

# Guide 13 - Policy details

## Accessing the policy details

Atradius Atrium provides you with an overview of all policy related information in one place, with a number of self-service options making policy management easier to complete. If you have selected a policy from the top of the Credit management page, you can view its policy details by selecting the 'View policy' link.

Selected policies				
Policy ID	Customer name	Renewal date	Status	
541170	ASCOTT BUILDING	01/07/2020	Live	<a href="#">&gt; Select policy</a> <a href="#">&gt; View policy</a>
Country	Currency			
Andorra	EUR			



Read Guide 2 - Credit management to learn more about viewing Credit management details for a selected policy

You can also select the 'View policy' link for a specific policy on the Policies page, which can be found in the left hand navigation menu. Alternatively, the Policy ID can be selected when it is displayed in context of a credit limit, non-payments case or communication alert.

Policy ID	Customer name	Renewal date	Status	
548714	ASCOTT CARPENTRY	01/09/2020	Live	<a href="#">&gt; View policy</a>
Country	Currency			
Andorra	EUR			



Read Guide 6 - Policies to learn more about viewing details for a specific policy from the Policies page



Please note that if you have access to more than one policy, you will first need to select a policy by clicking the Change selection button. You can also set a default policy under the Account defaults page for the specific policy to be shown automatically.

Selected policies	
Policy ID	
All policies	<a href="#">Change selection</a>



Read Guide 12 - Account settings to learn more about how to set a default policy

## Policy overview

On the Policy details page, you will see a summary of your policy, with a number of category tabs allowing you to view additional details or perform specific tasks relating to the policy.

### Policy detail

The 'Policy details' page allows you to view details of your selected policy and manage policy administration tasks such as declaring turnover, viewing invoices and requesting policy documentation.

ASCOTT BUILDING LTD Select insurance period 01/01/2020 - 31/12/2020 ▼

Policy ID	Declaration type	Policy type	Broker	Status
541170	Turnover policy	Atradius Modula policy	MY BROKER	<span style="color: green;">Live</span>
Customer ID	Currency	Language	Renewal date	
4262735	EUR	English	01/01/2021	

Policy requests **Declarations** Invoices

Select language  Effective from

Generate document

↻ Refresh

Filename	Language	Effective date	Requested date
You have no documents currently available to view			

## Policy summary

The policy summary panel shows important details relating to your policy, such as the Customer name, Customer ID, Policy ID and the Policy type. You will see the Declaration type that has been agreed for your policy, as well as the Currency of the policy, the Language in which the policy has been issued, the current Status of the policy and the Renewal date. Where a broker acts as an intermediary between you and Atradius, their name will also appear for the selected insurance periods where they represented you.

ASCOTT BUILDING LTD Select insurance period 01/01/2020 - 31/12/2020 ▼

Policy ID	Declaration type	Policy type	Broker	Status
541170	Turnover policy	Atradius Modula policy	MY BROKER	<span style="color: green;">Live</span>
Customer ID	Currency	Language	Renewal date	
4262735	EUR	English	01/01/2021	

By default, you will see the current insurance period is selected within the policy summary. However, you will have the option to amend this to view the policy for a historic period, allowing you to compare changes through the life cycle of your policy.

ASCOTT BUILDING LTD Select insurance period 01/01/2020 - 31/12/2020 ▼

Policy ID	Declaration type	Policy type	Broker	Status
541170	Turnover policy	Atradius Modula policy	MY BROKER	<span style="color: green;">Live</span>
Customer ID	Currency	Language	Renewal date	
4262735	EUR	English	01/01/2021	

01/01/2020 - 31/12/2020

01/01/2020 - 31/12/2020

01/01/2019 - 31/12/2019

01/01/2018 - 31/12/2018

01/01/2017 - 31/12/2017

01/01/2016 - 31/12/2016

## Policy requests

The Policy requests tab allows you to generate a copy of your policy documents directly via Atradius Atrium. By clicking on Generate document, a policy document will be created with the conditions valid from the Effective from date that has been entered. You can also receive the policy document in a different language than the one in which it was originally issued for the insurance period.

As you wait for the document to be produced, a message will appear confirming that a notification will be sent to the email address set within your User profile. The 'Refresh' option can also be selected to update the list below to show any new requests. Once the document has been fully created, you can download your policy as a PDF by selecting the file name.

Filename	Language	Effective date	Requested date
<a href="#">Policy documentation - 541170 21082020</a>	English	17/04/2020	20/08/2020



Read Guide 12 - Account settings to learn more about updating your User profile details

## Declarations


Where the conditions of your policy require you to periodically declare what has been invoiced for goods or services provided, you can directly submit declarations per buyer country via Atradius Atrium. Selecting the Declarations tab will automatically show the latest declaration period, with the option to select a different period to view previously submitted declarations or provide supplementary declarations.



