



AR Portal User Guide

Renewing a Policy

Introduction

The purpose of this document is to outline the processes and guidance for the Appointed Representative Portal

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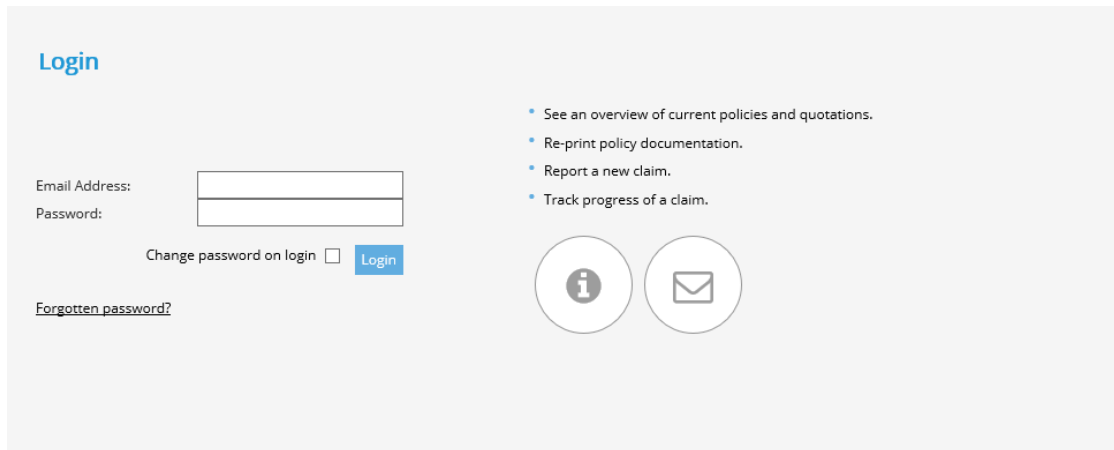
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Logging In

The following link enables you to access the login screen

<https://portal.compassinsuranceservices.co.uk/Extranet/>

This will bring up the following screen



The screenshot shows a login interface with the following elements:

- Header:** "Login" in blue text.
- Form Fields:** "Email Address:" and "Password:" labels followed by two input boxes.
- Buttons:** A checkbox labeled "Change password on login" and a blue "Login" button.
- Links:** A link labeled "Forgotten password?".
- List of Features:**
 - See an overview of current policies and quotations.
 - Re-print policy documentation.
 - Report a new claim.
 - Track progress of a claim.
- Icons:** Two circular icons: one with an 'i' (information) and one with an envelope (email).

