



AR Portal User Guide
Renewal Management
(including bulk processing)

Introduction

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

Contents

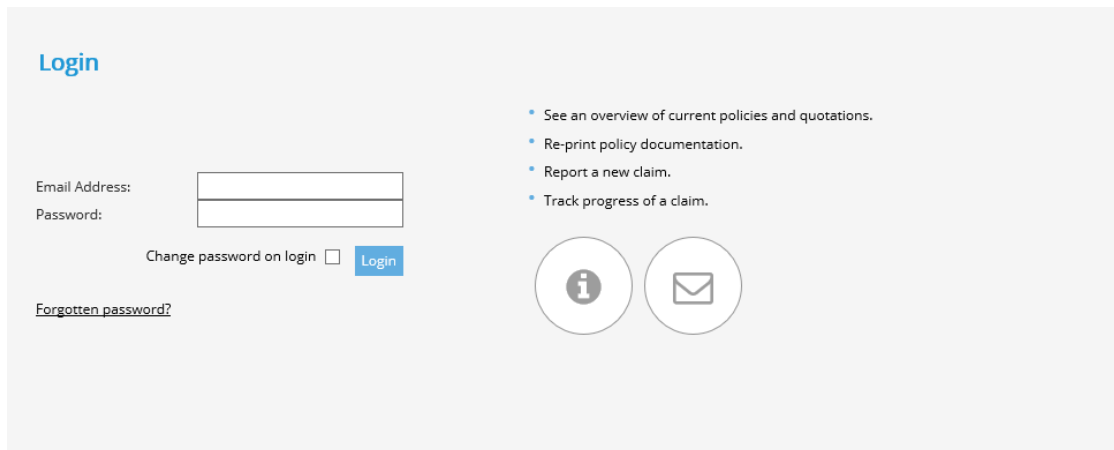
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Logging In

The following link enables you to access the login screen

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

This will bring up the following screen



Login



Email Address:

Password:

Change password on login **Login**

[Forgotten password?](#)

- See an overview of current policies and quotations.
- Re-print policy documentation.
- Report a new claim.
- Track progress of a claim.

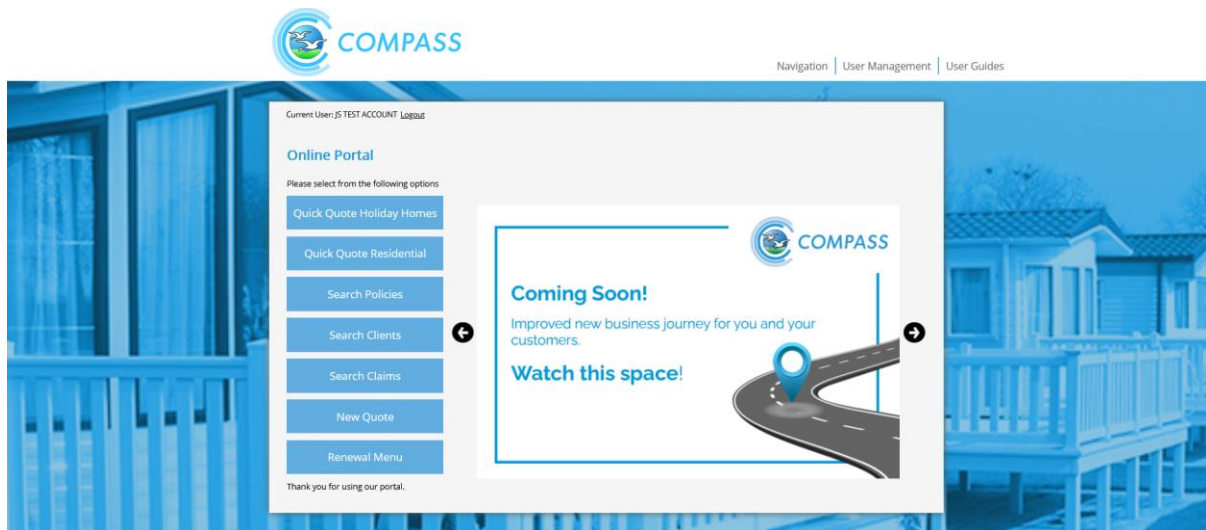
You will be issued with

- 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



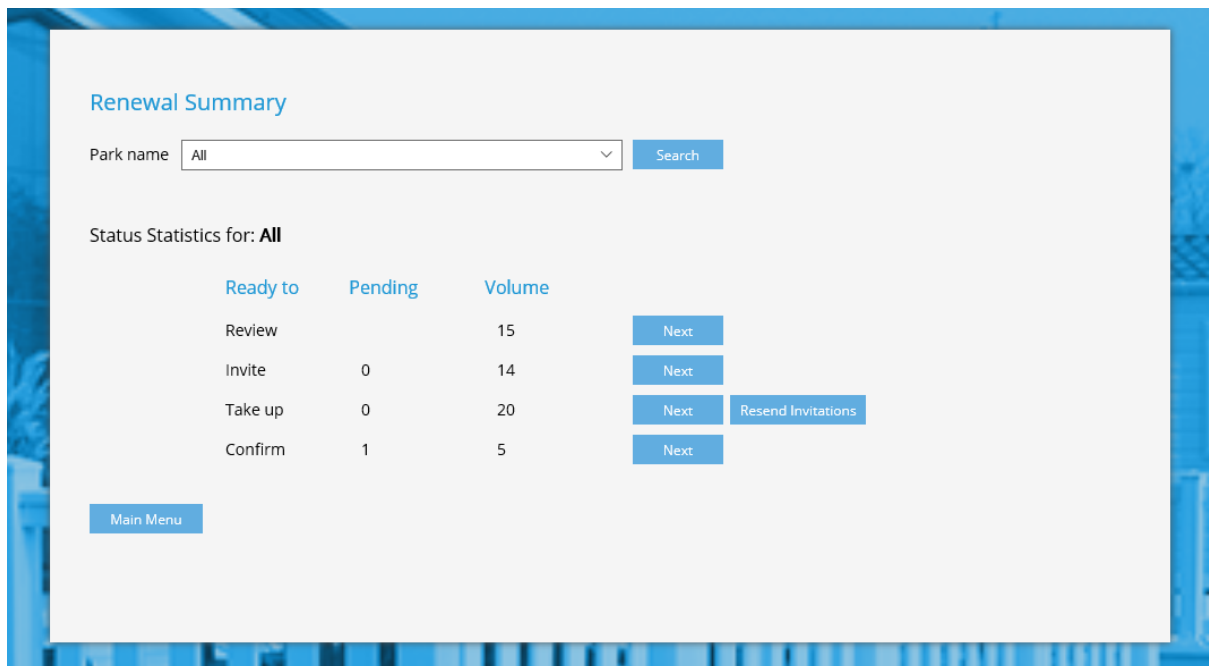
Oops!

