



# BROKER PORTAL USER GUIDE

**coface**  
FOR TRADE

# BROKER PORTAL

## USER GUIDE

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# What is the Broker Portal?

## A DEDICATED PORTAL FOR BROKERS

South Africa is one of the countries within Coface to have access to the Broker Portal, which provides you with a complete overview of your entire trade credit insurance portfolio.

(\*) Countries in which Coface is authorized to facilitate this option.



# Advantages of the Broker Portal

## Immediate access to your profile

- Main indicators (for example: loss ratio, acceptance rate).
- Contractual data, an overview of exposure and notifications of non-payment, including recoveries after indemnification.
- Exportable data in excel for current and future analysis.
- Direct access to CofaNet Essentials.

## Personalized Access Management online with your needs

The Broker Portal allows you to provide individual access based on different business rights.

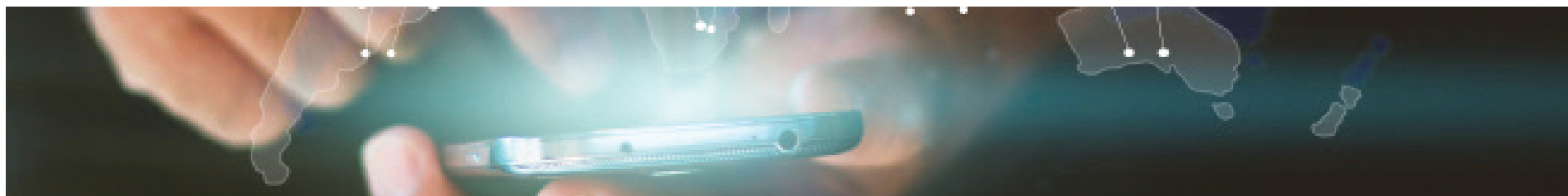
## Enhance your portfolio management

The BP Portal allows you to:

- proactive monitoring of your client;
- to organize your meetings and
- to export your data in the appropriate format to be analyzed.

## Updating features

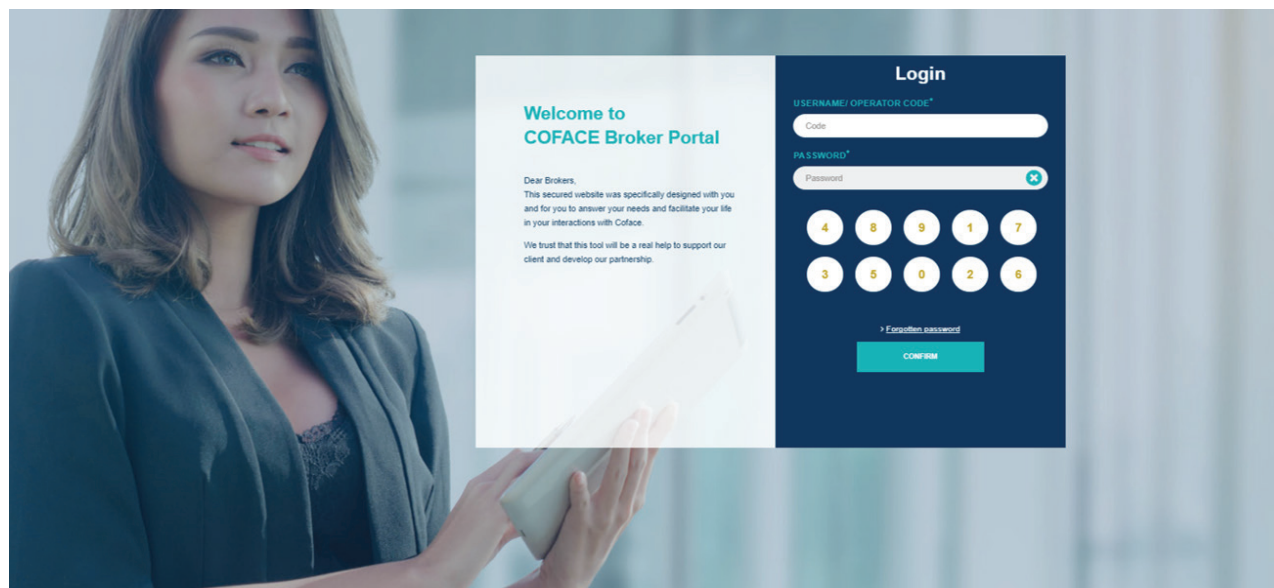
The broker portal is continuously being updated for brokers and clients, keeping updated with trends and requests.





# How to start?

**24/7** access, from wherever you are, and with any device (PC or tablet).



## Access

Enter your username and password to access the Broker Portal.

## Portal demo

Access to a quick tutorial on how to navigate the portal.

# KEY INDICATORS: MY WALL Broker Dashboard

The Broker Portal home page provides you with an overview of your activity, as well as viewing access to CofaNet Essentials for all your clients' contracts.

