



## Help Guide -

## Service Provider User

V1.5

23/02/2023

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## Change History

### Version Control

Name	Position	Origo	Version	Comments	Date
			1.0	Update to screenshots and panel content to reflect 2018 Q1 release changes.	12/03/2018
Kyle Davidson	Customer Success Consultant	Customer Services	1.1	Updated Security Policy	08/11/2019
John Patterson	Client Relations Consultant	Customer Services	1.2	Changes made to 'Applications' section on page 16	30/05/2022
John Patterson	Client Relations Consultant	Customer Services	1.3	Rebranding & Updated screenshots for new UAM service release	11/10/2022
John Patterson	Client Relations Consultant	Customer Services	1.4	Updated descriptions for new UAM service	10/01/2023
John Patterson	Client Relations Consultant	Customer Services	1.5	Removal of Applications section	23/02/2023

## Table of Contents

Introduction.....	4
Audit .....	6
Maintenance.....	8
Change Log .....	9
Maintain Panels .....	10
Maintain Contact Details .....	113
Maintain Users.....	14
Applications .....	<b>Error! Bookmark not defined.</b>
Management Information.....	17
Application Verification .....	18

## Introduction

This Guide provides information on the Agency Registration for Service Provider users.

The Service has been designed to allow you to access Audit, Maintenance, Applications, Management Information and Verification pages using your Unipass certificate.

The Service has been enhanced to improve system security and to provide the ability for Service providers to create Agency Registration applications on behalf of members. Service Providers can only access the Service from an approved IP address that will have been agreed on joining the Service.

The service is accessible via the following link which will display the Service Provider home page as shown below:

<https://agencyreg.origoservices.com/serviceprovider/Login.aspx>

### Service Provider

#### Login

You must already have an identity registered with Unipass in order to use Service Provider services.  
Click on the image below to authenticate your identity with Unipass :



Log in click on the **Unipass logo** for access via your Unipass certificate.

Upon gaining access to the application you will be presented with the following menu. The options available on this page will be dependent upon user access rights set for you in the Maintenance section.

The options are:

- [Audit](#)
- [Maintenance](#)
- [Applications](#)
- [Management Information](#)
- [Verification](#)
- [Logout](#)

[Service Provider Home](#) | [Contact Us](#) | [Help](#)

## Menu

**UAM Test SP**

**Audit**

**Maintenance**

**Applications**

**Management Information**

**Verification**

Logout

## Audit

Selecting the Audit facility will display a table of agreed audit details for each application submitted to your organisation. These details are in read-only format and cannot be altered.

[Service Provider Home](#) | [Contact Us](#) | [Help](#)

### Service Provider Audit Details

#### UAM Test SP

Application Reference Number

Firm Name

Find

Find All

Application Reference Number	Adviser Firm Name	Applicant	Email Address	Date Application Submitted By Adviser Firm	Date Application Approved	Status
2598	Wildin & Co	Test Test	ttopping@unipass.co.uk	29/05/2017	29/05/2017	Approved
2658	AAA AUTOMOTIVE LTD	a	russell.mekieATorigo.com@unipass.co.uk	18/10/2017	18/10/2017	Approved
2714	Rusty's (Cycles) Limited	Test	sallystest3ATorigo.com@unipass.co.uk	17/01/2018	17/01/2018	Approved
2739	Edmans IFA Ltd	sd	sally.sinclair@origo.com	27/02/2018	27/02/2018	Approved
2740	Edmans IFA Ltd	sds	sally.sinclair@origo.com	27/02/2018	27/02/2018	Approved
2779	Edinburgh Bicycle Co-operative Ltd	Firm Director	toby.briggs@aigliffe.co.uk	25/06/2018	10/07/2018	Approved
2785	Edinburgh Bicycle Co-operative Ltd	Toby Briggs	toby.briggs@aigliffe.co.uk	09/07/2018	10/07/2018	Approved
2786	Edinburgh Bicycle Co-operative Ltd	Toby Briggs	toby.briggs@aigliffe.co.uk	18/07/2018	18/07/2018	Approved
2787	Edinburgh Bicycle Co-operative Ltd	Toby Briggs	toby.briggs@aigliffe.co.uk	18/07/2018	18/07/2018	Approved
2793	Edinburgh Bicycle Co-operative Ltd	Toby Briggs	toby.briggs@aigliffe.co.uk	30/07/2018	10/07/2018	Approved

Previous 1 2 3 4 5 6 Next

Showing 1 - 10 of 57

Back

The details will be displayed in Application Reference Number sequence but by clicking in the heading field of any column within the table the table will be sorted by that column's values. Clicking on the same column again will re-display the information in reverse sequence.

