



AR Portal User Guide

Quick Quote

Introduction

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

Contents

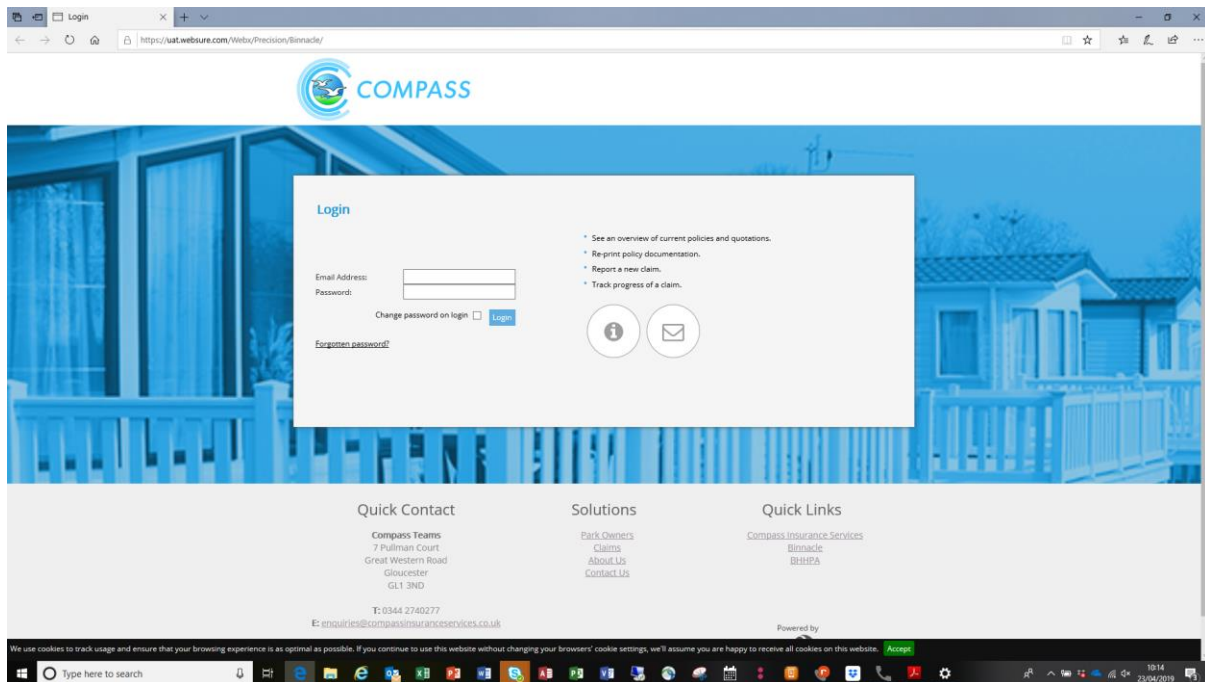
| | |
|------------------------|---|
| Introduction | 2 |
| Logging In | 3 |
| Basic Navigation | 3 |
| Quick Quote | 5 |

