

How to SSO to the Durell Portal

The Durell Back-Office now has Single-Sign-On to the Durell Portal – you can click through from the Back-Office to the Durell Portal as the same user without any additional login.

This guide will explain how to setup your Back-Office to SSO to your Durell Portal. It also explains how to use the SSO to e-trade in Quote Portal.

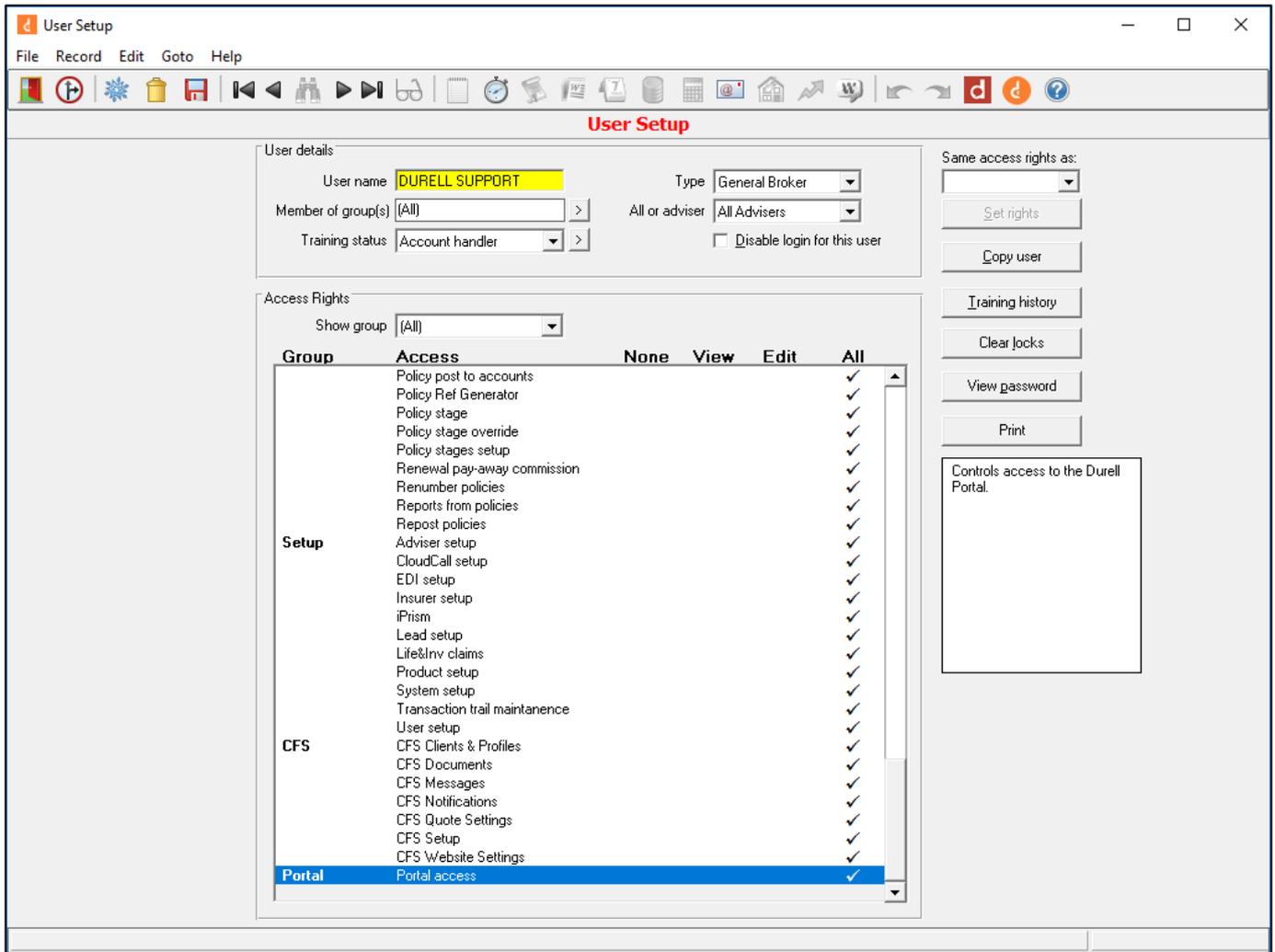
We strongly **recommend using Chrome** instead of Firefox, Safari or any other browser to use all the features listed below.