Double clicking on any line will display details of the application and the Product Provider(s) to whom the application has been submitted.

[Service Provider Home](#) | [Contact Us](#) | [Help](#)

## Service Provider Audit Details

### UAM Test SP

Application Reference Number	<input type="text" value="2598"/>
Adviser Firm Name	<input type="text" value="Wildin &amp; Co"/>
Applicant	<input type="text" value="Test Test"/>
Email Address	<input type="text" value="ttopping@unipass.co.uk"/>
Date Application Submitted By Adviser Firm	<input type="text" value="29/05/2017"/>
Date Application Approved Or Rejected	<input type="text" value="29/05/2017"/>
Status	<input type="text" value="Approved"/>
Providers Application Submitted To	<div>AA UAT Test Product Provider 1 AA UAT Test Product Provider 2</div>

[Back](#)

## Maintenance

Clicking on **Maintenance** in the menu will reveal the sub menu options as below:

- [Change Log](#)
- [Maintain Panels](#)
- [Maintain Contact Details](#)
- [Maintain Users](#)

[Service Provider Home](#) | [Contact Us](#) | [Help](#)

### Menu

UAM Test SP

### Audit

### Maintenance

- **Change Log**
- **Maintain Panels**
- **Maintain Contact Details**
- **Maintain Users**

### Applications

### Management Information

### Verification

Logout



## Change Log

The **Change Log** provides read-only access to the log of all changes made to the User details (Maintenance, Audit, Submitted Applications or MI). By default, only the current day's changes will be displayed with a facility provided to search for previous day's changes.

[Service Provider Home](#) | [Contact Us](#) | [Help](#)

### Service Provider Change Log

#### UAM Test SP

From Date

Updated By (User's email address)

What Was Updated

Action Date	Updated By	Action	What Was Updated	Original Value / Action	Current Value / Rejection Reason / User Updated
02/10/2022 17:07	Testemail13@unipass.co.uk	Update	Application Ref 3399	Approved	
07/10/2022 15:52	clientskywalker@outlook.com	Delete	Applications	clientskywalker@outlook.com	
07/10/2022 15:54	clientskywalker@outlook.com	Insert	Applications		225176
10/10/2022 07:33	Testemail13@unipass.co.uk	Update	Application Ref 3420	Approved	
10/10/2022 07:40	Testemail13@unipass.co.uk	Update	Application Ref 3421	Rejected	Checking to see if the rejection error is displayed
11/10/2022 09:39	Testemail13@unipass.co.uk	Update	Application Ref 3429	Approved	
11/10/2022 11:24	Testemail13@unipass.co.uk	Update	Application Ref 3432	Approved	
11/10/2022 14:19	Testemail13@unipass.co.uk	Update	Application Ref 3434	Approved	

Showing 1 - 8 of 8

## Maintain Panels

The Service Provider Panel Details page provides access to the panel information for your organisation which is used within the Agency Registration system.

While you have access to the panel details, should you require these to be updated, please contact the Agency Registration Helpdesk who will initiate the change. Contact details for the Helpdesk can be found in the **Contact Us** facility in the top right corner of the webpage.

### How to Maintain your Panels

After clicking on 'Maintain Panels' from the 'Maintenance' section of the home page menu, the table of your panels which appear on the Origo Agency registration form will appear.

(N.B. If you are registered for the Origo Agency Administration Service then please remember to update your panels on this service also. Log on to the Agency Administration page > Profile > Maintain > Panels Provided > +Add)

[Service Provider Home](#) | [Contact Us](#) | [Help](#)

### Service Provider Maintain Panel Details

#### UAM Test SP

Panel Name	Mandatory	Must Select One	Is Active
Add as inactive	Yes	Yes	Yes
Panel 1	No	Yes	Yes
NNYhelp	No	Yes	Yes
YYN	No	Yes	No
Panel 2	No	Yes	No
NNN	No	Yes	No
YNYHelp	Yes	Yes	No
NYN	No	Yes	No

[Back](#)

[Add Panel](#)

To add a new panel, click on add panel beneath the table. (If you wish to edit a panel, please double click on the panel to bring up its details to be edited).

## Service Provider Add Panel

### UAM Test SP

Panel name:

Panel order:

Mandatory: \* ☐ No ☐ Yes

Must Select One: \* ☐ No ☐ Yes

Active: \* ☐ No ☐ Yes

[Back](#)

[Add](#)



The fields which you will now be required to fill in are:

**Panel Name** – What you wish your panel to be called,

**Panel Order** – Where in *numerical* order of the panel list do you wish your new panel to appear,

**Mandatory** – If you wish your panel to be automatically selected by an applicant,

**Must Select One** – If you have more than one panel & wish to group them, one of the group of panels must be selected 'Yes' for the panel combination to be valid. If you are **not** grouping your panels then the default for all panels **MUST** be 'Yes',

**Active** – If you wish to make your panel active for an applicant to select. Please be aware that a panel cannot be deleted, it can only be deactivated.