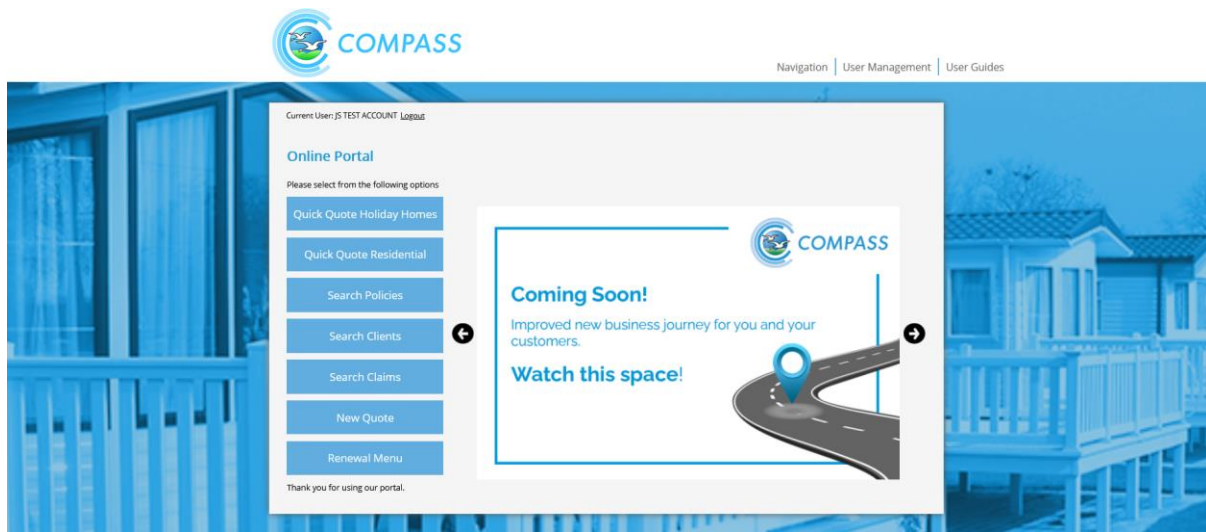
You will be issued with

- Username
- Password

Enter these into the fields shown and click **Logon**

Basic Navigation

The home screen of the portal is as follows



From this screen there are quick links to

- Quick Quote Holiday
- Quick Quote Residential
- Search Policies
- Search Clients
- Search Claims
- New Quote
- Renewal Menu

At the bottom of the screen there are also links to Compass information and websites for the user to follow.

The Navigation drop down also allows the user to access various parts of the Portal from any screen in the portal.

The portal does not allow use of the **Back** button on the users browser and navigation through the screens should only be done using the navigation built into the portal itself



Oops!

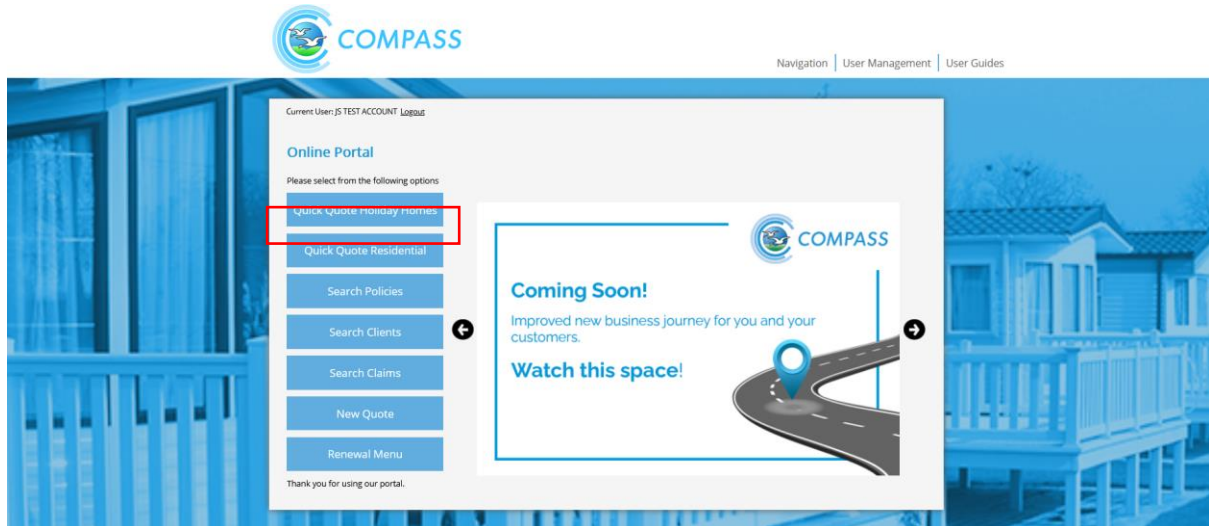
Please do not use browser navigation buttons. Please use the navigation buttons that this application provides.