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

Okay

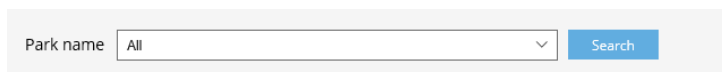
Renewals Menu

Clicking on the Renewals Menu brings up the following screen



This screen gives you an overview of the renewals for your Park or Parks

If you have multiple Parks you can view either all parks or just one of your parks using the Park Name drop down at the top of the page



From here you can access the following functions

Ready to Review – review the renewals prior to inviting them

Ready to Invite – print the renewal invitations in bulk, as a sub-set or individually

Ready to Take Up – take up renewals as a batch, a sub-set or individually

Ready to Confirm - issue or print renewal confirmations for transacted renewals

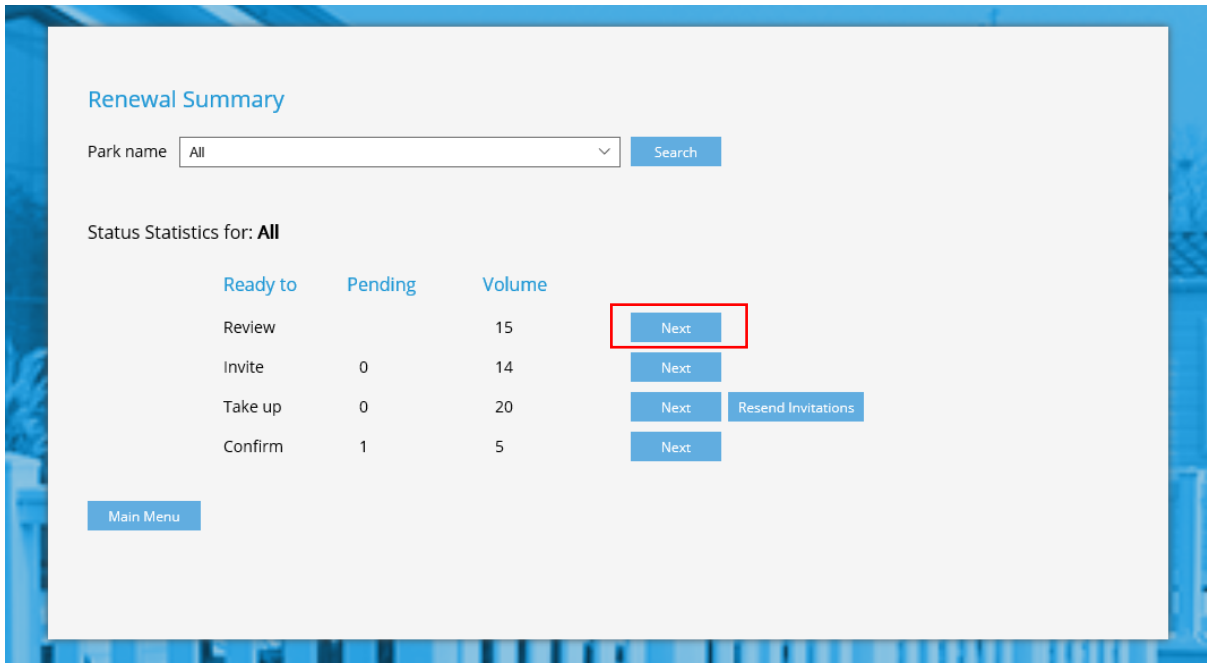
Each of the statuses has a number pending and a total volume

Volume – the total number of policies in that status

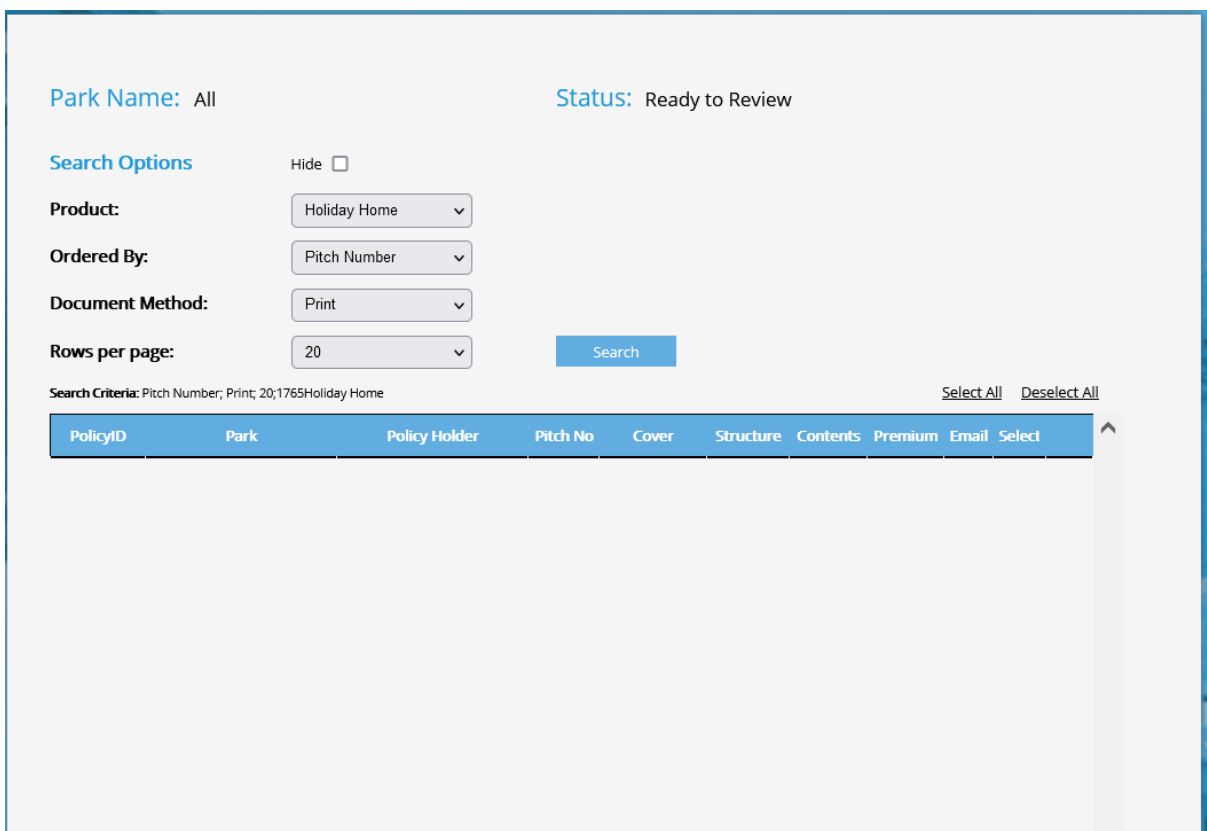
Pending – the number of policies pending in that status

