BROKER TRAINING GUIDE

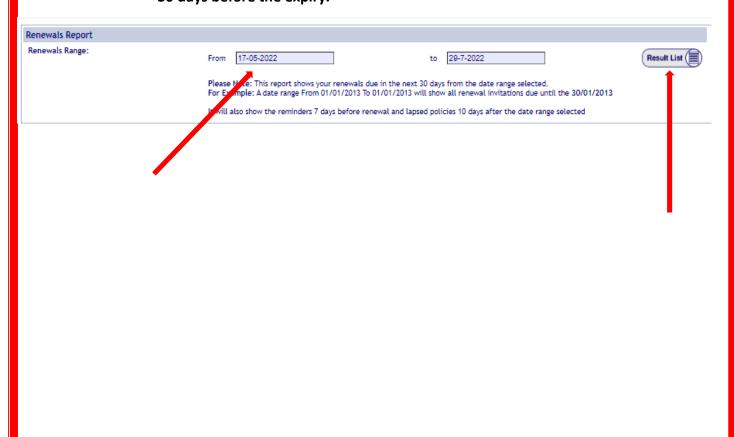## How to Navigate Renewals

Sending Invites to your customers

1. **Go to Reports > Annual Renewals.**

    Using the renewal system to renew your customers policy will give them a 10% discount on the new contracts AMT prices. The 10% discount only applies to Voyager Plus policies.
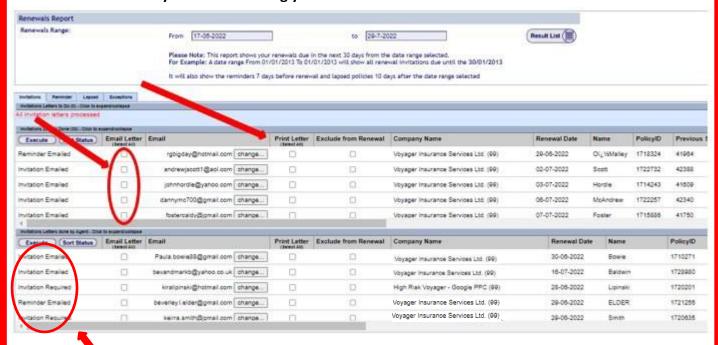
HOME∨	QUOTE AND BUY∨	REPORTS∨	ADMINISTRATION∨	HELP∨	ACCOUNT ∨

Invoicing/ Credit Control	Renewals	System Reports	Analytics	Policy/Screening Admin
Invoices	Annual Renewals	Credit Card Only	Analytics	Change Policy Product
UW Totals	Renewals Summary	Exports		Transfer Policies
		Agents Per Product		
		Agent Contacts		
		User Details Report		

2. **You will be asked to choose a range of dates to search between. To make sure you capture the renewal you are looking for, always use a range of about 30 days and then click the 'Results List'. The date you are searching for is not the expiry date but 30 days before the expiry.**

Renewals Report

Renewals Range:

From `17-05-2022`   to `29-7-2022`   (Result List ☰)

Please Note: This report shows your renewals due in the next 30 days from the date range selected.
For Example: A date range From 01/01/2013 To 01/01/2013 will show all renewal invitations due until the 30/01/2013

It will also show the reminders 7 days before renewal and lapsed policies 10 days after the date range selected

3. Here you can email the invitation and it will go to the email shown next to it. You must tick the boxes of the invites you would like to send then click 'Execute' at the top left of the list. If you have no email in the renewal your other option is to 'print letter'.

From this page you can send the invitations and reminders to your customer where they can renew themselves through the online link. Doing it this way will still mean that you will be earning your full commission.
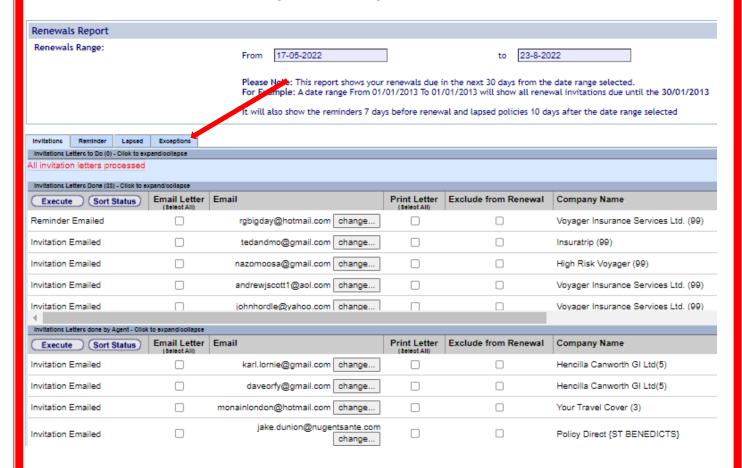

4. Invitations are designed to be sent out 30 days before expiry and reminders are 15 days before expiry.

5. Once you have actioned the initial invitation, the renewal will drop down into the next list. It should show as 'invitation Emailed/Printed'. The bottom list requires no action from you.