The screenshot shows the 'MY WALL' dashboard with the following key indicators and callouts:

- Estimated Annual Value:** 775.6k Estimated Annual Value (EUR)
- Amount of coverage granted:** 179.2 Mn Approved amount (EUR)
- Acceptance Rate:** 50.35% Acceptance Rate
- Loss Ratio Actual:** 18% Loss Ratio

Additional callouts include:

- Access to CofaNet:** Points to the 'More tools' icon in the top right.
- Estimated Annual Value:** Points to the 775.6k indicator.
- Amount of coverage granted:** Points to the 179.2 Mn indicator.
- Acceptance Rate:** Points to the 50.35% indicator.
- Loss Ratio Actual:** Points to the 18% indicator.

The dashboard also includes a sidebar with navigation options (Home, Company Info, New business, Clients, Activity, Training, Contact) and a top navigation bar with 'Notifications' and 'More tools'.

# KEY INDICATORS: MY WALL

## CGS Clients & Contracts

The screenshot displays the 'MY WALL' dashboard in the Broker Portal. The top navigation bar includes the 'coface' logo, 'Broker Portal', a user profile, 'More tools', and 'LAST CONNECTION'. A vertical sidebar on the left contains icons for Home, Company info, New business, Clients, Activity, Training, Contact, and Administration.

The main content area is divided into three sections:

- CGS clients:** A grid of three client cards. Each card shows a client ID, a 0% loss ratio, the number of signed contracts, and the estimated annual value (EAV) in EUR.
 

Client ID	Loss Ratio	Signed Contracts	Estimated Annual Value (EAV) (EUR)
001189	0 %	2	102.8 k
001334	0 %	1	63.9 k
001121	0 %	1	31.9 k
- Contracts:** A table listing active contracts with columns for Client, Contract Number, CGS Client's Name, End Date, and Loss Ratio.
 


CLIENT	CONTRACT NUMBER	CGS CLIENT'S NAME	END DATE	LOSS RATIO
South Africa	SMB		01/06/2021	0%
South Africa	RTL		01/06/2021	0%
South Africa	RTL		01/06/2021	0%
South Africa	RTL		01/07/2021	52%
South Africa	RTL		01/07/2021	0%
- Customer invoices:** A section at the bottom of the dashboard, partially visible.

## MAIN INDICATORS: MY WALL

# Access to your most recent contracts and the latest news




1/ Access the **5 most recent contracts** from the first page. We will provide with basic information, such as:

- Client name
- Contract number
- Contract End Date
- Loss Ratio

All contract information can be available by clicking on .

2/ Check the latest **news and communications** sent to clients.

Contracts					<a href="#">See all contracts</a>
CLIENT	CONTRACT NUMBER	CSB CLIENT'S NAME	END DATE	LOSS RATIO	
★ South Africa	SMB		01/06/2021	0%	
★ South Africa	RTL		01/06/2021	0%	
★ South Africa	RTL		01/06/2021	0%	
★ South Africa	RTL		01/07/2021	52%	
★ South Africa	RTL		01/07/2021	0%	

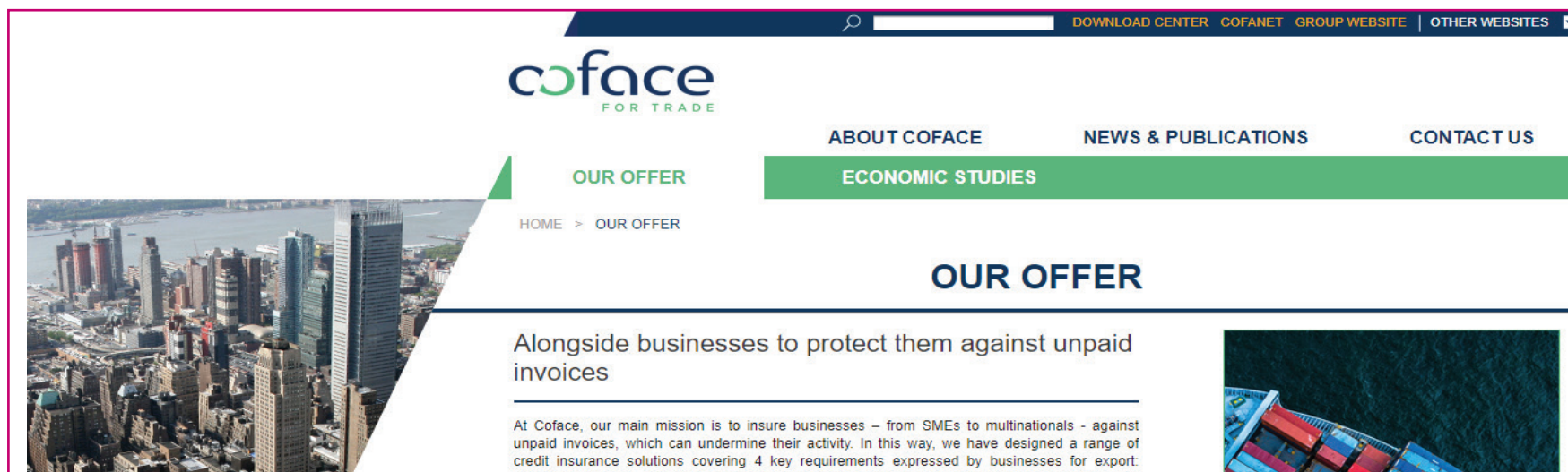
News			<a href="#">See all news</a>
 <p>13 Apr 2021 <span>0 documents</span></p> <p>Coming soon the new feature "List of activity declarations to be submitted" in the Broker Portal!</p> <p><a href="#">READ MORE</a></p>	 <p>04 Feb 2021 <span>0 documents</span></p> <p>Coming soon the new feature "list of customer invoices" in the Broker Portal!</p> <p><a href="#">READ MORE</a></p>	 <p>17 Mar 2021 <span>1 documents</span></p> <p>Coface launches the online Inquiry of Limit Use (ILU)</p> <p>As of the end of January, Coface might contact you through Cofalier to ensure your real needs and your active covers are perfectly aligned. This contract will happen through a redrafted online declaration form called the "Inquiry of Limit Use" (ILU).</p> <p><a href="#">READ MORE</a></p>	



