

**CLIENT AREA**

USER MANUAL



This **User Manual** for the **Grupo Insur Client Area** has been prepared to guide our clients in properly accessing and using the platform designed for **managing and submitting the documentation required for anti-money laundering and counter-terrorist financing (AML/CFT) purposes.**

Through this platform, our clients can provide all the information necessary to comply with current legal obligations in a simple, secure, and centralized manner. This manual explains, step by step, how to access the Client Area, navigate its sections, upload the requested documentation, and monitor the status of the verification process.

Our commitment is to provide a clear, intuitive, and secure environment, facilitating regulatory compliance while ensuring the confidentiality of all data submitted.

## **1. Registration in the Client Area**

Once the client accesses the portal, they will find the **“Register”** tab, where their invitation code will already be redeemed, and the **Email and Username fields will be pre-filled.**

To complete the registration process, the user must:

- 1. Set a password.**
2. Click the **“Register”** button, as shown in the image below.

→ Iniciar sesión | Registrarse | Canjear invitación

Código de canje: 50708dba-911d-436b-a783-c79365870b39

Registrarse para una nueva cuenta local

\* Correo electrónico   
\* Nombre de usuario   
\* Contraseña   
\* Confirmar contraseña

Wjd4HCw

Generar nueva imagen

Reproducir el código de audio

Escriba el código de la imagen

Registrarse

**Responsable de tratamiento:** INSUR PROMOCIÓN INTEGRAL, S.L.U., (B91416438). **Finalidad:** gestionar su acceso al portal y el intercambio seguro de documentación necesaria para la relación contractual y el cumplimiento de obligaciones legales. **Ejercicio de derechos:** puede revocar los consentimientos y ejercer sus derechos en: [dpo@grupoinsur.com](mailto:dpo@grupoinsur.com). **Información Adicional:** Política Privacidad.

This registration process is only required the **first time** the client accesses the portal. Once their account has been created, they can log in directly via the **“Log in”** tab.

→ Iniciar sesión | Registrarse | Canjear invitación

Iniciar sesión con una cuenta local

\* Nombre de usuario   
\* Contraseña

¿Recordarme?

Iniciar sesión

¿Ha olvidado la contraseña?

Upon logging in, the system will send a **verification code** to the provided email address. The client must enter this code on the

corresponding screen to complete the authentication process and securely access the portal.

Escriba el código de seguridad

Código

Compruebe si ha recibido el código de seguridad por correo electrónico.

Comprobar

## 2. Profile settings

Once the registration process is complete, the **Profile** section will open. On this screen, the client can view:

- Their **name**, displayed in the upper-right corner.
- Their **contact details**, shown in an editable form.

If desired, the client can **update their email address and mobile phone number**. To save any changes, they must click the **“Update”** button.

The Profile screen will appear similar to the one shown in the image below.

Grupo Insur > Perfil



En caso de ser necesario, puede modificar aquí sus datos de contacto.

### Su información

Perfil

Seguridad

- Cambiar contraseña
- Cambiar correo electrónico

Nombre \*

Apellidos \*

Correo electrónico \*

Teléfono móvil \*

Idioma preferido \*

Inglés

Actualizar

### 3. Uploading documentation

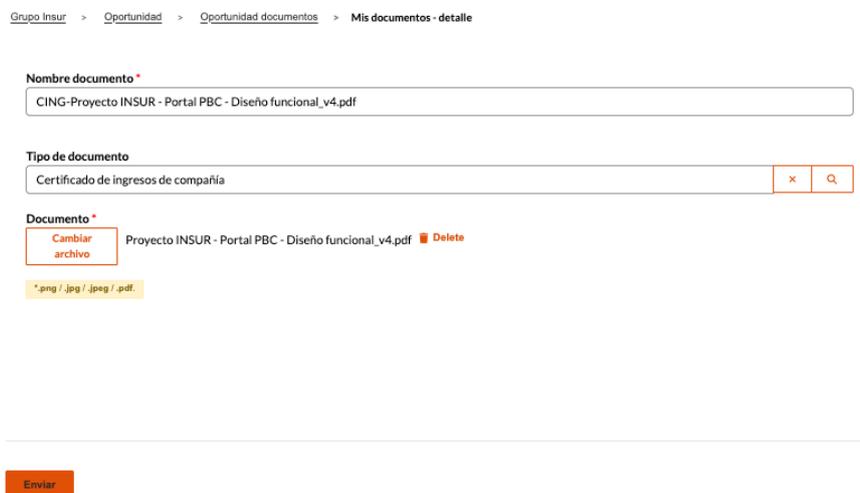
When accessing the “**Documentation**” section, the client will see their purchased property. By clicking on it, they can access the page designated for uploading the required documentation.