Review Renewals

On the Renewals Menu, select Next alongside the Ready to Review section



This will bring up the following screen



Search Options

Search Options Hide

Product:

Ordered By:

Document Method:

Rows per page:

The menu above allows you to change the search results

- The policy product e.g Holiday, Residential
- The order of the policies by pitch number, policy ID, policyholder etc
- How documents are sent to only show those policies that are printed or emailed
- The number of rows per page from 20 to 50, 75, 100 or 125

Commands

The following commands allow you to perform functions at policy and screen level

<input type="button" value="Select All"/> <input type="button" value="Deselect All"/>	Select or deselect all records in the search
<input type="button" value="Select"/> <input type="checkbox"/>	Select just that policy
<input type="button" value="Wrench"/>	Amend the policy record
<input type="button" value="Hide"/> <input type="checkbox"/>	Hide the search criteria

Amending the Policy

If you want to amend the policy at renewal you can do this by clicking on the icon and this will take you to the policy

Holiday Home Insurance - xxx xxxxxx xxxxx

Holiday Home Insurance
Quote No: 16631205
Insured ID: CMPC311284
Cert No: CMPCHH2016467105

[Change Details](#)

Is this a Replacement holiday home? * No Yes

Client Details

Client: xxx xxxxxx xxxxx
 Correspondence Address: xx xxxxxx xxxxxxx xxxxx, xxxxxx, xxxxx

[Update Client](#)

Joint Policy Holder(s)?

Holiday Home Details

What is the name of the park that the property resides in? * Trelay Holiday Park

What is the pitch number?

Fitted with floatation device? Yes No

Holiday Home Sum Insured

What is the value of the property insured? *

What is the value of the contents insured? *

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.

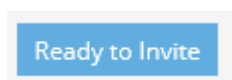
You can amend any of the details then click Next and the details of the renewal will show the change in the table

Policy Holder	Pitch No	Cover	Structure	Contents	Premium	Email	Select
xxx xxxxxx xxxxx	11x	New for old	£35,000	£1,000	£221.76	<input type="checkbox"/>	<input type="checkbox"/>

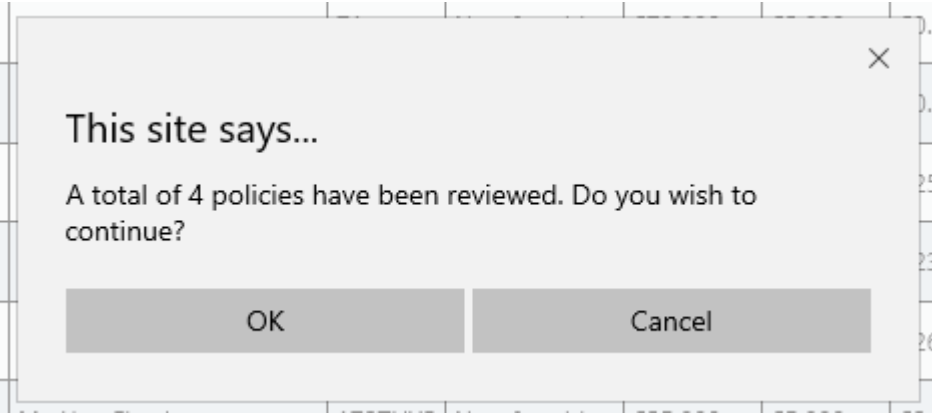
Ready to Invite

Once you have reviewed the policies and made any changes you want to make you can invite the renewals. To do this either select the renewals you want to invite or Select All.

Then click Ready to Invite



This will bring up the following warning message



Click OK and those policies will move into the next stage and the list of renewals will be updated. You can check this on the Renewal Menu

Renewal Summary

Park name

Status Statistics for: **All**

	Ready to	Pending	Volume	
Review			10	<input type="button" value="Next"/>
Invite		0	19	<input type="button" value="Next"/>
Take up		0	20	<input type="button" value="Next"/> <input type="button" value="Resend Invitations"/>
Confirm		1	5	<input type="button" value="Next"/>

Invite Renewals

On the Renewals Menu, select Next alongside the Ready to Invite section

The screenshot shows the 'Renewal Summary' page. At the top, there is a 'Park name' dropdown menu set to 'All' and a 'Search' button. Below this, the 'Status Statistics for: All' section contains a table with columns for 'Ready to', 'Pending', and 'Volume'. The rows are 'Review', 'Invite', 'Take up', and 'Confirm'. The 'Invite' row has a 'Next' button highlighted with a red box. Other 'Next' buttons are present for the 'Review', 'Take up', and 'Confirm' rows. A 'Resend Invitations' button is located to the right of the 'Take up' row. A 'Main Menu' button is at the bottom left.

	Ready to	Pending	Volume	
Review			15	Next
Invite		0	14	Next
Take up		0	20	Next Resend Invitations
Confirm		1	5	Next

This will bring up a similar screen to the Ready to Review

The screenshot shows a search results page for 'Ready to Invite' renewals. At the top, 'Park Name: All' and 'Status: Ready to Invite' are displayed. Below this, the 'Search Options' section includes a 'Hide' checkbox and four dropdown menus: 'Product' (Holiday Home), 'Ordered By' (Pitch Number), 'Document Method' (Print), and 'Rows per page' (20). A 'Search' button is located to the right of these options. Below the search options, the 'Search Criteria' are listed as 'Pitch Number; Print; 20; 1765Holiday Home'. To the right of the search criteria, there are 'All Docs' and 'Select All' buttons. The main content area is a table with the following columns: PolicyID, Park, Policy Holder, Pitch No, Cover, Structure, Contents, Premium, Email, and Select. The table is currently empty.

Search Options

Search Options Hide

Product:

Ordered By:

Document Method:

Rows per page:

The menu above allows you to change the search results

- The policy product e.g Holiday, Residential
- The order of the policies by pitch number, policy ID, policyholder etc
- How documents are sent to only show those policies that are printed or emailed
- The number of rows per page from 20 to 50, 75, 100 or 125

Commands

The following commands allow you to perform functions at policy and screen level

<input type="button" value="Select All"/> <input type="button" value="Deselect All"/>	Select or deselect all records in the search
<input type="button" value="Select"/> <input type="checkbox"/>	Select just that policy
<input type="button" value="Wrench"/>	Amend the policy record
<input type="button" value="Hide"/> <input type="checkbox"/>	Hide the search criteria
<input type="button" value="Printer"/>	Print documents

Amending the Policy

If you want to amend the policy at renewal you can do this by clicking on the icon and this will take you to the policy

Holiday Home Insurance - xxx xxxxxx xxxxx

Holiday Home Insurance
Quote No: 16631205
Insured ID: CMPC311284
Cert No: CMPCHH2016467105

Change Details

Is this a Replacement holiday home? * No Yes

Client Details

Client xxx xxxxxx xxxxx
Correspondence Address xx xxxxxx xxxxxxxx xxxxx, xxxxxx, xxxxx

[Update Client](#)

Joint Policy Holder(s)?