# NEW BUSINESS

## Our Offer and Global Presence

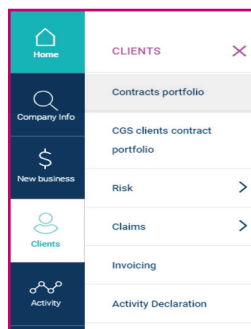
Within the New Business menu, you will have access to information about our offer of products and services, as well as to the global presence of Coface, which we will provide you with a downloadable file. We are at your disposal to expand information. Contact us!



# CLIENTS

## 1. Contract Portfolio

Within the Clients menu, you will have access to the list of your clients' contracts.




Through a simple **search box**, you will be able to locate your client using:

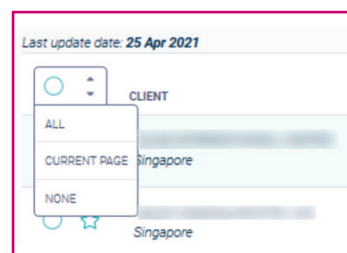
- the contract number,
- the name of the company or
- the name of the CGS Client.

CLIENT	CONTRACT NUMBER	CGS CLIENT'S NAME	END DATE	LOSS RATIO	
South Africa	SHB		01/06/2021	0%	👁
South Africa	RTL		01/06/2021	0%	👁
South Africa	RTL		01/06/2021	0%	👁
South Africa	RTL		01/07/2021	52%	👁
South Africa	RTL		01/07/2021	0%	👁

You can also locate the contract through the **full list of contracts**, where we will provide you with the name customer, contract number, end date and the loss ratio.

Using the icon , you can mark the contract as favorite, and then it will appear by default within 5 main contracts on the home page.

To access the details of each contract, click on the display icon  located in the last column from the table.



### Data export


You can download the complete list of contracts through the drop-down that you'll find at the top of the table.

You can also select each contract individually by marking the first column.

# CLIENTS

## 1. Contract Portfolio

### CONTRACT DETAILS

Contract details can be displayed by clicking on the . You are able to obtain a view of the contract details, acceptance rate and loss ratio information.

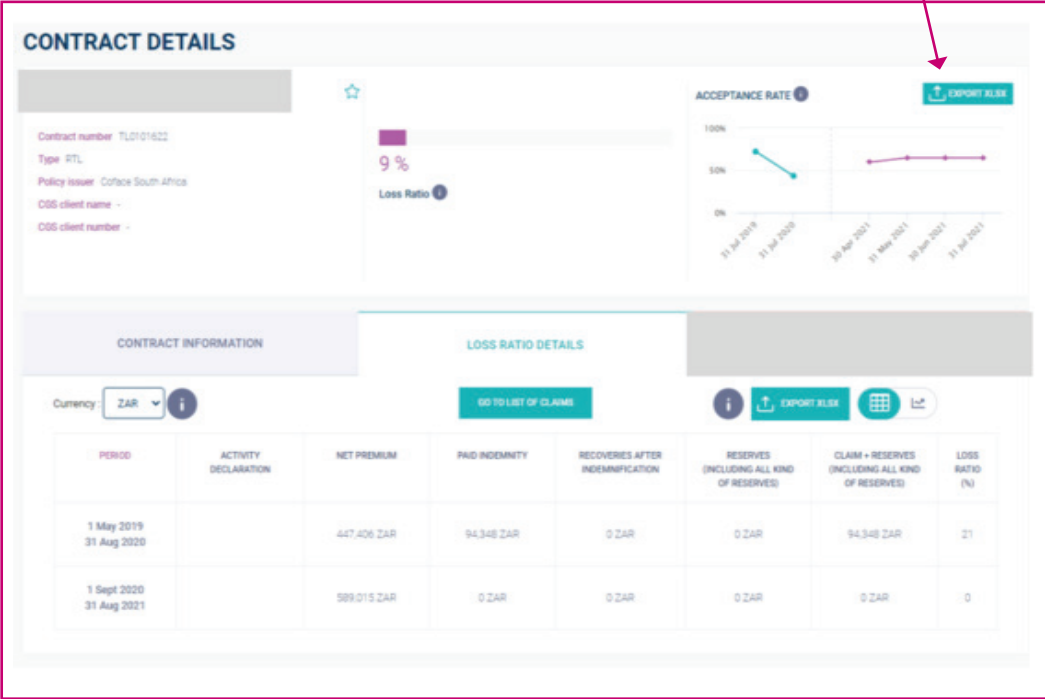
#### Loss Ratio

Provides you with claims data over the past 3 insurance periods.