Okay

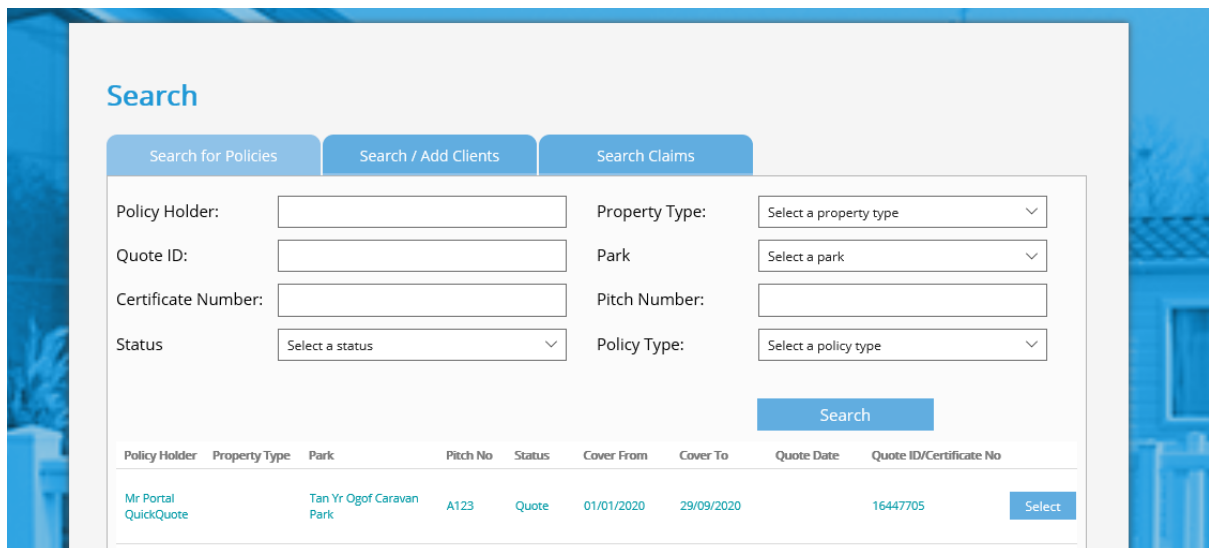
Inviting a Renewal

To invite a policy for renewal you first need to search and find the client or policy using the Search functionality

If you select “Search for Policies” from the main screen you will be presented with the following screen. Here there are a list of all your policies along with the options to search by certain criteria. Policy Holder or Pitch Number are the most accurate searches



This will bring up the Policy Search screen, initially showing all Quotes and Policies. You can filter the search using the options at the top of the screen.



Clicking select next to a quote record on this page will take the user into the quote details for that record where they can view/change quote details

Holiday Caravan/ Lodge Insurance - xx xxxx

Holiday Caravan/ Lodge Insurance
Quote No: 24581605
Client ID: CMPC302684
Cert No: CMPCHH191597914

Cover Start Date

Start Date? *

Client Details

Client

Correspondence Address

Joint Policy Holder(s)?

Holiday Caravan/ Lodge Details

Park Name? *

Structure Type? *

Cover Required? *

Pitch Number?

Year of manufacture? *

Make?

Once you are happy that the quote details are correct, they can proceed to generate a premium/documents by ticking the quote declaration box and pressing Finish.

Confirm Quote Declaration

I/we declare that the statements and particulars given in this proposal are, to the best of my/our knowledge and belief, true and complete, that the sums insured will be maintained on a true and up to date basis and that this proposal shall form the basis of the contract between me/us and Binnacle Insurance Services Limited.

Please note that fields marked with an * are mandatory.

This will proceed to the Quote Summary screen. On this screen the user can see the Premium and a brief summary of the policy.

Quote Summary - Holiday Caravan/ Lodge Insurance - xx xxxx

Quote Details

Cover From 01 November 2021
Cover To 31 October 2022

Total Premium **Premium Breakdown**
£173.60 £155.00 + £18.60

The premium above is the amount payable for cover from the Cover From and Cover To dates, and includes administration fees and applicable duties/levies/taxes where applicable.

If your cover period is less than a full year this will be a pro rata amount of your annual premium. A full breakdown is provided on your documentation.

Breakdown of Cover

Park Name	Home Address	CCY	Total Sum Insured	Total Premium
Sunnyvale Holiday Park	8 Railway Terrace, Maesteg, CF34 0UE	GBP	20,000	173.60

This quotation is valid for 30 days

Your quotation has been based on the information provided. If this is accepted the contract of insurance will incorporate all the terms of the Underwriters standard policy wording including its conditions, exclusions and

Holiday Caravan/ Lodge Insurance

Quote No: 24581605

Proposer: xx xxxx

Country:

Currency: £

Quote Date:

Email/ Print Documents

Edit Quote

Policy Summary

Refer to UW

Proceed to Cover

This is the summary of your quote and it shows the following information

- Cover From
- Cover To (this will be the common renewal date)
- Total Premium (with a breakdown including and excluding IPT)
- Total Sum Insured

There are also quick link boxes for a number of actions

Email/ Print Documents

Edit Quote

Policy Summary

Refer to UW

Proceed to Cover

Email/ Print Documents – Generates the quote documents and sends you a copy of them via email, if you have inputted a customer email address, a copy will be sent to the customer.

