

NBS Ireland Renewals via PandaDoc – How To Guide

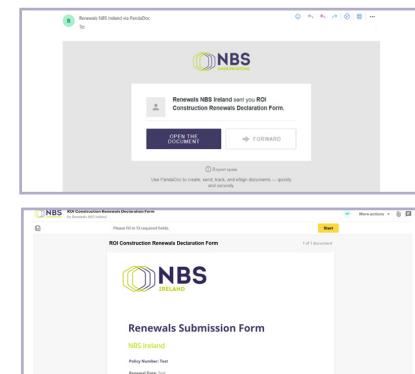


Introduction

NBS Ireland renewal forms are sent via PandaDoc to make the renewals process quick and easy to complete. This guide explains how to open the document, complete the required fields, add your signature, submit the form, and (if needed) forward the document to the insured.

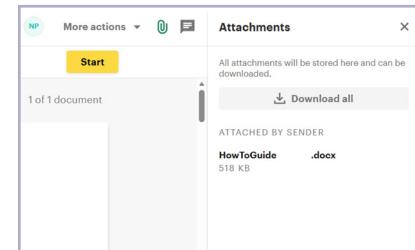
Step 1: Open the PandaDoc email

1. You will receive an email from PandaDoc with the sender displayed as: **Renewals NBS Ireland via PandaDoc**.
2. Select **Open the document**.
3. The document will open as a webpage and can be accessed on **laptop, desktop, tablet, or smartphone**.



Step 2: Access this how to guide

1. Once you are in the PandaDoc, select the paperclip icon in the top-right corner.
2. You can then download the How To Guide to help you complete the form.



Step 3: Complete the form fields

1. Click inside each box and enter the relevant information.

Required fields

- Boxes shaded red are **required**.
- When you hover over a required box, a pop-up will appear showing "**Required**."
- If a required field is not completed, the form will not allow you to select **finish**.

Optional fields

White boxes are optional — however, please provide as much detail as possible.

Step 4: Draft saving (automatic)

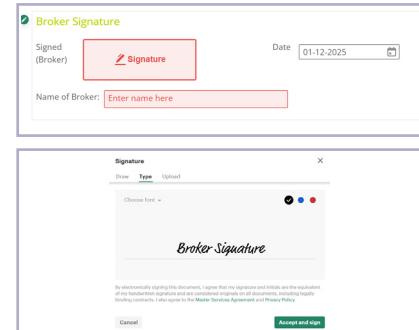
Any information you enter will be stored automatically as a **draft**.

If you leave the webpage and return later, the information you have entered will still be there.

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Step 5: Add your signature

1. When signing the document, select the signature box.
2. A pop-up will appear and you can choose to:
 - edit the signature text,
 - draw your signature, or
 - upload a signature, depending on your preference.



Step 6: Submit the document

1. Once all required fields have been completed, the **finish** button will be available.
2. Please ensure you review all information carefully before submitting.
3. Select **finish** to submit the form.

What happens next

- You will be redirected to the **NBS Ireland webpage**.
- **A PDF copy of the completed document** will be emailed to you.
- You do not need to do anything else — NBS Ireland will automatically receive a copy of the completed form and it will be added to the system.

Forwarding the document for the insured to complete

If you need to forward the document for the insured to complete:

1. Select the forward option in your email.
2. A webpage will open with a pop-up.
3. To enable the insured to fill out the form, you must tick the box at the top. If you do not tick this box, the insured will only be able to view the document.

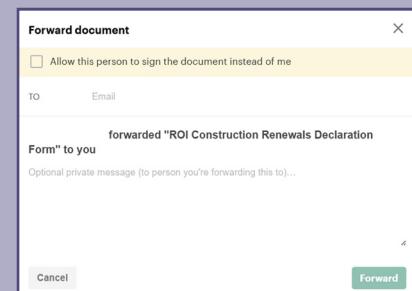


Please Note

Forwarding the document with the right to sign means:

- any previously filled out information will be **cleared**, and
- your access will change to **view-only**, as the document can only be completed by one person.

Once completed, both the **broker (original recipient)** and the **insured (the forwarded recipient)** will receive a **PDF copy** of the completed form.



Need help?

If you experience any problems completing the form, please contact the NBS Ireland team on **1800 856 090**.