

Insurance Portal FAQs



Insurance Portal



Insurance Portal FAQs

How do I use Insurance Portal (IP)?

- Click on 'Insurance Portal Guide' on navigation bar. You will be directed to a video library for guidance.

What do I do, if my Insurance Portal user ID is locked?

- Your Insurance Portal ID will get locked if you enter incorrect password thrice. To unlock, please contact insuranceportal.helpdesk@bajajfinserv.in

What do I do, if Insurance Portal is not working on Sales One App?

- As a first step, please check your network strength or clear your cache. If the issue persists, please contact insuranceportal.helpdesk@bajajfinserv.in

Can I buy an Insurance Product for myself using Insurance Portal?

- Yes, you can buy General and Life Insurance products like, Four-wheeler Insurance, Two-wheeler Insurance, Life Insurance, Health Insurance, etc.

Which Insurance products can I offer my Friends, Family, Relatives, Neighbours using Insurance Portal?

- You can offer/sell Health Insurance & Motor Insurance products.
- Both product categories can be accessed under 'General Insurance' tab on navigation bar.



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Can I generate leads/refer my Friends, Family, Relatives, Neighbour for an Insurance Product?

- Yes, if you are facing trouble completing the sales, you can generate a lead and a sales expert will close the sales on your behalf.

How can I create leads/refer my Friends, Family, Relatives, Neighbour?

- To create leads follow the below steps -
 - Go to 'General Insurance' on navigation bar, then select 'Create New Quotation'.
 - A drop down will appear. Select a category of product.
 - You will be directed to an Application form on Bajaj Finserv Insurance Mall.
 - You can either assist the customer to complete the full application/journey, or you can fill the first page of the application form and click on the CTA/ button (Get Quote, View Plan, Proceed, etc).
 - A lead will get generated and will be stored in Insurance Portal.

Will I get monetary benefit/sales incentive if the sales is closed by a sales expert?

- Yes, if the lead was generated by you and the sales was successful, you will get the benefit.
- To check the incentive, click on ['Incentive Calculator'](#)

Can I offer Life Insurance to my Friends, Family, Relatives, Neighbour using Insurance Portal?

- Currently you can only generate leads for Life Insurance products.
- The sales will be closed by a sales expert and you be get the benefit for successful sales.
- You can access Life Insurance products under 'Life Insurance' tab on navigation bar.



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Where can I check the leads created by me?

- To check your leads follow the below steps -
 - Go to 'General Insurance' or 'Life Insurance' tab on navigation bar.
 - Click on 'Select Product' drop down, then select the product category.
 - Click on 'Select View' drop down, then select 'My App View'.
 - Entire list of leads created by you will be displayed.

What should I do if I get the message 'No data found' in 'My App View'?

- After following the above mentioned steps, if you get the message 'No data found' under 'My App View', this means there are no leads created by you yet.
- However, if you have created leads and are still receiving the message then please contact insuranceportal.helpdesk@bajajfinserv.in

How will I come to know if the leads that I generated were closed successfully?

- To check your Individual Business report. Click on [Track My Lead](#).

Can I learn more about Insurance, so that I can make the entire sales myself?

- Yes, to learn more follow the below steps -
 - Click on 'Insurance Portal Guide' on navigation bar. You will be directed to a video library for guidance.



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Can I create multiple leads for the same customer for different products?

- Yes, you can create multiple leads for the same customer for all products for both 'General Insurance' and 'Life Insurance'.

Can I sell multiple products to the same customer?

- Yes, you can create multiple leads for the same customer for all products for both 'General Insurance' and 'Life Insurance'.

Can I resume an existing application/journey on behalf of a customer for the leads created by me?

- Yes, to resume journey follow the below steps -
 - Go to 'General Insurance' or 'Life Insurance' tab on navigation bar.
 - Click on 'Select Product' drop down then select the product category. Click on 'Select View' drop down then select 'My App View'.
 - All leads created by you will be displayed.
 - Click on the 'Application Reference ID' of the customer. The customer detail page will open.
 - Click on the 'Resume Journey' button on top panel.
 - You will be directed to Bajaj Finserv Insurance Mall, from where you can continue filling the customer's form.

Can I resume application/journey for the leads created by someone else or the customer themselves?

- No, currently you can only resume a journey if the lead was initiated by you.



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Can I make a payment on behalf of the customer?

- No, all Insurance Payments should be done only by the customer

Can I send payment link through Insurance Portal to customers?

- Yes, if the lead was created by you then follow below steps to send payment link to the customer -
 - Go to 'General Insurance' or 'Life Insurance' tab on navigation bar.
 - Click on 'Select Product' drop down then select the product category. Click on 'Select View' drop down then select 'My App View'.
 - All leads created by you will be displayed.
 - Click on the 'Application Reference ID' of the customer. The customer detail page will open.
 - Click on 'Send Quotation' button on the top panel. A pop up will appear. Click on 'Send' to send a link to the customer.
 - An SMS will be sent to the customer. Inform the customer to click on the link to continue their application on Bajaj Finserv Insurance Mall.

Can I download business report from Insurance Portal?

- Currently Insurance Portal is only a Customer Relationship Management tool.
- To check your Individual Business report. Click on [Track My Lead](#).

How can I check the Incentive Policy?

- You can check the Incentive Policy from 'Open' Platform. To check, click on [Policy \(sharepoint.com\)](#).
- Note: 'Open' Platform can only be accessed if you are logged in as an Employee.



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After successful sales, can I share copy of policy document with the customer?

- Yes, if the lead was created by you then follow below steps to send Policy Document to the customer -
 - Go to 'General Insurance' or 'Life Insurance' tab on navigation bar.
 - Click on 'Select Product' drop down then select the product category. Click on 'Select View' drop down then select 'My App View'.
 - All leads created by you will be displayed.
 - Click on the 'Application Reference ID' of the customer. The customer detail page will open.
 - Click on 'Get COI' button on the top panel. COI gets downloaded
 - Please note, The Policy document will also be sent by our Insurance company partners on customer's email and mobile number

Where can I check the Policy status?

- To check the status of policy follow the below steps -
 - Go to 'General Insurance' or 'Life Insurance' tab on navigation bar.
 - Click on 'Select Product' drop down then select the product category. Click on 'Select View' drop down then select 'My App View'.
 - All leads created by you will be displayed.
 - Click on the 'Application Reference ID' of the customer. The customer detail page will open.
 - On the left hand side bar select 'Policy Details'.

Some button like, 'Dashboard', 'Reports', 'Contest', 'Leaders' are not working. Should I contact helpdesk?

- Not required. Some of Insurance Portal functionalities are still in enhancement. Once the button are accessible, you will be informed.

Thank you



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insuranceportal.helpdesk@bajajfinserv.in