

A guide to Envoy's auto-instruct service.

Have your annuities automatically instructed for you. Simple.

Envoy's auto-instruct service is an easy and convenient way to ensure that your intellectual property remains in force.

There's no need for you place any instructions - Envoy automatically instructs your saved annuities and renewals for you.



How it works

On the 12th day of every month we will process all annuities and renewals due in the following month, provided the cases are saved in the Saved Quotes (or Pending) area of your account.

For example: On the 12th January, all cases saved to your account due to be renewed in February will be automatically instructed. Once instructed, Envoy will process the annuity or renewal on your behalf.

Note, however, that an annuity or renewal will not be auto-instructed in two circumstances, namely:

1. Cases added to your account either **on or after** the 12th day of the month, which have a due date in the past, in the current month or even in the following month, **will not be captured** by auto-instruct.

For example: a new case added on the 16th of January with a due date on or before the last day of February will not be auto-instructed.

2. If your account is set up with a Deposit Account and there are insufficient funds in the account to cover the full cost of all the auto-instructed cases, the auto-instruct function will fail. Our system will check the balance of your account on the 5th day of the month and will email you an alert if it appears that your account has insufficient funds for auto-instruct to run the following week.

Any case that is not auto-instructed can still be manually instructed at any time.

The auto-instruct service applies to all cases saved within your Saved Quotes. It is not possible to apply the auto-instruct setting to only some cases. If there are any cases in your Saved Quotes that you do not want to be automatically instructed, these should be removed before the 12th day of the month.

If a case is instructed automatically, and you or your client do not wish the case to be renewed, remember that instructions may be cancelled by clicking 'Cancel' in the Instructed tab. Provided that the annuity has not been paid and renewed, we will issue a credit note for the cancelled instruction.

Auto-instruct makes life easier

- ✓ **Auto-instruct removes the need to log into your account and manually instruct cases, saving you time and reducing the potential for missing deadlines - the system takes care of this for you.**

We recommend auto instruct for corporations and universities who know which cases are to be maintained in the future.

Auto-instruct is less suitable for law firms who typically may receive late instructions from their clients.

If you have any further questions about Envoy and our auto-instruct service, please contact:

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