Holiday Home Details

What is the name of the park that the property resides in? * Trelay Holiday Park

What is the pitch number?

Fitted with floatation device? Yes No

Holiday Home Sum Insured

What is the value of the property insured? *

What is the value of the contents insured? *

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.

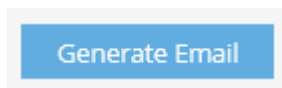
Please note that fields marked with an * are mandatory.

You can amend any of the details then click Next and the details of the renewal will show back at the Review stage with the amended details.

Printing/ Emailing Renewal Invites

Once you have reviewed the policies and made any changes you want to make you can Print or email the renewals. Always send the email customers first by selecting email in the search options and clicking search. Select the renewals you want to invite or Select All.

Then click Generate Email



This will bring up the following warning message

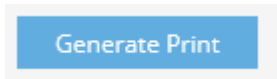
A total of 0 invitations will be emailed. Do you wish to continue?



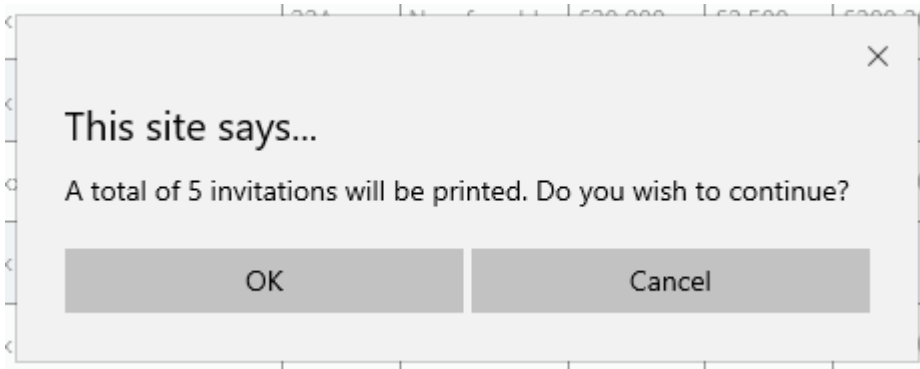
Click OK and the documents will email to the customer and cc you in (if CC'd tick box selected)

If printed policies are left, change the document method to print and click Search and select the renewals you want to invite or Select All.

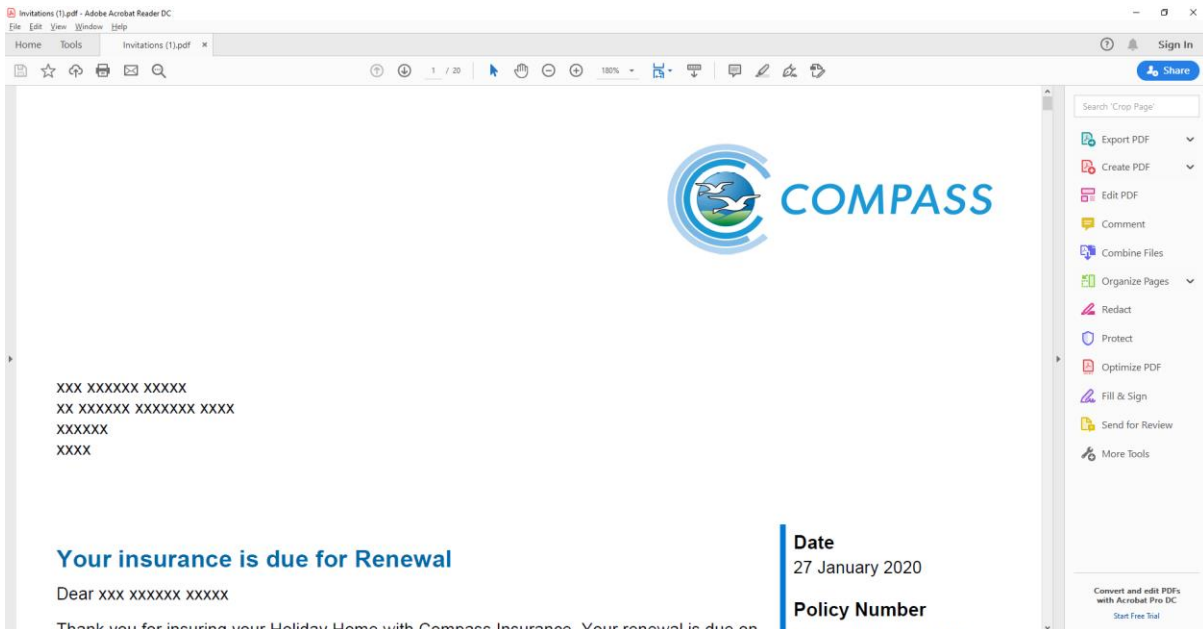
Then click Generate Print



This will bring up the following warning message



Click OK and the documents will open in pdf (or in a new browser window depending on how you have settings on your computer)



The Renewal Menu will show the updated status

Renewal Summary

Park name [Search](#)

Status Statistics for: **All**

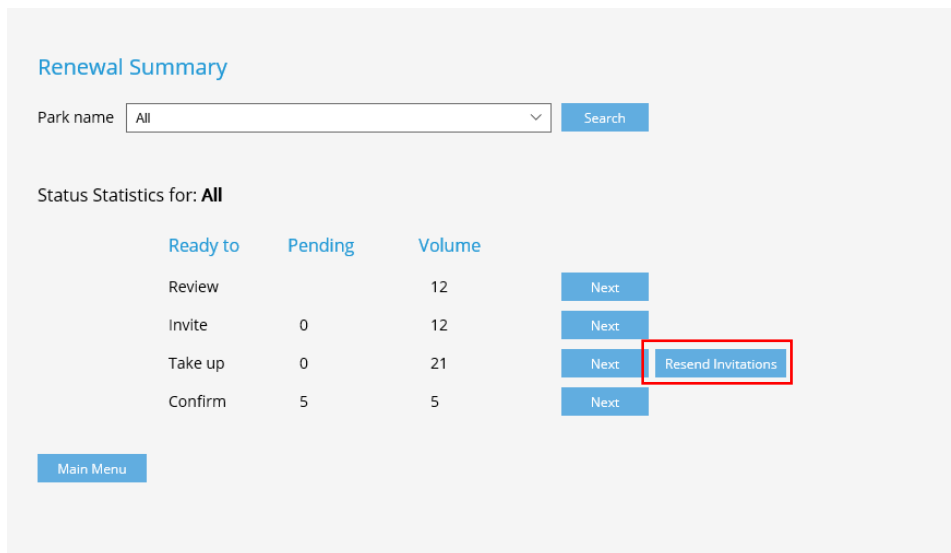
	Ready to	Pending	Volume	
Review			12	Next
Invite	0		12	Next
Take up	0		21	Next Resend Invitations
Confirm	5		5	Next

[Main Menu](#)

Resending Invitations

Once you have invited a batch of renewals you also have the option to resend or regenerate those renewal documents.