Once the fields have been completed click save at the bottom of the page.

[Service Provider Home](#) | [Contact Us](#) | [Help](#)

## Service Provider Add Panel

### UAM Test SP

Panel name:	<input type="text" value="NYY"/>
Panel order:	<input type="text" value="10"/>
Mandatory: *	<input checked="" type="radio"/> No <input type="radio"/> Yes
Must Select One: *	<input type="radio"/> No <input checked="" type="radio"/> Yes
Active: *	<input checked="" type="radio"/> No <input type="radio"/> Yes

[Back](#)

[Add](#)

Your new panel will now appear on the list on the and be available for selection by any new applicant.

## Maintain Contact Details

Service, Technical, Application Enquiry and Web contact details can be added / edited here.

[Service Provider Home](#) | [Contact Us](#) | [Help](#)

### Service Provider Maintenance Details

#### UAM Test SP

\* Indicates Mandatory Information

Contact Name *	<input type="text" value="Service Provider User One"/>
Contact Telephone Number *	<input type="text" value="01314511186"/>
Contact Email Address *	<input type="text" value="Testemail13@unipass.co.uk"/>
Technical Contact Name *	<input type="text" value="Service Provider User One"/>
Technical Contact Telephone Number *	<input type="text" value="01314511186"/>
Technical Contact Email Address *	<input type="text" value="Testemail13@unipass.co.uk"/>
Main Site Url *	<input type="text" value="http://www.unipass.co.uk/"/>
Email Address Verification Requests Are Sent To *	<input type="text" value="Testemail13@unipass.co.uk"/>

[Back](#)

[Save](#)

## Maintain Users

Options are provided on this page to allow you to maintain details for users.

[Service Provider Home](#) | [Contact Us](#) | [Help](#)

### Maintain Users

#### UAM Test SP

Criteria: \* ☐ Deleted

Search


#### Users

Add User

Email Address
clientskywalker@outlook.com
Jennifer.mackinnon@origoservices.com
john.patterson@origo.com
Testemail13@unipass.co.uk
Showing 1 - 4 of 4

Back

By double clicking on the email address in the list, the page below opens, and you can decide which users can access the Applications, Audit, Maintenance, MI and Verification functions.

 **ORIGO**  
Agency Registration

Service Provider Home | Contact Us | Help

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**Edit User**

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**SimplyBiz**

\* Indicates Mandatory Information

E-mail address: \*

Accessible sections: \*

- ☒ Applications
- ☒ Audit
- ☒ Maintenance
- ☒ MI
- ☒ Verification

 **ORIGO**

## Management Information

If you log into the Management Information facility the page below will be displayed showing a table of agreed totals for the current year (Monthly and Year to Date) of all applications submitted to the Agency Registration system and those applications which were selected for submission to your organisation.

[Service Provider Home](#) | [Contact Us](#) | [Help](#)

### Service Provider Management Information

#### UAM Test SP

#### Management Information for Year 2022

Month Beginning	Applications Verified	Applications Rejected	Applications Verified By You	Applications Rejected By You
YEAR TOTAL	0	0	0	0

Previous Year

Next Year

Back

Print



The details will be displayed in Month Beginning sequence (Jan to Dec) but by clicking in the heading field of any column within the table the table will be sorted by that column value. Clicking on the same column again will re-display the information in reverse sequence.

Double clicking on a row will display details of the Product Provider(s) to whom the applications you approved have been submitted during the selected period.

The print button allows you to print a more user-friendly print out without the screen controls being present on the printed output.



## Application Verification

If you log into the Application Verification facility the page below will be displayed showing a table listing each application submitted to your organisation for verification.

The details will be displayed in Application Reference Number sequence but by clicking in the heading field of any column within the table will sort by that column value. Clicking on the same column again will re-display the information in reverse sequence.

### Service Provider Verification

#### UAM Test SP

Application Reference Number	Adviser Firm Name	Date Application Submitted by Adviser Firm
2656	AAA AUTOMOTIVE LTD	18/10/2017
2685	Ellis Bates Wealth Management Limited	20/12/2017
2733	Edmans IFA Ltd	27/02/2018
2734	Edmans IFA Ltd	27/02/2018



[Back](#)



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Agency Management

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