#### Acceptance rate

Provides you with a graph of comparison for the current and last 3 months as well as 2 years prior. In addition, you can export this data to excel.

Possibility to export data



The screenshot displays the 'CONTRACT DETAILS' page. At the top, it shows contract information: Contract number TLD101622, Type CTL, Policy issuer Coface South Africa, and OS client details. A 'Loss Ratio' of 9% is highlighted. To the right, an 'ACCEPTANCE RATE' line graph shows data points for 31 Jul 2019, 31 Jul 2020, 30 Apr 2021, 31 Mar 2021, 30 Jun 2021, and 31 Jul 2021. An 'EXPORT XLSX' button is visible next to the graph. Below the graph, there are tabs for 'CONTRACT INFORMATION' and 'LOSS RATIO DETAILS'. The 'LOSS RATIO DETAILS' tab is active, showing a table with columns for Period, Activity Declaration, Net Premium, Paid Indemnity, Recoveries After Indemnification, Reserves, Claim + Reserves, and Loss Ratio (%). The table contains two rows of data for different periods.

PERIOD	ACTIVITY DECLARATION	NET PREMIUM	PAID INDEMNITY	RECOVERIES AFTER INDEMNIFICATION	RESERVES (INCLUDING ALL KIND OF RESERVES)	CLAIM + RESERVES (INCLUDING ALL KIND OF RESERVES)	LOSS RATIO (%)
1 May 2019 31 Aug 2020		447,406 ZAR	94,348 ZAR	0 ZAR	0 ZAR	94,348 ZAR	21
1 Sept 2020 31 Aug 2021		589,015 ZAR	0 ZAR	0 ZAR	0 ZAR	0 ZAR	0

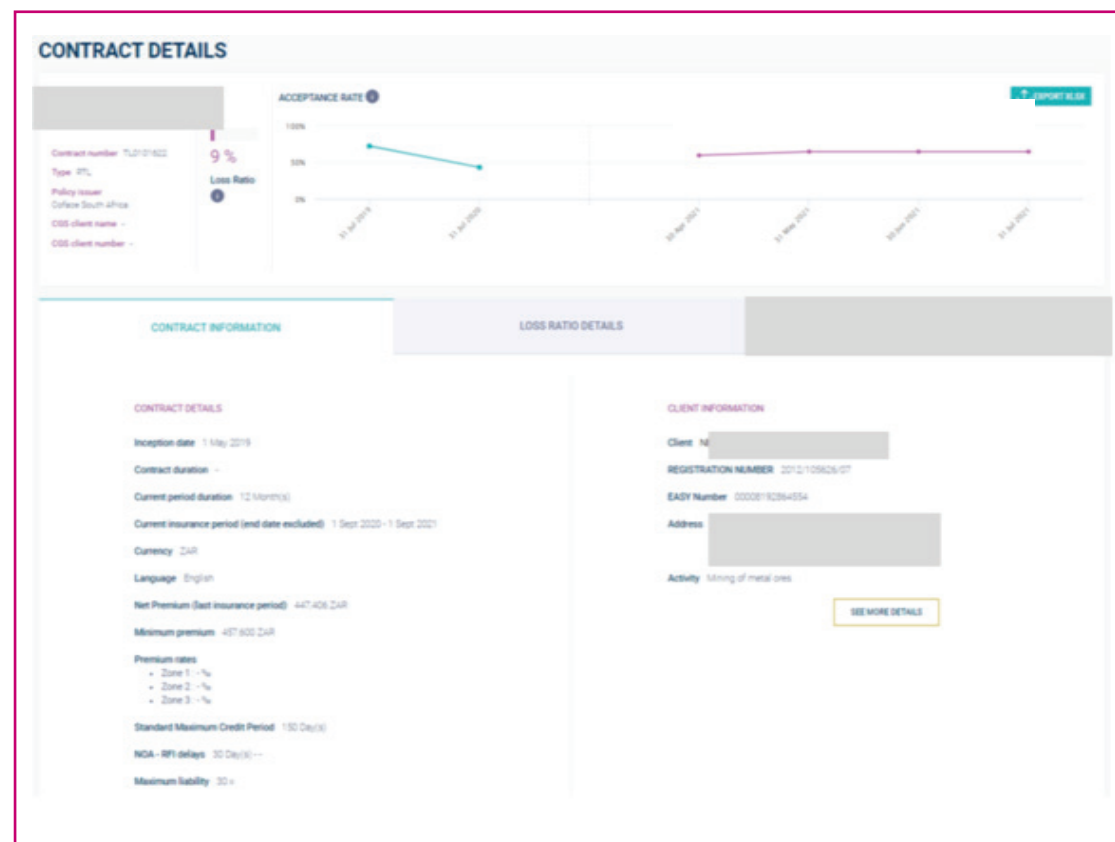
# CLIENTS

## 1. Contract Portfolio

### CONTRACT INFORMATION / DETAILS OF THE CLIENT

In addition to the acceptance rate and the loss ratio, you can access basic information of the contract:

- Inception date, current duration and insurance period
- Currency (ZAR)
- Premium invoiced in the insurance period
- Minimum premium
- Premium rates
- Maximum Credit Period (MCP)
- Notification of Overdue Account
- Maximum Liability





# CLIENTS

## 1. Contract Portfolio

### LOSS RATIO DETAILS

This provides you with details of the loss ratio, and you are able to view in a graph format or excel table.

In this tab, you can view:

- the insurance period
- net premium
- paid indemnities
- recoveries after indemnification
- reserves
- total claims and reserves
- loss ratio

PERIOD	ACTIVITY DECLARATION	NET PREMIUM	PAID INDEMNITY	RECOVERIES AFTER INDEMNIFICATION	RESERVES (INCLUDING ALL KIND OF RESERVES)	CLAIM + RESERVES (INCLUDING ALL KIND OF RESERVES)	LOSS RATIO (%)
1 Jan 2020 31 Dec 2020		64,800 USD	0 USD	0 USD	0 USD	0 USD	0
1 Jan 2021 31 Dec 2021		34,000 USD	0 USD	0 USD	0 USD	0 USD	0

### Loss ratio calculation

**Claims Paid + Reserves - Recoveries**

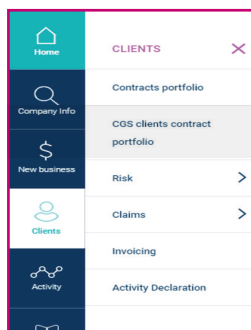
**Net Premium**



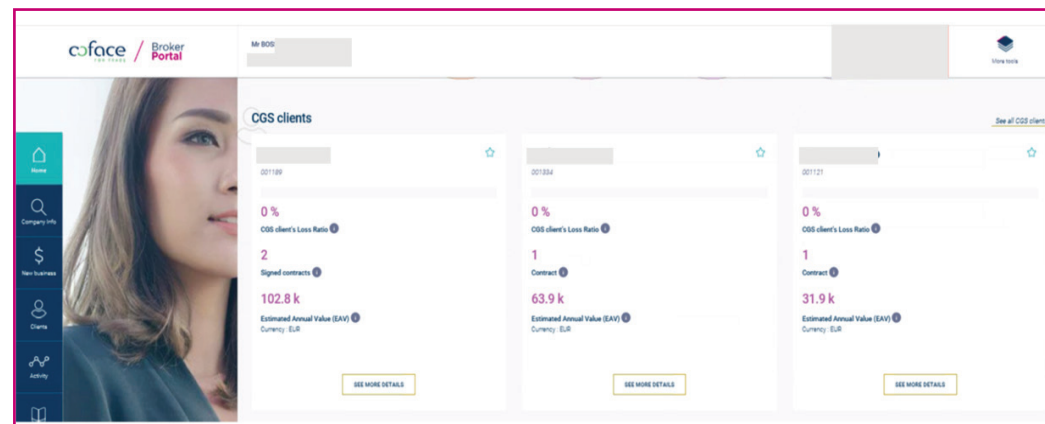
# CLIENTS

## 2. CGS Client Portfolio

From the “Clients” Menu, you can have direct access to your CGS clients.



Use the search box to easily find your CGS client.



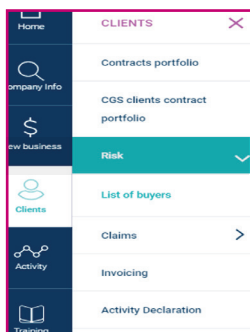
The following data can be reviewed:

- Loss Ratio
- Signed Contracts
- Estimated Annual Value (always stated in Euros)

# CLIENTS

## 3. Risks: Buyers List

Within the Clients menu, you can access a specified list of buyers across your whole portfolio or contract.



It is a brilliant tool that allows you access to all credit decisions on your clients.

The filters can be used to customize your search as per your needs.

**The possibilities are vast!**

You can also export the data to excel.