On the Renewal Menu select Resend Invitations



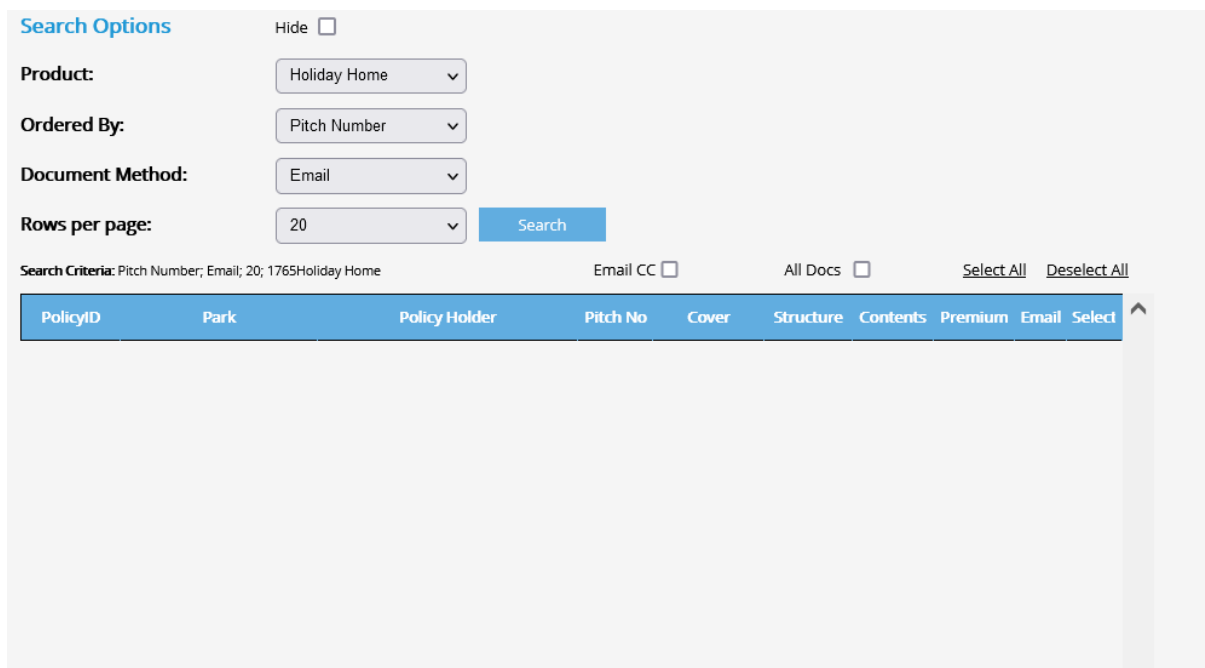
Renewal Summary

Park name: All

Status Statistics for: **All**

	Ready to	Pending	Volume	
Review			12	<input type="button" value="Next"/>
Invite	0		12	<input type="button" value="Next"/>
Take up	0		21	<input type="button" value="Next"/> <input type="button" value="Resend Invitations"/>
Confirm	5		5	<input type="button" value="Next"/>

This will bring up a list of all the policies you have previously invited for renewal.



Search Options Hide

Product: Holiday Home

Ordered By: Pitch Number

Document Method: Email

Rows per page: 20

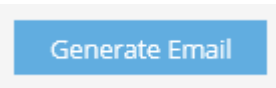
Search Criteria: Pitch Number; Email; 20; 1765Holiday Home Email CC All Docs [Select All](#) [Deselect All](#)

PolicyID	Park	Policy Holder	Pitch No	Cover	Structure	Contents	Premium	Email	Select
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From here you can select the policies you wish to invite again and select print or email using the document method and clicking search.

Always send the email customers first by selecting email in the search options and clicking search. Select the renewals you want to invite or Select All.

Then click Generate Email



This will bring up the following warning message

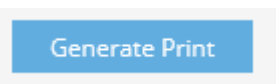
A total of 0 invitations will be emailed. Do you wish to continue?



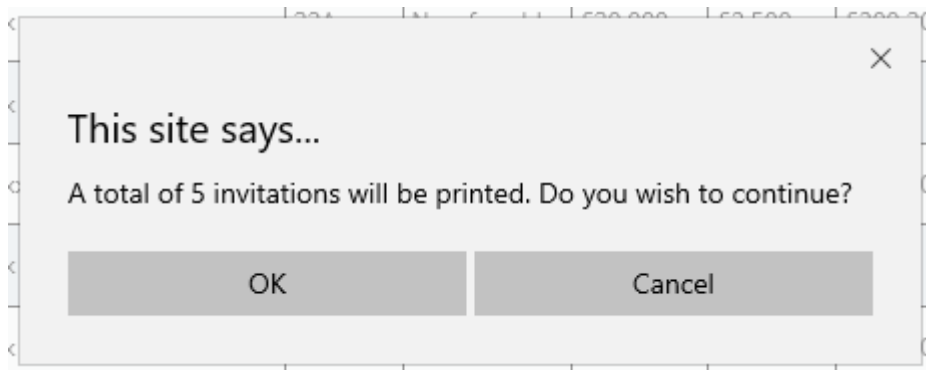
Click OK and the documents will email to the customer and cc you in (if CC'd tick box selected)

If printed policies are left, change the document method to print and click Search and select the renewals you want to invite or Select All.