Link your Back-Office to the Durell Portal

Make sure the access right 'Portal url' under Setup -> CFS is set to <https://durell.cfsnetwork.co.uk/>. By default this will connect to the Durell Portal linked to your Back-Office licence.

User Setup

There is a new access right under Setup -> User Setup called 'Portal access' in the 'Durell Portal' section at the bottom of the list. We have not turned this on by default, i.e. you have to give your users permission to access your portal.



The 4 access levels correspond to default 'Roles' in your Durell Portal:

- **None** – no access, this is the default.
- **View** – this is very limited **AccountOnly** access, the user can only see and change their own details; this is useful when you want to grant access to a user but neither of the below options are suitable.
- **Edit** – this grants access as a standard **User**, this should be used for your advisers / execs / account handlers, it allows them to see and administer client and policy data.
- **All** – this grants access to your Durell Portal as an **Admin** user, this is very elevated access and should only be given to trusted managers or system administrators.

This permission sets the Durell user's Role so they can SSO to the Durell Portal, i.e. click the toolbar button and login with that Role.

An Admin can edit the default Roles and define additional custom Roles in the portal – see the '**How To Use Roles**' guide for more details. Once a user has been granted access to the portal an Admin can also change their Role. For example if you grant a user the AccountOnly access, you can define an appropriate custom Role in the portal and then assign that to the user.

Please note

- 1) Changing a user's Role directly in the Durell Portal will supersede the permission set in the Durell back-office. So in the example above the next time the user clicks the SSO button in Durell they will log in with their new custom Role, not the AccountOnly access initially set.
- 2) Changing the user's permission in Durell back to None and saving will **completely reset** that user's access to the Durell Portal. All their account details in Durell Portal will be reset. The next time they are granted permission in Durell they will log in with a 'blank slate'.
- 3) After a user has clicked the SSO button in Durell, their Role in the Durell Portal is set. Changing the permission in Durell between View, Edit and All will not change their Role. To change a user's Role at this point you need to change it in the Durell Portal as per 1) or reset their access as per 2).

If a user has access to the Durell Portal then the button on the toolbar with the orange Durell "d" logo will launch and log them in to your Durell Portal.



If you see a 'Channel Not Setup' web page then the url to your Durell Portal isn't set correctly, please contact our Support team to schedule a call to run through your settings.

Quote Portal Integration

As well as the **Durell Portal** button on the toolbar that launches your portal, you now have a **Quote Portal** “q” logo button that launches e-trade quoting in the **Durell Portal**.

We strongly recommend reviewing the guides **How to Use the Product Store** and **How to E-Trade in the Durell Portal (Basics)** before e-trading through the integration with your Back-Office.

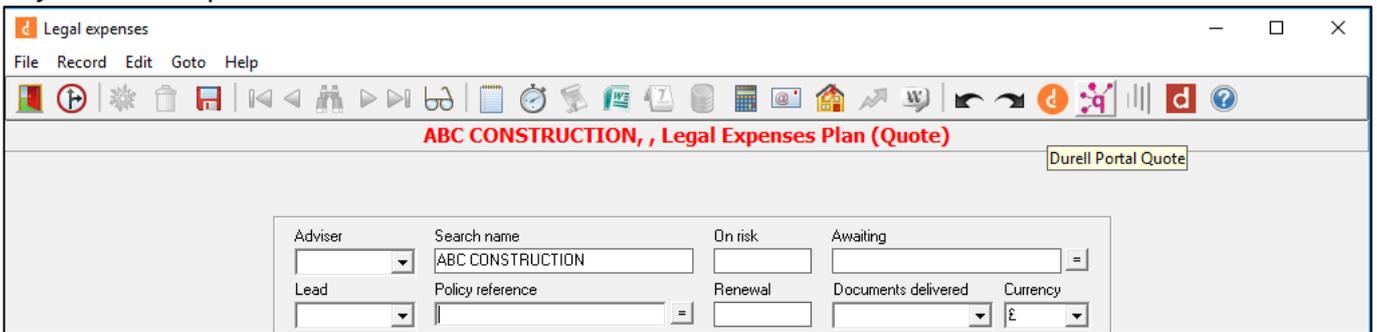
Quotes

If you have selected a quote row in the Policies screen:



Client name	Product	Insurer	Reference	Durell Portal Quote start date	End date	PD	MS
ABC CONSTRUCTION	Legal expenses						N
ABC CONSTRUCTION	Legal expenses	[No Insurer]					N

or you are in a quote:



ABC CONSTRUCTION, , Legal Expenses Plan (Quote)

Durell Portal Quote

Adviser: [dropdown] Search name: ABC CONSTRUCTION On risk: [input] Awaiting: [input] =

Lead: [dropdown] Policy reference: [input] = Renewal: [input] Documents delivered: [dropdown] Currency: £

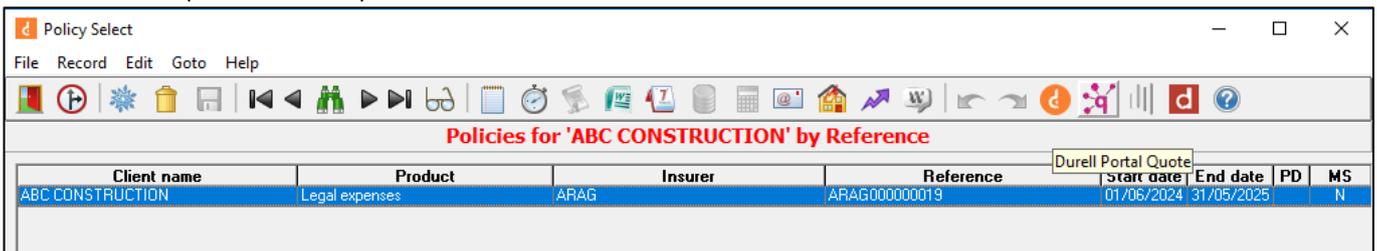
the **Quote Portal** button will be active (i.e. colourful).

If your access to the **Durell Portal** is correctly setup, clicking the **Quote Portal** button will launch the Quote Portal integration for that quote – either starting a new quote or allowing you to select from existing quotes.

Policies

Please note that policies created in Quote Portal can only be edited in Quote Portal, i.e. you can't edit details in the Back-Office.

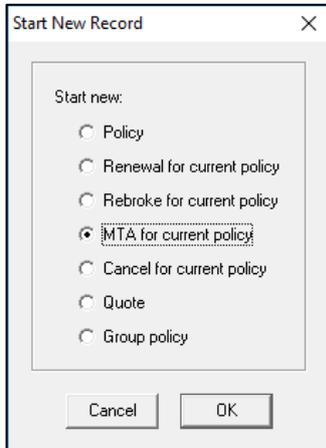
If you select a policy that was created in Quote Portal in the **Policies** screen the **Quote Portal** button will be active (i.e. colourful).



Client name	Product	Insurer	Reference	Durell Portal Quote start date	End date	PD	MS
ABC CONSTRUCTION	Legal expenses	ARAG	ARAG000000019	01/06/2024	31/05/2025		N

Clicking the **Quote Portal** button will take you to the **Durell Portal** similarly to the **Durell Portal** button.

However for Quote Portal policies, when you click the **New** button on the toolbar, the **MTA for current policy** option will launch a new MTA quote in the Quote Portal integration (or take you to an existing MTA quote if one is already underway).



For Quote Portal policies you will also see a new **Cancel for current policy** option that launches a policy cancellation preview in the Quote Portal integration.

Converting Quotes

When you convert a quote in Quote Portal it will also create a policy in your Back-Office:

- if the quote in Quote Portal is linked to a quote in your Back-Office it will convert that quote;
- if there are no linked quotes in your Back-Office it will create a new policy.

The premium details will be updated to match the quote conversion in Quote Portal – you can edit fields such as **Broker fee £** and **Finance charge £**, then post to the Accounts as normal.

Insurance documentation will also be saved down to the Back-Office against the policy record.