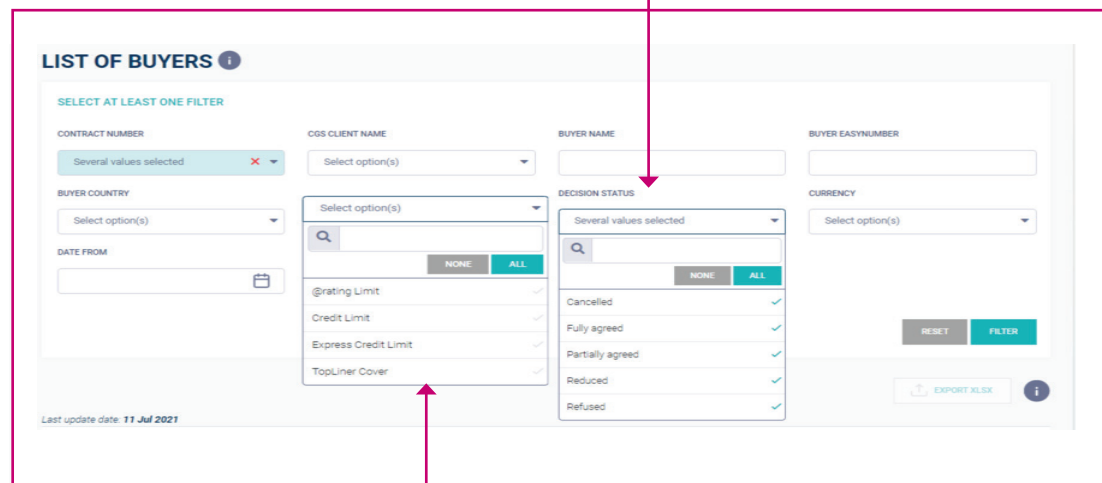
Export data

152 results 20 results per page EXPORT XLSX

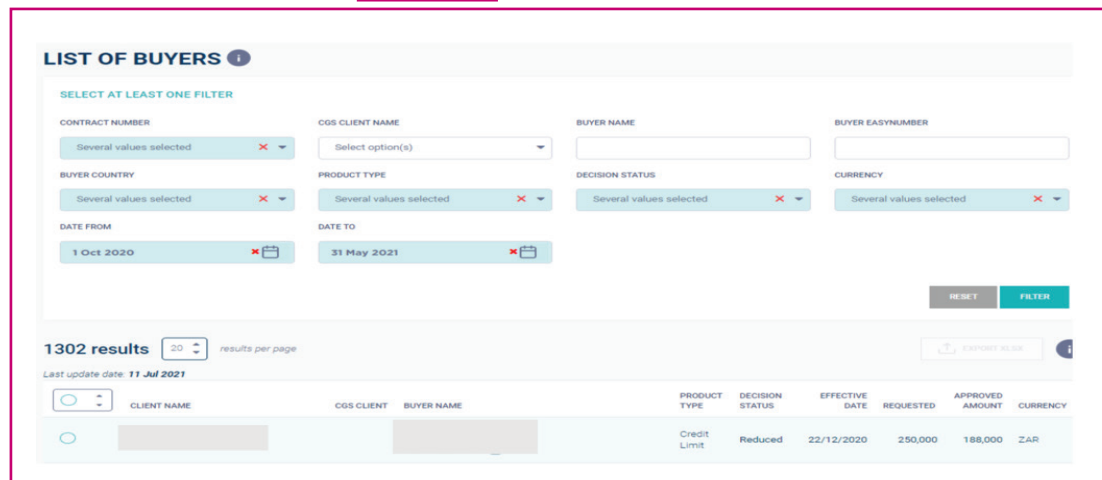
Last update date: 25 Apr 2021

CLIENT NAME	CGS CLIENT	BUYER NAME	PRODUCT TYPE	DECISION STATUS	EFFECTIVE DATE	REQUESTED	APPROVED AMOUNT	CURRENCY
			Credit Limit	Partially agreed	01/07/2020	150,000	45,000	USD
			Credit Limit	Fully agreed	17/09/2020	50,000	50,000	USD
			Credit Limit	Fully agreed	01/07/2020	200,000	200,000	USD

Accepted (partial or total)  
Cancelled  
Rejected  
Reduced



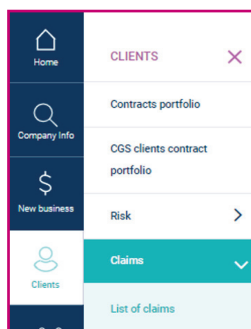
Credit limit



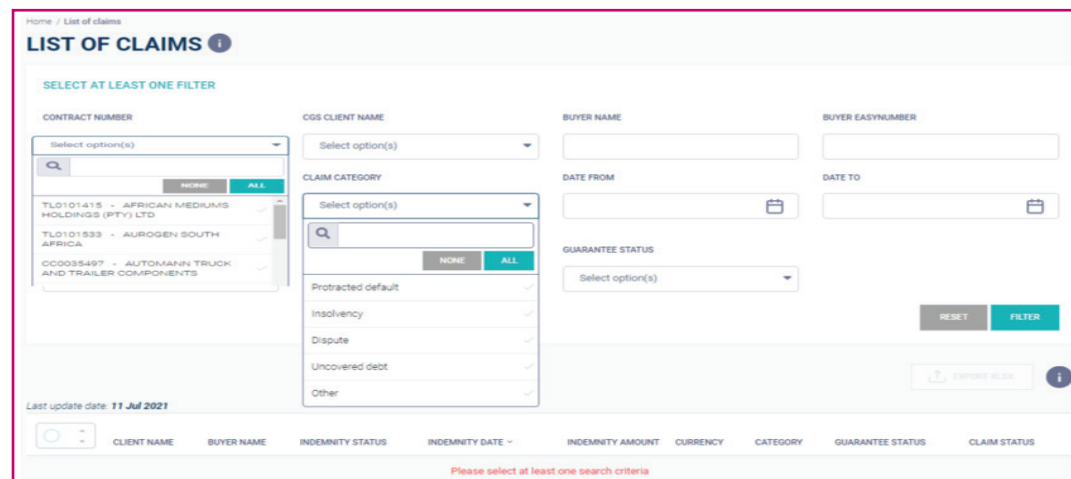
# CLIENTS

## 4. List of Claims

Within the Clients menu, you will have access to a list of claims submitted.