Policy requests | **Declarations** | Invoices

Select declaration period:  
01/07/2019 - 30/06/2020



**Submit new declaration**

Invoice number	Invoice date	Premium	Total declared amount
--	--	--	--

To enter information in a row, select the  icon or double click the field.

To confirm changes made in the row, select the  icon. To discard changes made, select the  icon.

Nil declaration ⓘ Please enter amounts to the nearest whole unit of the appropriate currency

Country	Cover type	Payment terms	Declared amount	Premium rate %
Andorra	Credit risk	180 days	-- EUR	0.045 
Italy	Credit risk	180 days	-- EUR	0.045 

[+ Add entry](#)

Invoice text or notes

[Submit declaration](#) [Calculate](#) [Save declaration](#) [Delete](#)



Read Guide 14 - Declarations to learn more about submitting declarations

TIP

## Invoices

The Invoices tab will present you with an overview of all invoices sent to you by Atradius. For each invoice shown, an overview panel is presented which shows the type of invoice, the date that it was issued and the date it is due, the amount of the invoice and the amount that is outstanding.

Policy requests
Declarations
Invoices

▼ Advanced filters 6
Apply Filters

Paid status

All
▼

Sort by

Please select...
▼

Order by

Ascending
▼

Invoice ID 369852147	Date issued 03/02/2020  Due date 20/02/2020	Type Normal premium  Declaration period ---	Outstanding <b>2,126.02</b> (EUR)	Amount <b>2,126.02</b> (EUR)
Invoice ID 369852141	Date issued 06/02/2020  Due date 23/02/2020	Type Normal premium  Declaration period 01/12/2019 - 31/02/2020	Outstanding <b>0.00</b> (EUR)	Amount <b>2,431.35</b> (EUR)
Invoice ID 852147963	Date issued 05/02/2020  Due date 22/02/2020	Type Normal premium  Declaration period 01/12/2019 - 31/02/2020	Outstanding <b>0.00</b> (EUR)	Amount <b>-22,559.00</b> (EUR)
Invoice ID 789654123	Date issued 11/01/2020  Due date 26/01/2020	Type Normal premium  Declaration period ---	Outstanding <b>0.00</b> (EUR)	Amount <b>352.77</b> (EUR)
Invoice ID 951357482	Date issued 10/01/2020  Due date 24/01/2020	Type Normal premium  Declaration period ---	Outstanding <b>0.00</b> (EUR)	Amount <b>1,991.80</b> (EUR)

[Download](#)

Page 1 of 31 (1-5 of 153 items) | ◀ ▶ 1 2 3 4 5 ... 31 ▶ ⌕

Show 5 results per page

An invoice can be downloaded as a PDF where a document is available. Where there are multiple documents available for an invoice, these will be presented separately after selecting the 'Download' link at the bottom right of the overview panel.

**Document selection** ✕

This invoice has multiple documents. Please select one of the following documents.

[Download \(01/01/2020\)](#) [Download \(01/01/2019\)](#)

By entering the Invoice ID you will be able to find a specific invoice. You can also further refine your criteria using the advanced filters to narrow down your results. This allows you to deselect Invoice types that you do not want to be displayed, whilst a date range filter will allow you to find invoices issued within a certain time period.

Policy requests | Declarations | **Invoices**

Invoice ID  [Advanced filters](#) 6

From date:  To date:

Invoice types

- Basic claim payment
- Bonus/surcharge reconciliation
- C/L charge
- Clients proceeds of recovery
- Medium premium reconciliation
- Normal premium

[Reset filters](#) [Apply Filters](#)

The Paid status filter additionally allows you to easily identify where there may be unpaid invoices.