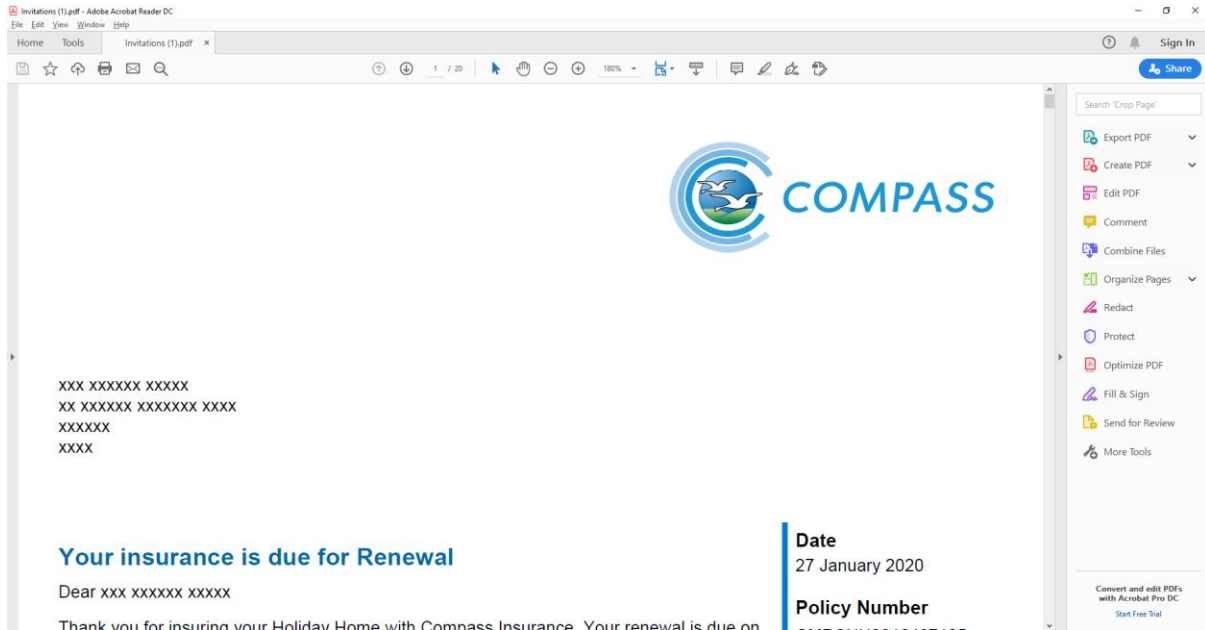
Then click Generate Print



This will bring up the following warning message

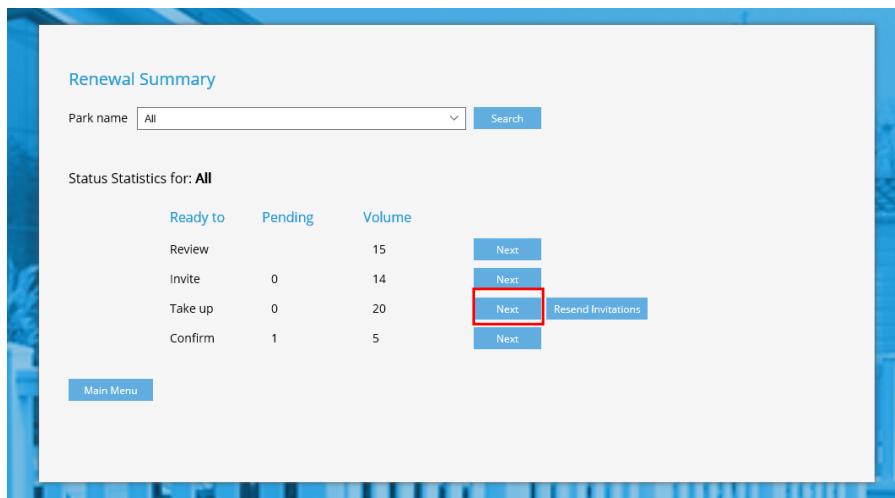


Click OK and the documents will open in pdf (or in a new browser window depending on how you have settings on your computer)



Accepting Renewals

On the Renewals Menu, select Next alongside the Take Up section



This will bring up the following screen

Search Options Hide

Ordered By:

Document Method:

Rows per page:

Search Criteria: Pitch Number; Print; 20; [Select All](#) [Deselect All](#)

PolicyID	Park	Policy Holder	Pitch No	Cover	Structure	Contents	Premium	Email	Select
16538505	Trelay Holiday Park	xxx xxxxxxx xxxxxxx		New for old	£70,000	£3,000	£0.56	<input type="checkbox"/>	<input type="checkbox"/>
16468605	Trelay Holiday Park	xx x xxxxxxx	.	New for old	£72,000	£3,000	£0.57	<input type="checkbox"/>	<input type="checkbox"/>
16469505	Trelay Holiday Park	xxx xxx xxxxxxx	10	New for old	£35,000	£1,000	£0.60	<input type="checkbox"/>	<input type="checkbox"/>
16631205	Trelay Holiday Park	xxx xxxxxxx xxxxxxx	11x	New for old	£35,000	£1,000	£221.76	<input type="checkbox"/>	<input type="checkbox"/>
16469905	Trelay Holiday Park	xxx x xxxxxxx xxx xx x xxxxx xx	14	New for old	£63,000	£12,000	£0.57	<input type="checkbox"/>	<input type="checkbox"/>
16631605	Trelay Holiday Park	xx xxxxxxx xxxxxxx	15	New for old	£40,000	£2,000	£258.72	<input type="checkbox"/>	<input type="checkbox"/>
16469105	Trelay Holiday Park	xx xxxxx xxxxxxx	16A	New for old	£60,000	£4,000	£0.49	<input type="checkbox"/>	<input type="checkbox"/>
16467005	Trelay Holiday Park	xx xxxxxxx xxxxxxxxxxxxxxx	18	New for old	£45,000	£3,000	£0.74	<input type="checkbox"/>	<input type="checkbox"/>
16468905	Trelay Holiday Park	xx xxxxxxx xxxxxxx	19	New for old	£30,000	£2,000	£0.54	<input type="checkbox"/>	<input type="checkbox"/>
16470305	Trelay Holiday Park	xx x xxxxxx	20X	New for old	£15,000	£5,000	£123.20	<input type="checkbox"/>	<input type="checkbox"/>
16470405	Trelay Holiday Park	xx x xxxxxx	23UYTS	New for old	£35,000	£5,000	£246.40	<input type="checkbox"/>	<input type="checkbox"/>
16470505	Trelay Holiday Park	xx x xxxxxxx	23RES	New for old	£37,500	£5,000	£261.80	<input type="checkbox"/>	<input type="checkbox"/>
16469805	Trelay Holiday Park	xx xxxxx xxxxx	24	New for old	£35,000	£3,000	£0.64	<input type="checkbox"/>	<input type="checkbox"/>
16469205	Trelay Holiday Park	xx x xxxxxxx	26	Market value	£10,000	£0	£0.30	<input type="checkbox"/>	<input type="checkbox"/>

<< 1 2 >> 1 to 20 of 21

Search Options

Search Options Hide

Product:

Ordered By:

Document Method:




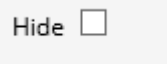

Rows per page:

The menu above allows you to change the search results

- The policy product e.g Holiday, Residential
- The order of the policies by pitch number, policy ID, policyholder etc
- How documents are sent to only show those policies that are printed or emailed
- The number of rows per page from 20 to 50, 75, 100 or 125