Grupo Insur > Oportunidad

| Contacto       | Promoción                     | Código Unidad de Venta |                  |
|----------------|-------------------------------|------------------------|------------------|
| [User Profile] | PINEDA PARQUE 3 FASE BLOQUE 5 | VIV-00-06-00-002-A     | [Dropdown Arrow] |

To upload a document, the client must follow these steps:

1. **Click the “Upload Documentation” button** to open the upload form.
2. In the form, select the appropriate **Document Type**.
3. Click **“Choose File”** and select the document to attach from their device.
  - Allowed file types: **PNG, JPG, JPEG, and PDF.**
  - Once the file is selected, the **“Document Name”** field will be automatically populated with a prefix indicating the document type, followed by the uploaded file name (this field is read-only).
4. Click **“Submit”** to save the uploaded document.



Grupo Insur > Oportunidad > Oportunidad documentos > Mis documentos - detalle

Nombre documento \*

CING-Proyecto INSUR - Portal PBC - Diseño funcional\_v4.pdf

Tipo de documento

Certificado de ingresos de compañía

Documento \*

Cambiar archivo Proyecto INSUR - Portal PBC - Diseño funcional\_v4.pdf Delete

\*.png / .jpg / .jpeg / .pdf.

Enviar

After confirming the submission, the client will return to the main **Documentation** screen, where they can view the newly uploaded file and its **creation date**, as shown in the image below.

| Nombre   | Documento | Unidad Venta       | Validado | Razón para el estado | Fecha Creado    | Fecha Validado  |                                  |
|--|-----------|--------------------|----------|----------------------|-----------------|-----------------|----------------------------------|
| <a href="#">SIN NOMBRE</a>   |           | VIV-00-07-00-002-B | No       | Activo               | 09/07/2025 9:45 |                 | <input type="button" value="v"/> |
| <a href="#">DREP - Proyecto INSUR - Portal PBC - Diseño funcional_v4.pdf</a> |           | VIV-00-07-00-002-B | Sí       | Activo               | 09/07/2025 9:13 | 09/07/2025 9:19 | <input type="button" value="v"/> |

The system allows downloading any of the uploaded documents by clicking **the icon located in the “Document” column**.  
 Once the client has uploaded **all the required documentation**, they must click the **“Submit for Validation”** button.

| Nombre   | Documento | Unidad Venta       | Validado | Razón para el estado | Fecha Creado     | Fecha Validado  |                                  |
|--|-----------|--------------------|----------|----------------------|------------------|-----------------|----------------------------------|
| <a href="#">SIN NOMBRE</a>   |           | VIV-00-07-00-002-B | No       | Activo               | 09/07/2025 9:45  |                 | <input type="button" value="v"/> |
| <a href="#">DREP - Proyecto INSUR - Portal PBC - Diseño funcional_v4.pdf</a> |           | VIV-00-07-00-002-B | Sí       | Activo               | 09/07/2025 9:13  | 09/07/2025 9:19 | <input type="button" value="v"/> |
| <a href="#">Nombre Documento</a>   |           | VIV-00-07-00-002-B | No       | Activo               | 09/07/2025 12:58 |                 | <input type="button" value="v"/> |

This action will send an **email notification to the sales administrator responsible for the operation**. Once the submission is completed, a message will appear indicating that the documents have been successfully sent for validation.

After the Grupo Insur **sales administrator** reviews the submitted documentation, they will proceed with its validation. If everything is correct, **“Yes”** will appear in the **“Validated”** column, indicating that the document has been accepted.

If any issues prevent the validation of the documentation (for example, incomplete information, illegible files, or incorrect documents), **the Grupo Insur sales administrator assigned to the operation will contact the client** to inform them of the issue and request the necessary correction.