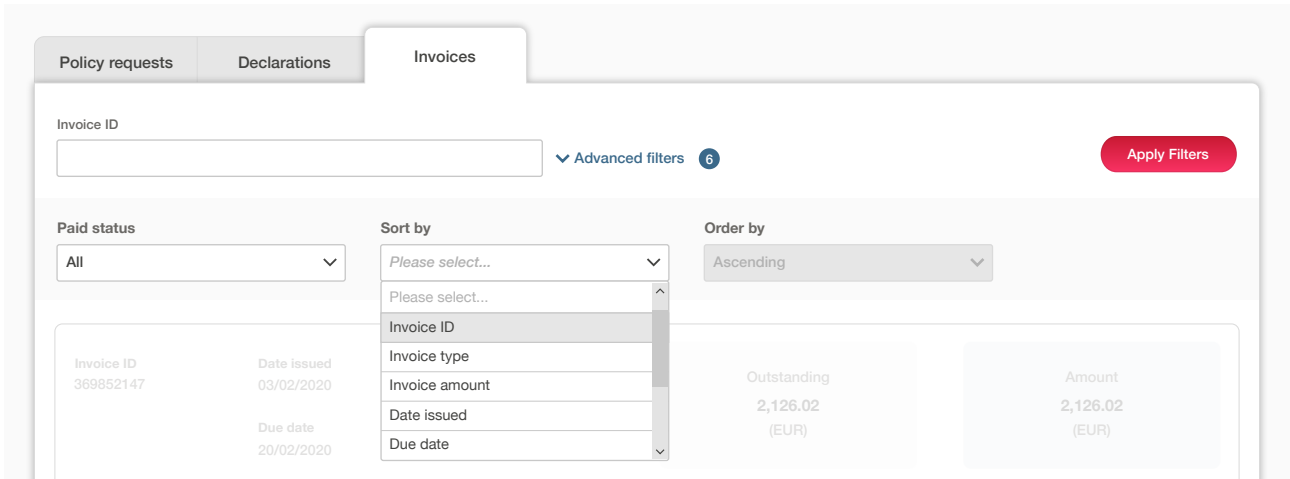
Policy requests | Declarations | **Invoices**

Invoice ID  [Advanced filters](#) 6 [Apply Filters](#)

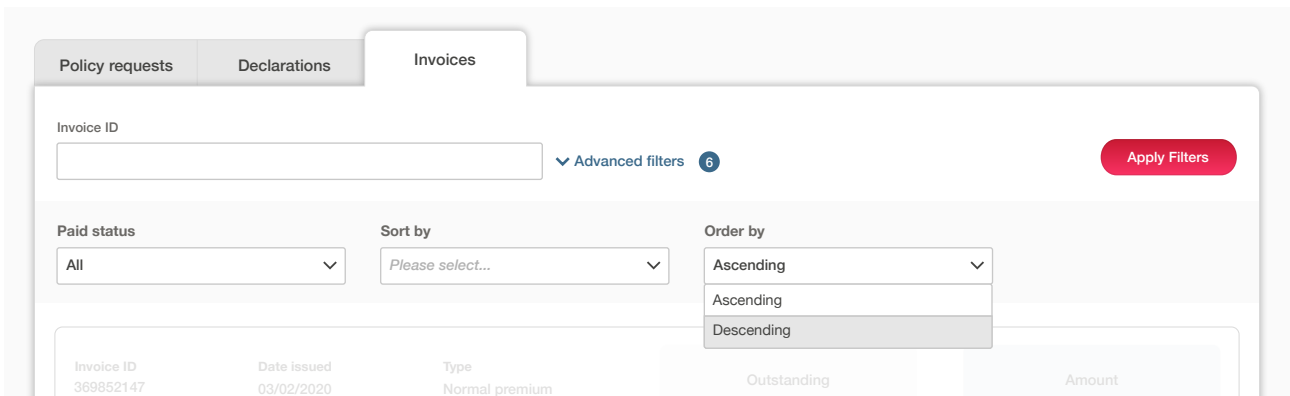
Paid status:  Sort by:  Order by:

	Type	Outstanding	Amount
369852147	03/02/2020	Normal premium	

You can sort and order how the list of invoices will appear on your screen. For example, this can be sorted by Invoice ID, Invoice type, Invoice amount, the date the invoice was issued by Atradius and the due date.



Based on how your list is sorted, this can then be ordered by ascending or descending order.

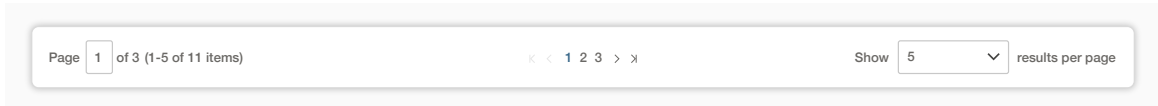


Where your filter selection results in multiple invoices, you can view these by navigating through each pagination page.



### Pagination

When viewing a list of results, Atrium will present a set of pagination options at the bottom of the page. This allows you to easily navigate between multiple pages of results, as well as influence how many items are shown on each page.



- Where there are multiple pages of results, the pagination section will show you the current page that you are on, how many pages there are in total, and the range of results shown for the current page (e.g. 1-5 out of 11 items).
- Within the centre of the pagination section, you can navigate between each page of the results, with the ability to go forward or backward a single page, or to quickly jump between the very first or very last page of the results.
- Finally, you will be able to set how many results are shown for each page. This will allow you to set this to 5, 10 or 20 items per page. You can also set how many results are shown for every listings page in Atradius Atrium under your account defaults.



Read Guide 12 - Account settings to learn more about changing your account defaults