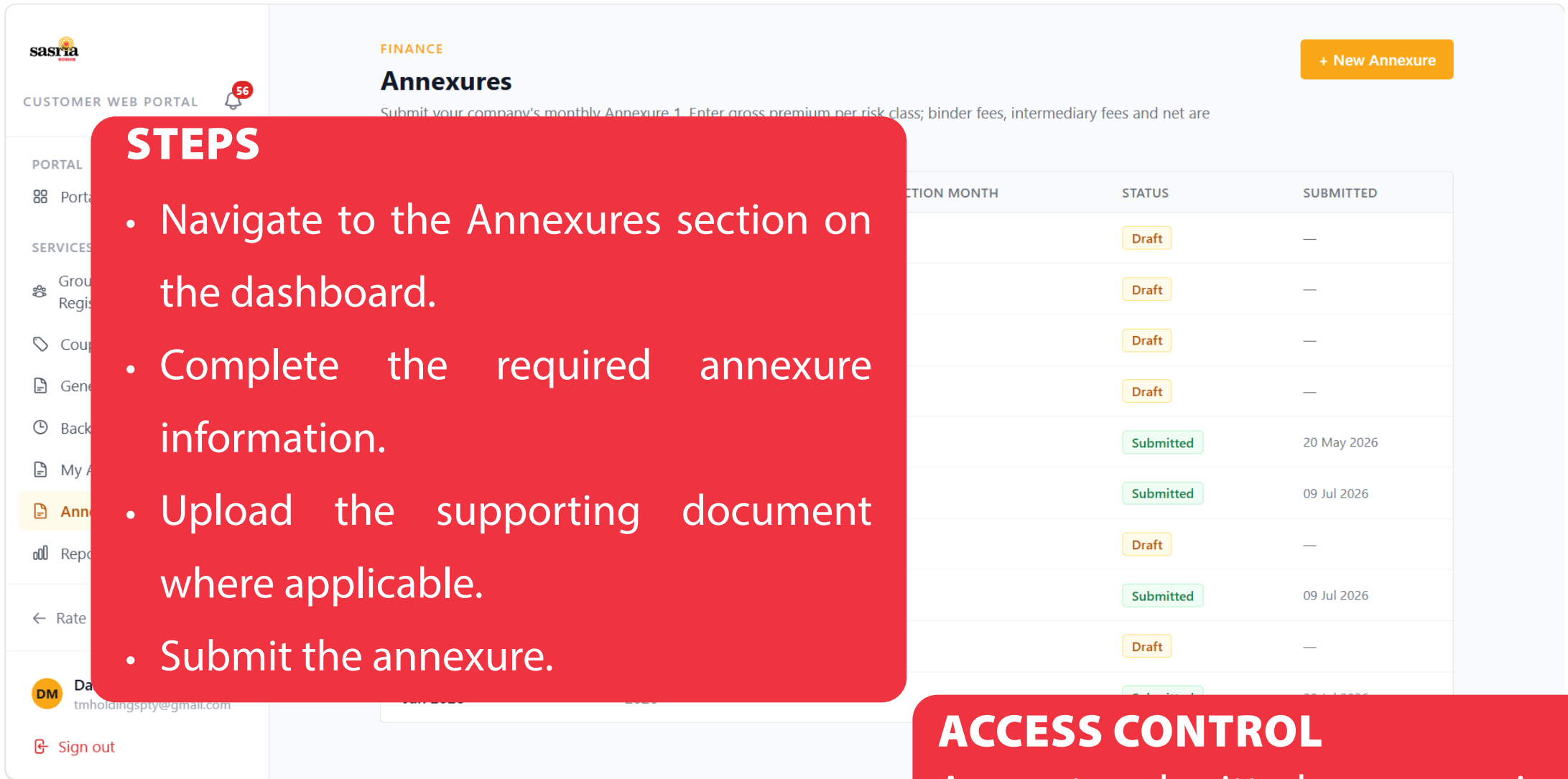
### ENDORSEMENT NUMBERING

The system will automatically generate a General Endorsement (GE) number.

**Example:**  
**GE/0000001/2026**

# 11. ANNEXURE SUBMISSION

## UPLOAD MONTHLY ANNEXURES



### STEPS

- Navigate to the Annexures section on the dashboard.
- Complete the required annexure information.
- Upload the supporting document where applicable.
- Submit the annexure.

### ACCESS CONTROL

Access to submitted annexures is restricted to:

- Approved Sasria Finance users
- Authorised system administrators

## ACCEPTED FILE FORMATS

The following file types may be uploaded:

**01**

DOC

**02**

DOCX

**03**

XLS

**04**

XLSX

**05**

PDF

**06**

PNG

**07**

JPG

**08**

JPEG

**09**

PPT

**10**

PPTX

## 12. QUERIES AND SUPPORT

### ACCEPTED FILE FORMATS

#### STEPS

- Select Queries from the dashboard.
- You will be redirected to the Sasria website query page.
- Complete the required information.
- Submit your query.

#### QUERY LINK

[www.sasria.co.za/contact-us/#queries](http://www.sasria.co.za/contact-us/#queries)

## 13. IMPORTANT REMINDERS

- Verify the policy cycle status before processing transactions.
- Active coupons cannot be edited.
- Backdating requests require Sasria approval when allowable limits are exceeded.
- Group schemes require underwriting approval before activation.
- Monitor dashboard notifications regularly for updates and approvals.
- Keep your login credentials confidential and secure.

## 13. SUPPORT

For technical assistance or system-related queries, please contact the Sasria System support: IT Desk,  
[itsupport@sasria.co.za](mailto:itsupport@sasria.co.za)

OR

Underwriting support  
[contact\\_underwriting@sasria.co.za](mailto:contact_underwriting@sasria.co.za)

