

ULA Portal Guide

Here at United Legal Assistance, we appreciate how important it is for our broker partners to have a clean, quick and simple online portal to use. With this in mind, we have spent a considerable amount of time and resource on creating the best possible solution for you to use as regularly as you see fit; however, we also appreciate that sometimes we all require a little help and direction when it comes to technology!

Hopefully the following guide covers all queries you may have, however, if there is anything you are unsure of at all, please do not hesitate to contact us and we would be glad to help.

Contents

1. [Admin Accounts](#)
 - a. [Policy Invoices](#)
 - b. [Dashboard Page](#)
2. [Password Reset](#)
3. [Claims Reporting](#)
4. [Claims Tracking](#)
5. [Policies](#)
 - a. [Viewing All Policies](#)
 - b. [Incepting a Policy](#)
 - c. [Editing/Deleting a Policy](#)
6. [Contact Us](#)

Admin Accounts

Every broker we work with will have at least one Admin account, allowing the particular user to create access all policy invoices and create a bespoke dashboard page, allowing them to view various claims and policy stats at a glance.

Policy Invoices

Policy Invoices are sent on the 1st of each month. They can be sent to any recipient you desire, simply let your Account Manager know where you would like them to go and we will make the amendment internally.

In order to view your policy invoices online, simply select the **Invoices** tab at the top of the page, which will take you to this screen:

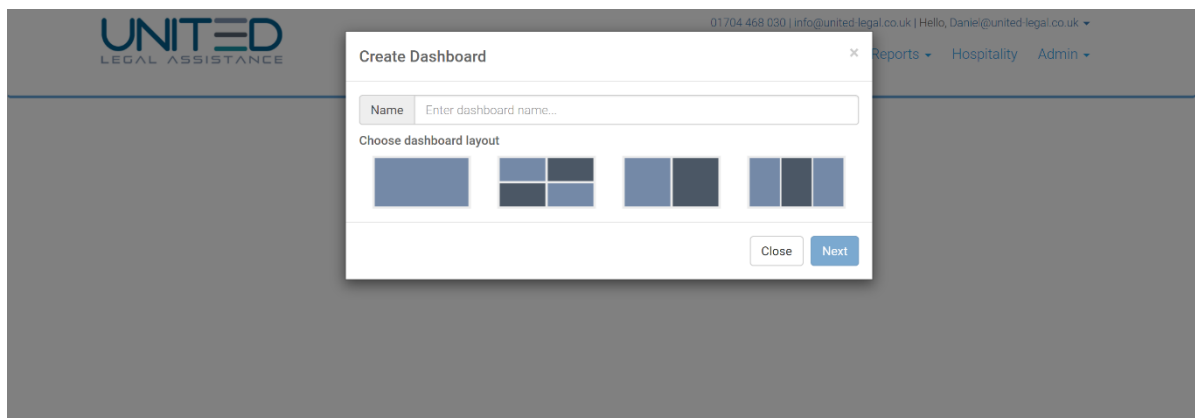
Invoices

Invoice Month	Invoice Number	Total Payment	Payment Due
April 2020	0063		31/05/2020
March 2020	0062		30/04/2020
February 2020	0061		31/03/2020
January 2020	0060		29/02/2020
December 2019	0059		31/01/2020
November 2019	0058		31/12/2019
October 2019	0057		30/11/2019
September 2019	0056		31/10/2019
August 2019	0055		30/09/2019
July 2019	0054		31/08/2019

As you can see from the above, all invoices, new and historic, are available on this page. You can open any of them by selecting the corresponding **Invoice Number** e.g. for April 2020 you would click 0063 – the invoice then opens as a PDF for you to print/download/send to your accounts team.

Dashboard Page

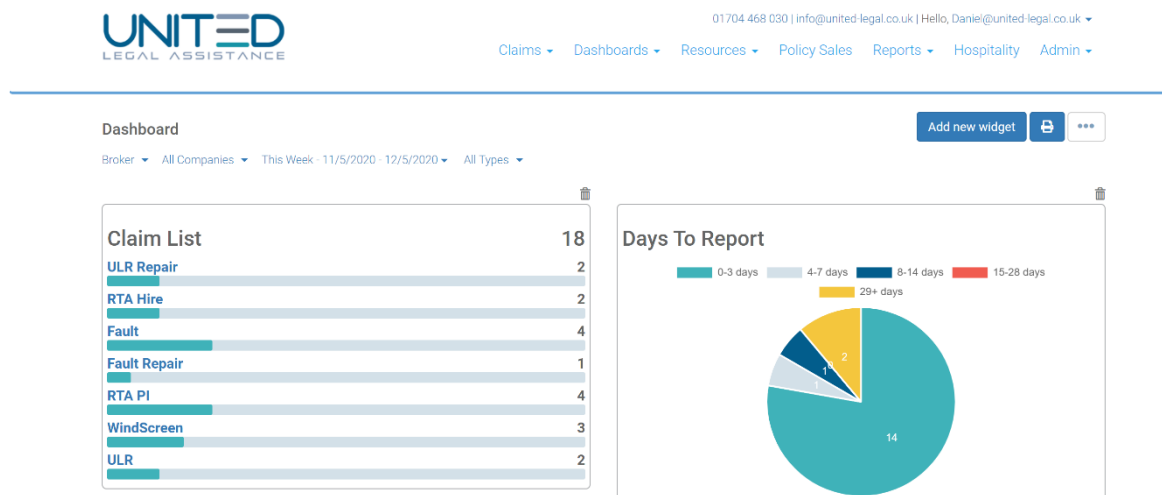
The Dashboard page is one of our newer, more innovative updates allowing you to view a wide variety of statistics at a glance, but with the added functionality of allowing users to tailor what information they wish to see. The page is available via the **Dashboard** tab at the top of the screen, and will bring you to the following:



The above screen allows you to choose the layout of your dashboard. Once you have selected your preference, you can choose from the following data sets to populate your dashboard:

- ❖ Top 10 Agents Chart
- ❖ Claims List Chart
- ❖ Policies Sold Chart
- ❖ Days to Report Chart

The resulting dashboard will then present the following screen:



Obviously the data in the above image has been created for demonstrative purposes, however your dashboard will populate with live and accurate data depending on your choices.

Password Reset

One of the more frequent requests we receive at ULA is for a password reset for any number of accounts. Resetting your password is extremely simple; click the **Password Reset** button, circled on the below image, enter your email address linked to the account on our portal and you will then receive an email from our info@united-legal.co.uk address with a link for you to log in and create a new password:

PLEASE NOTE: the email may go in to your junk folder!



[Proclaim FileView](#) [Log in](#)

Client login

A screenshot of the client login interface. It features a text input field containing the email address "daniel@united-legal.co.uk", a password input field with masked characters, a blue "Login" button, and a link labeled "Forgot Password?". The "Forgot Password?" link is circled in red.

Claims Reporting

As previously mentioned, at United Legal Assistance we appreciate the importance of efficiency and convenience for our broker partners. As such, claims can be reported to us via your dedicated claims line, via our claims@united-legal.co.uk email address, or via the **Claims** tab at the top of the portal, followed by the **Report a Claim** of the options then presented. This will provide you with the below screen, where you can fill in as much information as possible, before submitting the claim:



01704 468 030 | info@united-legal.co.uk | Hello, Daniel@united-legal.co.uk ▾

[Claims ▾](#) [Dashboards ▾](#) [Resources ▾](#) [Policy Sales](#) [Reports ▾](#) [Hospitality](#) [Admin ▾](#)

Client Details

Name*	
Postcode	Q
Address1	
Address2	
City	
Telephone number*	
Mobile number	
Work number	
Email	
Date of Birth	📅
NI Number	

Client Vehicle/Insurance Details

Registration	
--------------	----------------------

Once submitted, the details you have entered will automatically populate in to a file for one of our claims handlers to pick up. They will review the file before calling the client and working on the case immediately.

Claims Tracking

One of the most significant benefits to our online portal is it's live, claims-tracking facility. This provides all of our brokers with a live screenshot of our file handlers' exact notes – we cannot edit them and neither can you – thus providing complete transparency of our work. You can access our notes but also any documents or images that we receive or send, be it from the client, insurer or any other person involved in the claim. You can access this page via the **Claims** tab at the top, followed by the **View Claims** option:



01704 468 030 | info@united-legal.co.uk | Hello, Daniel@united-legal.co.uk ▼

[Claims ▼](#) [Dashboards ▼](#) [Resources ▼](#) [Policy Sales](#) [Reports ▼](#) [Hospitality](#) [Admin ▼](#)

Claim list

Show 10 ▼ entries

Live cases

Filter by solicitors: All cases ▼

Search by: CaseNo ▼

Q

Case No	Date Added	Client Name	Accident Date	Vehicle Reg	Case Status	
+ 12038.1 ⓘ	14/07/2014 - 00:00		12/07/2014	-	Claim Reported	View Notes
+ 12033.1 ⓘ	08/07/2014 - 00:00		08/07/2014	-	Claim Reported	View Notes
+ 12021.1 ⓘ	30/06/2014 - 00:00		28/06/2014	-	Claim Reported	View Notes
+ 12015.2 ⓘ	25/06/2014 - 00:00		24/06/2014	-	Claim Reported	View Notes
+ 12015.1 ⓘ	25/06/2014 - 00:00		24/06/2014	-	Claim Reported	View Notes
+ 12011.1 ⓘ	23/06/2014 - 00:00		23/06/2014	-	Claim Reported	View Notes
+ 12010.1 ⓘ	12/06/2014 - 00:00		06/06/2014	-	Claim Reported	View Notes

If you want to add a note to a particular file, you can simply contact the relevant handler (details are provided within each claim screen) with the note you want adding, and they will then action this on to the respective claim file.