Similar to the risk feature, it allows you access to all claims notifications.



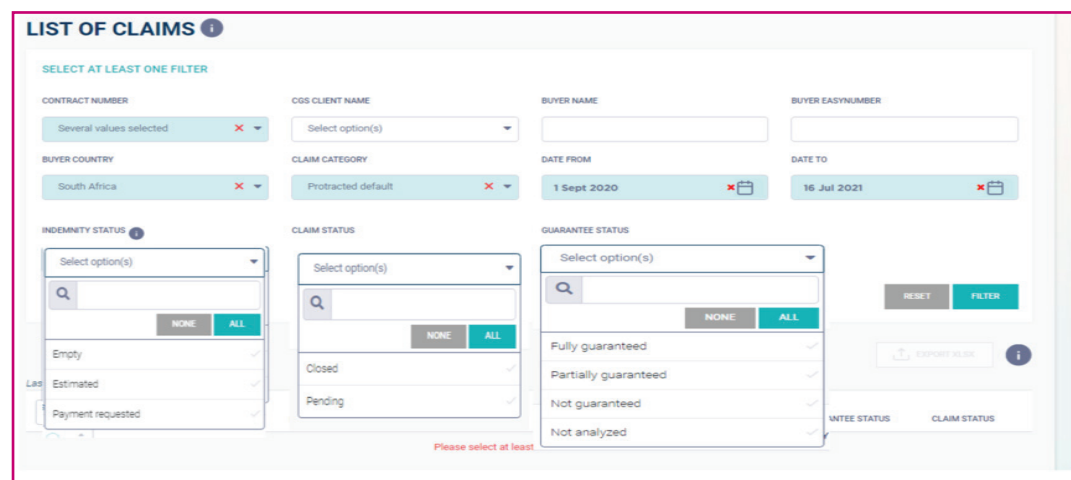
You are able to view the list of claims filtered to a specific country and buyer. Data can also be exported for ease of management.

Export data

125 results 20 results per page EXPORT ALL

Last update date: 25 Apr 2021

CLIENT NAME	CGS CLIENT	BUYER NAME	INDEMNITY STATUS	INDEMNITY DATE	INDEMNITY AMOUNT	CURRENCY	CATEGORY	CLAIM STATUS
	TPV Group		Payment requested	15/01/2019	26,119.8	USD	Protracted default	Closed
	TPV Group		Payment requested	15/01/2019	270,000	USD	Protracted default	Closed
	TPV Group		Payment requested	31/05/2019	2,357,181	INR	Protracted default	Closed





# CLIENTS

## 4. List of Claims

### LIST OF CLAIMS i

**SELECT AT LEAST ONE FILTER**

**CONTRACT NUMBER**

Several values selected ✕

**CGS CLIENT NAME**

Select option(s) ▼

**BUYER NAME**

**BUYER EASYNUMBER**

**BUYER COUNTRY**

Several values selected ✕

**CLAIM CATEGORY**

Several values selected ✕

**DATE FROM**

1 Sept 2020 ✕ 📅

**DATE TO**

16 Jul 2021 ✕ 📅

**INDEMNITY STATUS i**

Several values selected ✕

**CLAIM STATUS**

Several values selected ✕

**GUARANTEE STATUS**

Several values selected ✕

RESET
FILTER

---

**10 results** 20 results per page EXPORT XLSX i

Last update date: **11 Jul 2021**

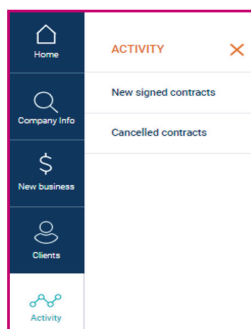
	CLIENT NAME	BUYER NAME	INDEMNITY STATUS	INDEMNITY DATE	INDEMNITY AMOUNT	CURRENCY	CATEGORY	GUARANTEE STATUS	CLAIM STATUS
<span style="border: 1px solid #ccc; border-radius: 50%; width: 15px; height: 15px; display: inline-block;"></span>		R.K.G FRUITS CO. LTD <small>Mauritius 00007368659652 <span style="font-size: 0.8em;">🔗</span></small>	Payment requested	12/03/2021	2,624,306.15	ZAR	Protracted default	Fully guaranteed	Pending

If you click on the icon it will display the company details, only for export countries due to POPIA. South African companies' information is confidential.

# CLIENTS

## 5. Activity

Within the Clients menu, you will have access to the activity tab.