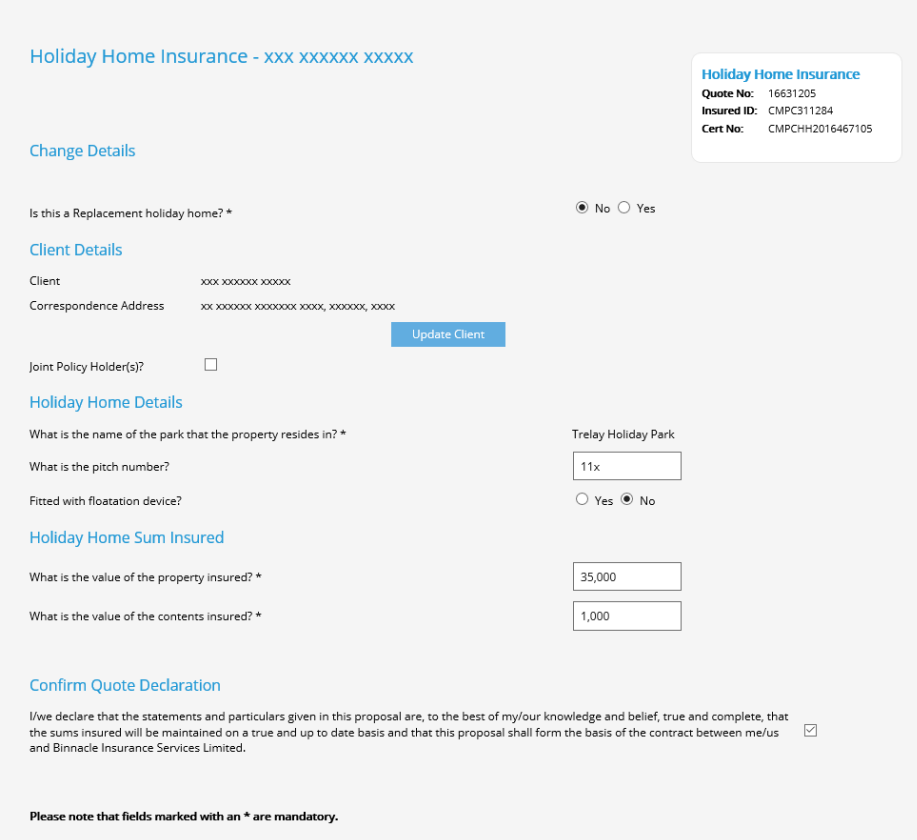
Commands

The following commands allow you to perform functions at policy and screen level

	Select or deselect all records in the search
	Select just that policy
	Amend the policy record
	Hide the search criteria
	Print documents

Amending the Policy

At this point you can still make an amend to the policy. Click the Amend icon and follow the screen to update details



The screenshot shows a web form for amending a policy. At the top, it says "Holiday Home Insurance - xxx xxxxxx xxxxx". On the right, there is a summary box with the following details:

- Holiday Home Insurance**
- Quote No:** 16631205
- Insured ID:** CMPC311284
- Cert No:** CMPCHH2016467105

The main form area is divided into several sections:

- Change Details:** "Is this a Replacement holiday home?*" with radio buttons for "No" (selected) and "Yes".
- Client Details:** Fields for "Client" (xxx xxxxxx xxxxx) and "Correspondence Address" (xx xxxxxxx xxxxxxx xxxxx, xxxxxxx, xxxxx). An "Update Client" button is present.
- Holiday Home Details:** "What is the name of the park that the property resides in?*" (Trelay Holiday Park), "What is the pitch number?" (11x), and "Fitted with floatation device?" (radio buttons for "Yes" and "No", with "No" selected).
- Holiday Home Sum Insured:** "What is the value of the property insured?*" (35,000) and "What is the value of the contents insured?*" (1,000).
- Confirm Quote Declaration:** A declaration statement with a checked checkbox: "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."

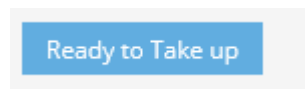
A note at the bottom states: "Please note that fields marked with an * are mandatory."

You can amend any of the details then click Next and the details of the renewal will show back at the Review stage with the amended details.

Accepting Renewals

Once you have reviewed the policies and made any changes you want to make you can Accept the renewals. To do this either select the renewals you want to accept or Select All.

Then click Ready to Take Up

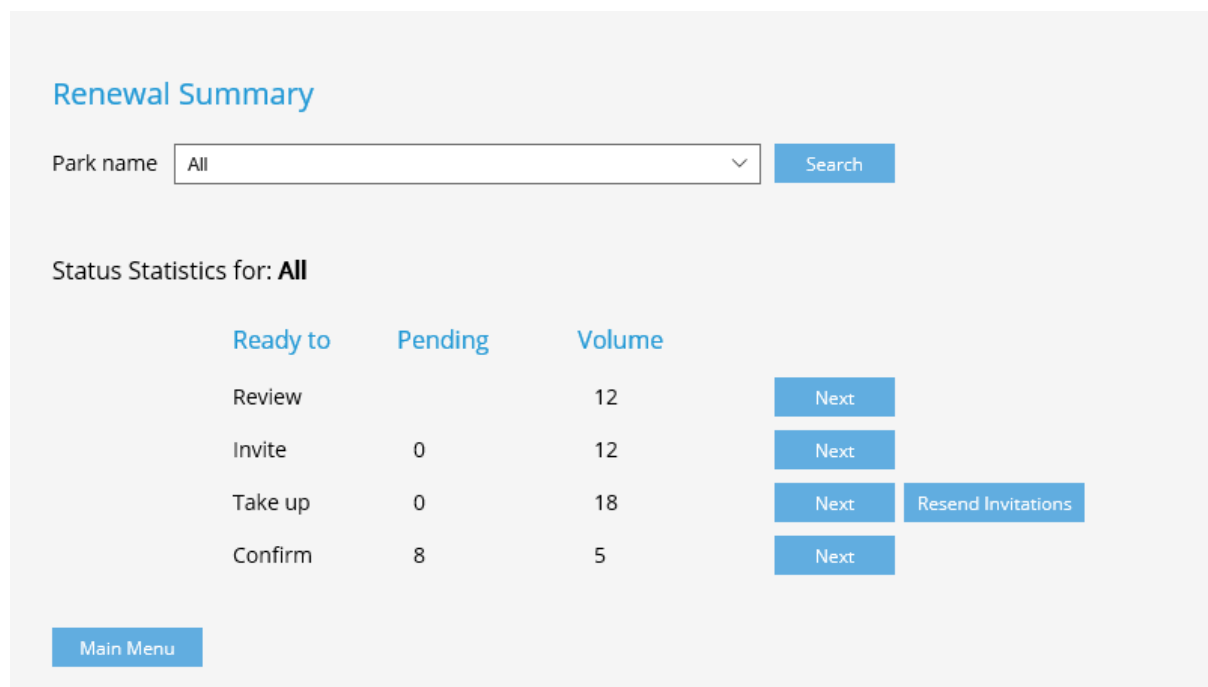


This will bring up the following warning message

A total of 0 renewals will be taken up. Do you wish to continue?