Edit Quote – Takes you back into the quote and allows you to edit the information and generate a revised quote

Policy Summary – Takes you back to the overview of the client/ policy

Refer to UW – Enables you to send a message to the Compass teams

Proceed to Cover – Allows you bind cover for the quote

Issuing the Quote

To issue the Quote to the client select 'Email/ Print Documents'. This will send an email automatically and also generates the documents if you need to print (this can take up to 60 seconds depending on the speed of your network) You might also need to refresh the web page (F5)

Quote Email Confirmation

Your Quote

Product Name: **Holiday Homes**
Quote Reference: **898285**
Status: **Quote**

The following documents have been created for this policy. You will receive an email with these documents. You can also reprint these documents below if you wish.

Description	Created	View
Product Information	08/07/2019 10:39:45	View
Schedule	08/07/2019 10:39:44	View
About Us	08/07/2019 10:39:44	View
Quotation	08/07/2019 10:39:39	View

Holiday Homes

Record ID: 898285
Client ID: CMP005015
Cert No: N/A

Proposer: Mr Caravan Owner
Country: United Kingdom
Currency: £

[Quote Summary](#)
[Policy Menu](#)

From here you can access the documents to print or issue them to your client.

Editing the Quote

You can edit a quote by selecting the Edit Quote option on the quote screen

Quote Summary - Holiday Caravan/ Lodge Insurance - Mr James Stout

Quote Details

Cover From 24 August 2021
Cover To 31 May 2022

Total Premium £356.97
Premium Breakdown £318.72 + £38.25 IPT

The premium above is the amount payable for cover from the Cover From and Cover To dates, and includes administration fees and applicable duties/levies/taxes where applicable.

If your cover period is less than a full year this will be a pro rata amount of your annual premium. A full breakdown is provided on your documentation.

Breakdown of Cover

Park Name	Home Address	CCY	Total Sum Insured	Total Premium
	10 Yetis P R Ltd, 9 Pullman Court, Great Western Road, Gloucester, Gloucestershire, G L1 3ND	GBP	46,000	356.97

This quotation is valid for 30 days

Your quotation has been based on the information provided. If this is accepted the contract of insurance will incorporate all the terms of the Underwriters standard policy wording including its conditions, exclusions and warranties.

Holiday Caravan/ Lodge Insurance
Quote No: 24556805

Proposer: Mr James Stout
Country: United Kingdom
Currency: £
Quote Date: 24 August 2021 10:16

Email/ Print Documents
Edit Quote
Policy Summary
Refer to UW

Proceed to Cover

This will bring up the following screen where you can amend and update the quote

Holiday Caravan/ Lodge Insurance - Mr James Stout

Holiday Caravan/ Lodge Insurance

Quote No: 24556805
Client ID: CMPCB13555
Cert No: N/A

Cover Start Date

Start Date? *

Client Details

Client Mr James Stout
Correspondence Address 10 Yetis P R Ltd, 9 Pullman Court, Great Western Road, Gloucester, Gloucestershire, GL1 3ND, United Kingdom
Email address James.Stout@compass.co.uk
Correspondence by Email?
Joint Policy Holder(s)?

Holiday Caravan/ Lodge Details

Park Name? *

Cover Required? *

Pitch Number?

Year of manufacture? *

Make?

Model?

Fitted with floatation device? Yes No

Included as part of sale? Yes No

Width (ft)

Length (ft)

Serial Number

Number of bedroom(s)?