**This allows you access to newly signed contracts and cancelled contracts.**

**NEW SIGNED CONTRACTS**

Keywords (Please type a CONTRACT NUMBER, a COMPANY or a CGS client NAME to filter the list)

search

4 results 20 results per page

Last update date: 11 Jul 2021

CLIENT	CONTRACT NUMBER	CGS CLIENT'S NAME	START DATE	
[REDACTED]	[REDACTED]	[REDACTED]	01/12/2020	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	01/11/2020	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	01/11/2020	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	01/12/2020	[REDACTED]

**CANCELLED CONTRACTS**

Keywords (Please type a CONTRACT NUMBER, a COMPANY or a CGS client NAME to filter the list)

search

10 results 20 results per page

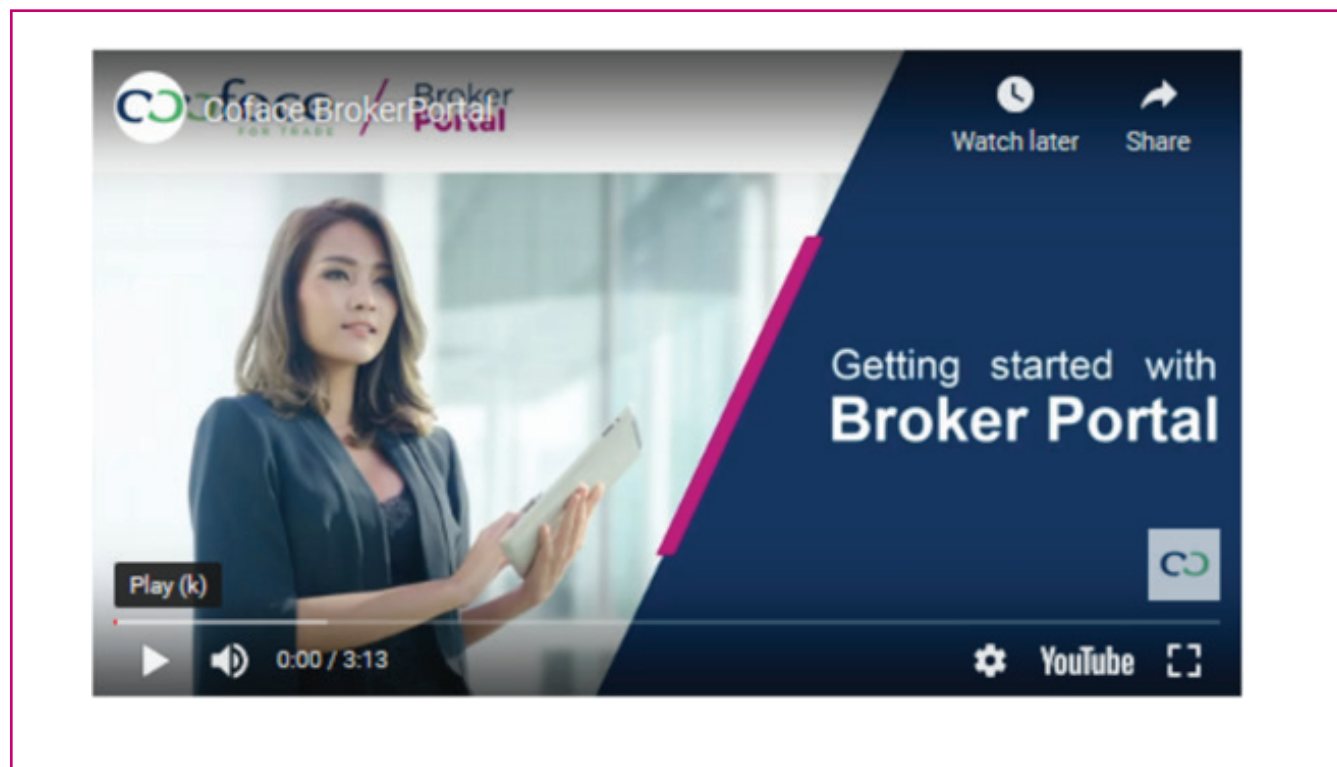
Last update date: 11 Jul 2021

CLIENT	CONTRACT NUMBER	CGS CLIENT'S NAME	CANCELLATION DATE	
[REDACTED]	TL0100745 RTL	[REDACTED]	30/11/2020	[REDACTED]
[REDACTED]	TL0101973 RTL	[REDACTED]	30/11/2020	[REDACTED]
[REDACTED]	TL0102000 RTL	[REDACTED]	31/10/2020	[REDACTED]

# TRAINING

## Broker Portal in 3 minutes

To help you get started, we suggest you watch the video below.



## CONTACT

# At your disposal to help you

Coface is available across the world.



**FOR ANY ENQUIRIES ABOUT  
BROKER PORTAL, YOUR  
REGULAR CONTACT WILL BE  
AT YOUR DISPOSAL.**

 [www.cofaceza.com](http://www.cofaceza.com)

 [info.za@coface.com](mailto:info.za@coface.com)