These policies will then be removed from the list and the renewal menu updated



Renewal Summary

Park name:

Status Statistics for: **All**

	Ready to	Pending	Volume	
Review			12	<input type="button" value="Next"/>
Invite		0	12	<input type="button" value="Next"/>
Take up		0	18	<input type="button" value="Next"/> <input type="button" value="Resend Invitations"/>
Confirm		8	5	<input type="button" value="Next"/>

Renewals Transaction

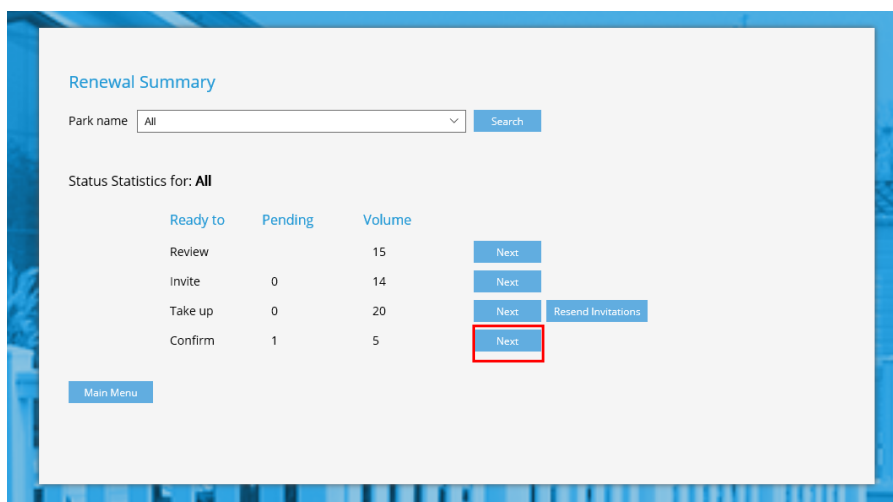
As the process for accepting renewal in bulk requires the system to process a financial transaction and create a policy debit this is done as an overnight process.

Therefore, you will need to wait for this process to happen before you can print or generate Renewal Confirmations.

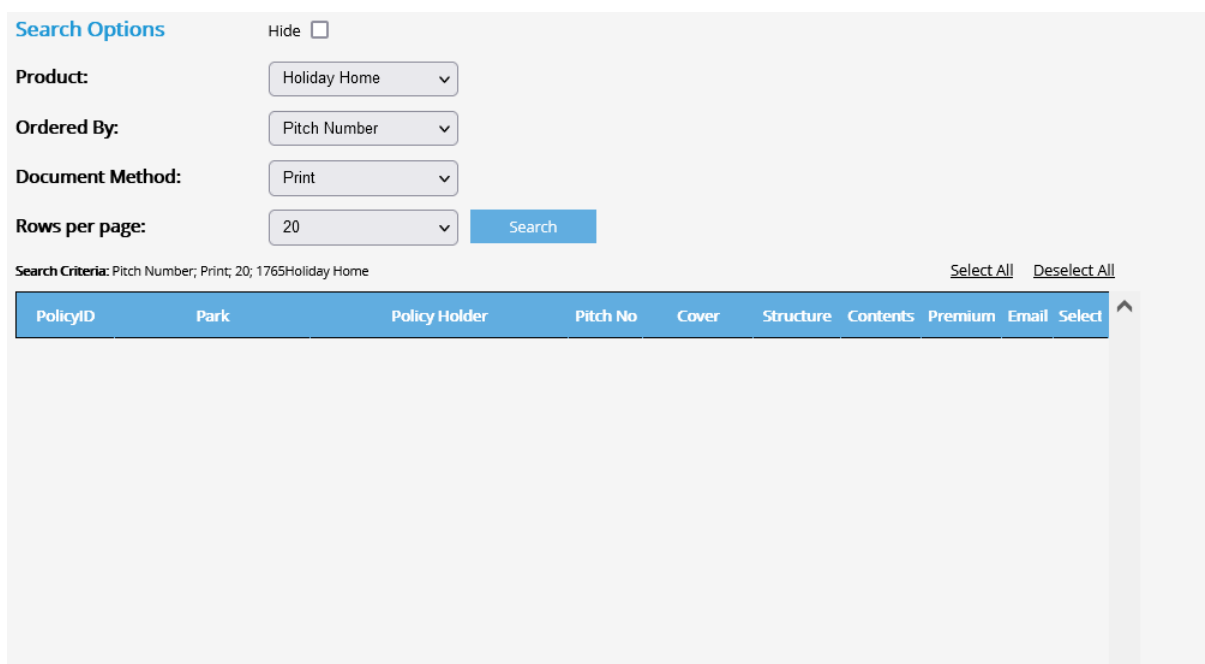
If you need to provide a customer with a renewal confirmation urgently you can still follow the individual policy renewal process which can be done in real time.

Renewal Confirmations

On the Renewals Menu, select Next alongside the Take Up section



This will bring up the following screen



Search Options

Search Options Hide

Product: Holiday Home ▼

Ordered By: Pitch Number ▼

Document Method: Print ▼

Rows per page: 20 ▼

Search

The menu above allows you to change the search results

- The policy product e.g Holiday, Residential
- The order of the policies by pitch number, policy ID, policyholder etc
- How documents are sent to only show those policies that are printed or emailed
- The number of rows per page from 20 to 50, 75, 100 or 125

Commands

At this stage most of the policy action icons are not available as the renewal has been confirmed and only the confirmation documents are outstanding.

Select All Deselect All Select or deselect all records in the search

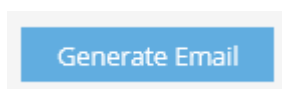
Select Select just that policy

Hide Hide the search criteria

Printing Confirmations

Always send the email customers first by selecting email in the search options and clicking search. Select the renewals you want to confirm or Select All.

Then click Generate Email



This will bring up the following warning message

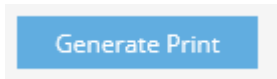
A total of 0 renewal confirmations will be Emailed. Do you wish to continue?



Click OK and the documents will email to the customer and cc you in (if CC'd tick box selected)

If printed policies are left, change the document method to print and click Search and select the renewals you want to invite or Select All.

Then click Generate Print



This will bring up the following warning message

A total of 0 renewal confirmations will be printed. Do you wish to continue?



Click OK and the documents will open in pdf (or in a new browser window depending on how you have settings on your computer)