Proceed to Cover

If the client wants to proceed straight to cover then select 'Proceed to Cover'

Incept Cover - Holiday Homes - Mr Caravan Owner

Premium Quotation

Premium	£339.33
Tax	£40.72
Commission	£84.83

Holiday Homes

Record ID:	898265
Client ID:	CMPC005015
Proposer:	Mr Caravan Owner
Country:	United Kingdom
Currency:	£

The proposal/statement of fact, together with any other information supplied to the Insurer, must not be misleading or incomplete and shall form the basis of the contract with the Insurer and shall be incorporated therein.

If you are aware (having made all due enquiries) of any information not specifically requested in the proposal/statement of fact but which would have a material bearing upon the Insurers' decision on whether or not to provide cover to the Insured or the terms upon which such cover would be provided, you must notify the Insurer of it before the contract of insurance is concluded and obtain their specific confirmation that they are willing to proceed.

The certificate terms, conditions, exclusions and warranties which will apply to this quotation and the insurance cover to which it relates will be as per the quotation document and the certificate wording. The certificate wording can be accessed by clicking the button above.

Cover Period

Cover From	14 July 2019
Cover To	30 May 2020

Agree to terms

Back **Purchase**

You must tick the Agree to Terms box and then select 'Purchase'

Policy OnRisk Confirmation

Your Policy

Product Name:	Holiday Homes
Certificate Number:	CMPCHH19898265
Status:	OnRisk

Holiday Homes

Record ID:	898265
Client ID:	CMPC005015
Cert No:	CMPCHH19898265
Proposer:	Mr Caravan Owner
Country:	United Kingdom
Currency:	£

Your policy is now OnRisk and a confirmation email has been sent to: CMPA000100@precisionuat.co.uk

Annual Premium	Premium Breakdown
£380.05	£339.33 + £40.72 IPT

The annual premium is the amount which includes administration fees and applicable duties / levies / taxes where applicable. Note a full breakdown is provided on the policy documentation.

Documents are currently being generated. Please hit the refresh button on your browser until document grid is presented below.

Policy Menu

The policy is now showing as 'On Risk' and the screen now gives the following information

- Product
- Policy No. – this is the policy reference
- Client ID – this is the reference for this specific client
- Cert No. – Unique insurer reference

If you want to send / print documents then select 'Policy Menu'.

Policy Menu - Holiday Homes - Mr Caravan Owner

Proposer: Mr Caravan Owner **Policy Status:** OnRisk
Cover From: 14 July 2019 **Cover To:** 30 May 2020
Agent: Foxhouses Park Ltd **Commission:** £84.83
Correspondence Address: 42 Malham Drive, HARROGATE, North Yorkshire, HG3 2YR, United Kingdom

Year	Status	Sub Status	Quote Date	Cover From	Cover To	Total Premium	Tax/Levy/Duty	Select
2019	OnRisk		08 July 2019	14 July 2019	30 May 2020	£380.05	£40.72	

Holiday Homes
Record ID: 898265
Client ID: CMPC005015
Cert No: CMPCHH19898265
Proposer: Mr Caravan Owner
Country: United Kingdom
Currency: £

Client Details
Documents
Claims
Exit

From here you can then select 'Documents' and the following screen will appear showing the documents for this Policy

Document Summary - Holiday Homes - Mr Caravan Owner

Proposer: Mr Caravan Owner **Policy Status:** OnRisk
Cover From: 14/07/2019 **Cover To:** 30/05/2020
Agent: Foxhouses Park Ltd **Commission:** £84.83
Correspondence Address: 42 Malham Drive, HARROGATE, North Yorkshire, HG3 2YR, United Kingdom

Description	Created	Created By	View Document
Product Information	08/07/2019 10:32:46	CMPA000100	View
Policy Wording	08/07/2019 10:32:45	CMPA000100	View
Schedule	08/07/2019 10:32:43	CMPA000100	View
Confirm Letter	08/07/2019 10:32:35	CMPA000100	View

Holiday Homes
Record ID: 898265
Client ID: CMPC005015
Cert No: CMPCHH19898265
Proposer: Mr Caravan Owner
Country: United Kingdom
Currency: £

[Policy Menu](#)
[Upload Document](#)

You can view then then save or print these documents