



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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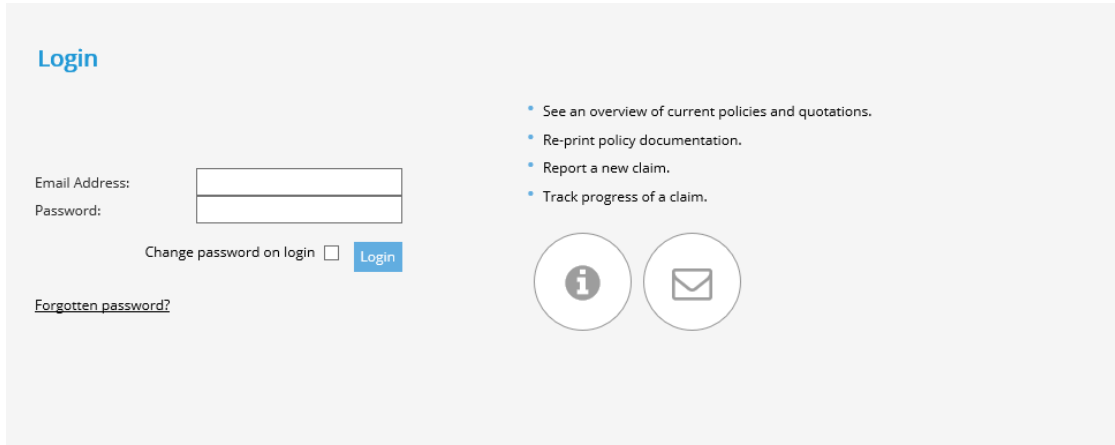
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Logging In

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 title "Login" in blue. On the left, there are two input fields: "Email Address:" and "Password:". Below the password field is a checkbox labeled "Change password on login" and a blue "Login" button. A link for "Forgotten password?" is located below the password field. On the right, there is a list of services: "See an overview of current policies and quotations.", "Re-print policy documentation.", "Report a new claim.", and "Track progress of a claim.". At the bottom right, there are two circular icons: one with an 'i' for information and one with an envelope for email.

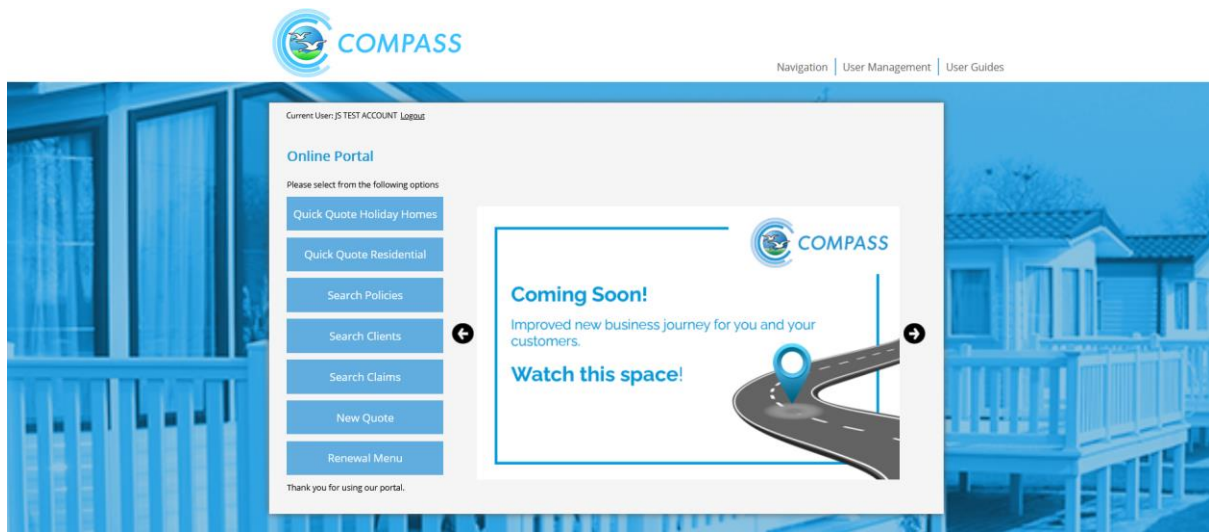
You will be issued with

- 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!