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



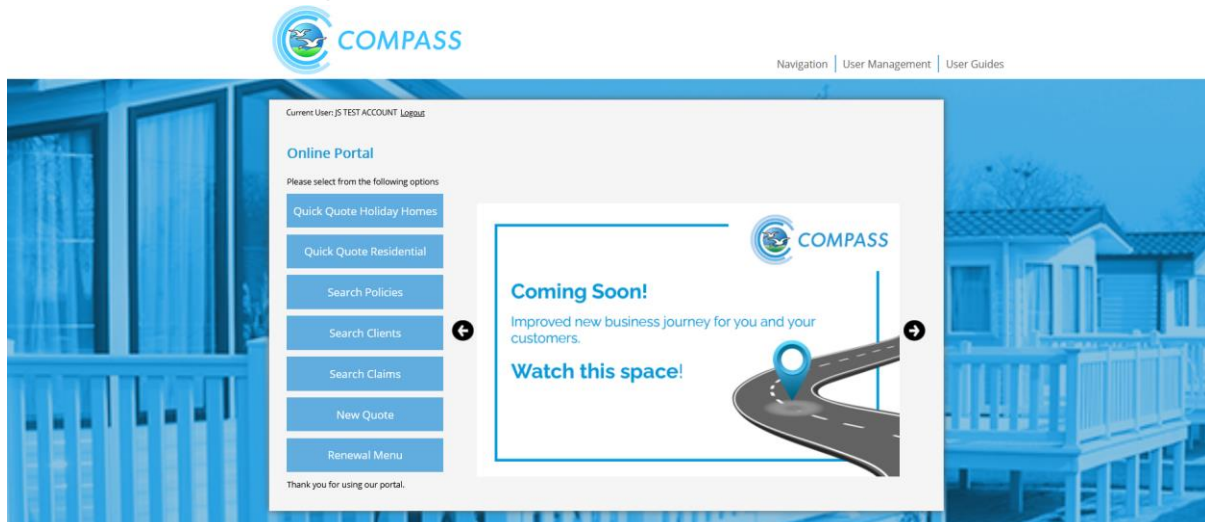
You will be issued with

- 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



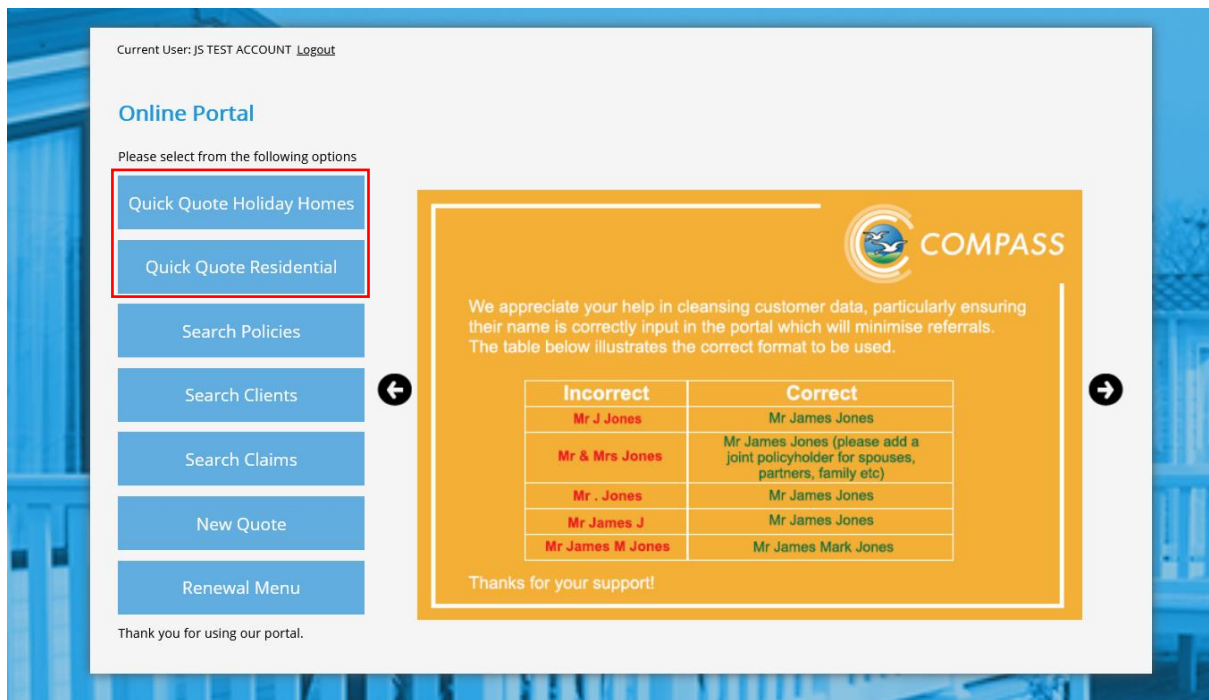
Oops!

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

Okay

Quick Quote

You can access the Quick Quote option from the main screen




Current User: JS TEST ACCOUNT [Logout](#)

Online Portal

Please select from the following options

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

Thank you for using our portal.



We appreciate your help in cleansing customer data, particularly ensuring their name is correctly input in the portal which will minimise referrals. The table below illustrates the correct format to be used.

| Incorrect | Correct |
|------------------|--|
| Mr J Jones | Mr James Jones |
| Mr & Mrs Jones | Mr James Jones (please add a joint policyholder for spouses, partners, family etc) |
| Mr . Jones | Mr James Jones |
| Mr James J | Mr James Jones |
| Mr James M Jones | Mr James Mark Jones |

Thanks for your support!

This will take you to the following screen

Holiday Caravan/ Lodge Insurance

Cover Start Date

Start Date? *

Holiday Caravan/ Lodge Details

Park Name? *

Holiday Caravan/ Lodge Sum Insured

Structure Sum Insured? * £

Contents Sum Insured? * £

Quote indication

Please note this is an indication quote only based on limited information in order to provide an indicative premium and does not form the basis of a formal quotation. To obtain a formal quotation and to proceed to cover please click the button below

Please note that fields marked with an * are mandatory.

[Main Menu](#) [Calculate](#)

Enter the relevant details and this will generate an indication premium at the bottom of the page

Cover Start Date

Start Date? *

Holiday Caravan/ Lodge Details

Park Name? *

Structure Type? *

Cover Required? *

Holiday Caravan/ Lodge Sum Insured

Structure Sum Insured? *

Contents Sum Insured? *

Quote indication

Please note this is an indication quote only based on limited information in order to provide an indicative premium and does not form the basis of a formal quotation. To obtain a formal quotation and to proceed to cover please click the button below

Please note that fields marked with an * are mandatory.

| Pro Rata Premium | Annual Premium |
|---------------------|-----------------------|
| £8.22 Including IPT | £142.80 Including IPT |

[Main Menu](#) [Reset](#) [Proceed to Quote](#)

This generates an indication of premium, it is not a formal quotation and has not been through the required sanctions checks. If you wish to proceed to a more formal quote and place the policy on risk then select the Proceed to Quote option, and the following screen will appear.

Client Information

Please update the details of your client

Individual Details

Title *

First Name(s) *

Last Name *

Contact Details

Country *

Postcode

Address *

Phone Number Mobile Phone

Email Address

Correspondence by email? *

Please note that fields marked with an * are mandatory.

This will then bring up the normal quote screen with the full set off fields to be completed

Client Details

Client: Mr James Stout
Correspondence Address: Binnacle, 7 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? *

Structure Type? *

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)?

Complete the fields and at the bottom of the screen select Next

Has the insured;

a) ever had insurance cover refused or cancelled or special terms imposed? Yes No

b) or insured family member ever been convicted or cautioned with any criminal offence, other than driving offences? Yes No

c) ever had any claims or incidents at these or any other premises in the last 5 years? Yes No

d) ever been declared bankrupt or been the subject of any winding up petition or order in this or any previous business? Yes No

Previous Insurance Details

Are details of the insured's previous insurance to be noted? Yes No

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 bring up the Quote Summary screen from where you will be able to

- Edit the Quote
- Proceed to Cover
- Email/ Print Documents

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](#)