The summary screen of any claim appears as follows:

Claim Summary

Claim Details

Transfer Case

Back to List

General Details	
Case Number	12021.1
Internal Case Number	43/352
Client Name	
Driver Name	-
Vehicle Registration	-
Accident Date	28/06/2014
Accident Type	-
Accident Details	My vehicle was parked up over the weekend and come back on Monday with a note on the windscreen to say he has hit the mini bus. TP1 has left note admitting full fault.
Injuries	3
Liability Status	-
File Handler	-
Handler Direct Dial	-
Handler E-mail	-

Claim Details	
Claim Received	30/06/2014 00:00
File closed	-
Status	Claim Reported
Client Cover	-
Vehicle Driveable	-
Days to Report Accident	-
Solicitor	-
Garage	-
Booking In Date	-
Repair Start Date	-
Est Completion Date	-
Completion Date	-
Hire Car Company	-
Hire Start Date	-
Hire End Date	-
Additional Info	-

Policies

Viewing Policies

When looking to view our policy list, simply click on the **Policies** tab at the top and this will take you to the below screen.

As you can see, the landing screen is the “Favourites” page, which will initially be blank. This screen will automatically populate as you start to sell our policies, with your most frequent policies appearing under this “Favourites” heading. However, in order to view all policies you have access too, simply click the **Favourites** drop down and then select **All** – you will now be able to see every policy that your account manager has agreed to provide you with.

Both the IPID and Policy Wording are available via the hyperlinks with the same titles. The price at the right-hand side is the rate that ULA are charging you to sell the policy:

Claims ▾ Policies Company Invoices Policy Sales Reports Hospitality

Policies

Favourites ▾

No Policies available!

Incepting a Policy

To incept a policy, click **select** at the right-hand side of the screen and you will be taken the screen shown below:

Motor Legal Total Gold

Purchase Price	£22.50	Total policies cost	
No of policies	1	Purchase Price	£22.50
Net Retail Price	£ 22.50	Net retail	£22.50
Retail Price inc IPT	£ 25.20	Retail inc IPT	£25.20
IPT	£ 2.70	IPT	£2.70
Inception Date	12/05/2020 		
Expiry Date	Wed May 12 2021		
Your Reference			

Contact Name	Individual Company
	Mr Firstname Lastname
Phone	
Mobile	
Email	
☐ Send email to client	
Cancel Save	

The system accounts for the rate that charge you and this is displayed as the **purchase price**. You retain 100% of anything charged above this rate. The IPT is calculated automatically, again, displayed in the corresponding fields above.

Once you have entered the clients details you can email a schedule directly to the client by inserting their email address in the **Email** field, or you can put your own address in to receive the schedule via PDF, before distributing it to the client yourself.

Once you click **Save** at the bottom, the policy is incepted.

Editing/Deleting a Policy

Once you have completed the above step your inception policy will appear in the **Policy Sales** tab, which will give you the below screen:

UNITED
LEGAL ASSISTANCE

01704 468 030 | info@united-legal.co.uk | Hello, Daniel@united-legal.co.uk ▾

Claims ▾ Dashboards ▾ Resources ▾ Policy Sales Reports ▾ Hospitality Admin ▾

Policy Sales

All Groups ▾

ULA ▾

All Types ▾

Active ▾

Customer Name / Reference

Search

Creation date	Inception date	No of Policies	Price	Retail Price	Retail Price inc Tax	Tax	Customer Reference	Policy Schedule	Company Name	Customer Name	Policy	Agent Username	
31/03/2020	01/04/2020	43	963.20	860.00	963.20	103.20	JC/LW	Policy Schedule	ULA		Motor Legal Standard	Daniel@united-legal.co.uk	Edit Delete
17/03/2020	01/04/2020	513	1436.40	1282.50	1436.40	153.90	005	Policy Schedule	ULA		Motor Legal Plus	Gavin	Edit Details Delete
17/03/2020	01/04/2020	261	700.56	625.50	700.56	75.06	006	Policy Schedule	ULA		Motor Legal Plus	Gavin	Edit Details Delete

The above screen will display all policies sold within your company, allowing all users to edit/delete policies. In order to edit a policy, simply click the **Edit** button circled in **green** on the above image – this will take you back to the **Incepting a Policy** page above; simply make the amendments required and click **Save**.

In order to delete a policy, simply click the **Delete** button circled in **red** on the above image – this will delete the policy from your system.

PLEASE NOTE – when you delete a policy, our system will credit that deleted policy to your account on that month's invoice; it is vitally important that you do not print the invoice off and make amendments by hand!

Depending on when you make the amendment, the credit note may appear on the following months' invoice, but the system will also automate this calculation for you.

Our system is entirely automated via the online portal and you can make all amendments/cancellations from here – if you are unsure as to how to do this, please contact your account manager.

Contact Us

If your query is not covered by the above, please do not hesitate to contact us. You will already have your Account Manager's details, but if for any circumstance you can not contact them, please get in touch with any of the below, who will be more than happy to help:

Head Office

Tel: 01704 468030

Email: info@united-legal.co.uk

Directors

Adam Hughes

Tel : 01704 468035

Email : adam@united-legal.co.uk

Gavin Hughes

Tel : 01704 46032

Email : gavin@united-legal.co.uk

Peter Mitchell

Tel : 01704 468039

Email : peter@united-legal.co.uk

Head of Sales

Daniel Callaghan

Tel : 07590 838202

Email : daniel@united-legal.co.uk