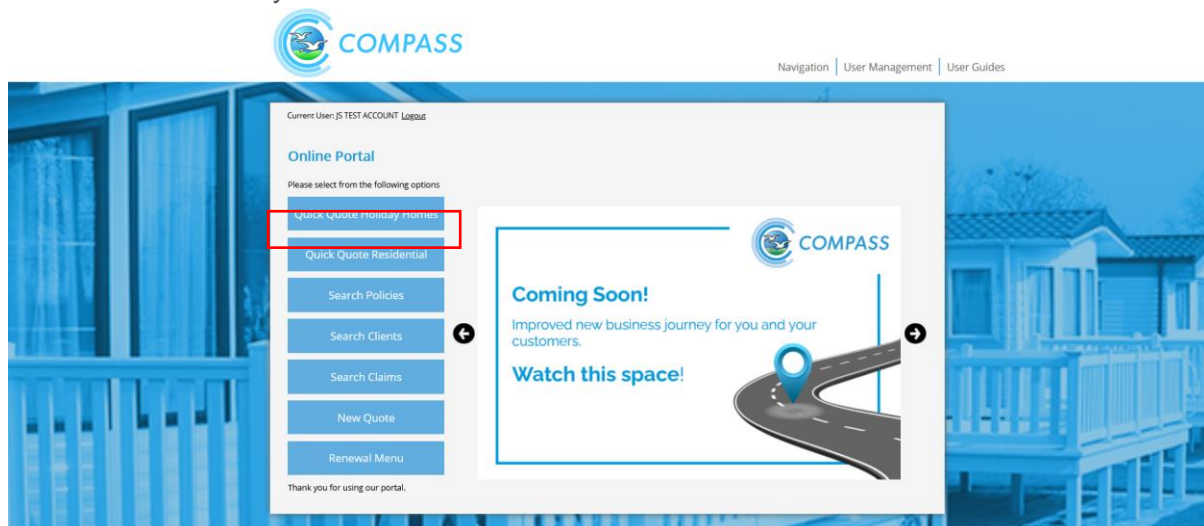
Please do not use browser navigation buttons. Please use the navigation buttons that this application provides.

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.

The screenshot shows the 'Search' screen with three tabs: 'Search for Policies', 'Search / Add Clients', and 'Search Claims'. The 'Search for Policies' tab is active. It contains several search criteria: 'Policy Holder' (text input), 'Quote ID' (text input), 'Certificate Number' (text input), 'Status' (dropdown menu), 'Property Type' (dropdown menu), 'Park' (dropdown menu), 'Pitch Number' (text input), and 'Policy Type' (dropdown menu). A 'Search' button is located below these fields. Below the search fields is a table with the following columns: 'Policy Holder', 'Property Type', 'Park', 'Pitch No', 'Status', 'Cover From', 'Cover To', 'Quote Date', and 'Quote ID/Certificate No'. The table contains one row of data: 'Mr Portal QuickQuote', 'Tan Yr Ogof Caravan Park', 'A123', 'Quote', '01/01/2020', '29/09/2020', and '16447705'. A 'Select' button is located to the right of the table row.

Policy Holder	Property Type	Park	Pitch No	Status	Cover From	Cover To	Quote Date	Quote ID/Certificate No
Mr Portal QuickQuote		Tan Yr Ogof Caravan Park	A123	Quote	01/01/2020	29/09/2020		16447705

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

Cover Start Date

Start Date? *

01/11/2021

Client Details

Client xx xxxx

Correspondence Address x xxxxxxx xxxxxxxx, xxxxxxx, CF34 0UE

Joint Policy Holder(s)? ☐

Holiday Caravan/ Lodge Details

Park Name? *

Sunnyvale Holiday Park

Structure Type? *

Caravan

Cover Required? *

New for old

Pitch Number?

ST16

Year of manufacture? *

2007

Make?

Willerby

Holiday Caravan/ Lodge Insurance

Quote No: 24581605

Client ID: CMPC302684

Cert No: CMPCHH191597914

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.

Exit

Save

Finish

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 £173.60

Premium Breakdown £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: CMPC005015

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, GL1 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

Cover Start Date

Start Date? *

Client Details

Client	Mr James Stout
Correspondence Address	10 Yetts 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?	<input checked="" type="checkbox"/>
Joint Policy Holder(s)?	<input type="checkbox"/>

Holiday Caravan/ Lodge Details

Park Name? *

Cover Required? * New for old

Pitch Number? 123

Year of manufacture? * 2021

Make? Willerby

Model?	Rio
--------	-----

Fitted with floatation device? ☐ Yes ☒ No

Included as part of sale? ☐ Yes ☒ No

Width (Ft)

Length (Ft)

Serial Number

Number of bedroom(s)?

Holiday Caravan/ Lodge Insurance

Quote No: 24556805
Client ID: CMPC813555
Cert No: N/A

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

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**

Holiday Homes

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

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

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

Holiday Homes

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

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
Cover From: 14 July 2019
Agent: Foxhouses Park Ltd
Correspondence Address: 42 Malham Drive, HARROGATE, North Yorkshire, HG3 2YR, United Kingdom

Policy Status: OnRisk
Cover To: 30 May 2020
Commission: £84.83

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
Cover From: 14/07/2019
Agent: Foxhouses Park Ltd
Correspondence Address: 42 Malham Drive, HARROGATE, North Yorkshire, HG3 2YR, United Kingdom

Policy Status: OnRisk
Cover To: 30/05/2020
Commission: £84.83

Description	Created	Created By	View Document
Product Information	08/07/2019 10:32:46	CMPPA000100	View
Policy Wording	08/07/2019 10:32:45	CMPPA000100	View
Schedule	08/07/2019 10:32:43	CMPPA000100	View
Confirm Letter	08/07/2019 10:32:35	CMPPA000100	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