6. Once you have completed your Invitations, you can click the "Reminder" tab at the top, this should then show you all policies due to renew within 15 days and you can repeat the same process as above to send out the "Reminder" emails.
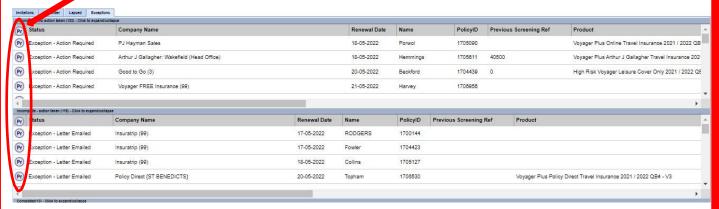
7. Lastly you need to tackle "Exceptions" by clicking the "Exceptions" tab.

This page shows you the reason for it becoming an "Exception". An exception is when something has changed from the previous year meaning we cannot offer the exact same policy as last year. Sometimes the system will put policies in exceptions due to an insured individual moving into the next age band (this is the most common reason).

Renewals Report

Renewals Range:

| From | 17-05-2022 | to | 23-8-2022 |

Please Note: This report shows your renewals due in the next 30 days from the date range selected.
For Example: A date range From 01/01/2013 To 01/01/2013 will show all renewal invitations due until the 30/01/2013

It will also show the reminders 7 days before renewal and lapsed policies 10 days after the date range selected

| Invitations | Reminder | Lapsed | Exceptions |

Invitations Letters to Do (0) - Click to expand/collapse

All invitation letters processed

Invitations Letters Done (33) - Click to expand/collapse

Execute	Sort Status	Email Letter (Select All)	Email		Print Letter (Select All)	Exclude from Renewal	Company Name
Reminder Emailed		☐	rgbigday@hotmail.com	change...	☐	☐	Voyager Insurance Services Ltd. (99)
Invitation Emailed		☐	tedandmo@gmail.com	change...	☐	☐	Insuratrip (99)
Invitation Emailed		☐	nazomoosa@gmail.com	change...	☐	☐	High Risk Voyager (99)
Invitation Emailed		☐	andrewjscott1@aol.com	change...	☐	☐	Voyager Insurance Services Ltd. (99)
Invitation Emailed		☐	johnhordle@yahoo.com	change...	☐	☐	Voyager Insurance Services Ltd. (99)

Invitations Letters done by Agent - Click to expand/collapse

Execute	Sort Status	Email Letter (Select All)	Email		Print Letter (Select All)	Exclude from Renewal	Company Name
Invitation Emailed		☐	karl.lornie@gmail.com	change...	☐	☐	Hencilla Canworth GI Ltd(5)
Invitation Emailed		☐	daveorfy@gmail.com	change...	☐	☐	Hencilla Canworth GI Ltd(5)
Invitation Emailed		☐	monainlondon@hotmail.com	change...	☐	☐	Your Travel Cover (3)
Invitation Emailed		☐	jake.dunion@nugentsante.com change...		☐	☐	Policy Direct {ST BENEDICTS}

8. Once you have located the renewal, you will need to click on the "Pr" button the begin the "manual re-quote"

Pr	Status	Company Name	Renewal Date	Name	PolicyID	Previous Screening Ref	Product
Pr	Exception - Action Required	PJ Hayman Sales	18-05-2022	Porwol	1705090		Voyager Plus Online Travel Insurance 2021 / 2022 QB
Pr	Exception - Action Required	Arthur J Gallagher: Wakefield (Head Office)	18-05-2022	Hemmings	1705611	40500	Voyager Plus Arthur J Gallagher Travel Insurance 202
Pr	Exception - Action Required	Good to Go (3)	20-05-2022	Beckford	1704439	0	High Risk Voyager Leisure Cover Only 2021 / 2022 QB
Pr	Exception - Action Required	Voyager FREE Insurance (99)	21-05-2022	Harvey	1706956		

Incomplete - action taken (119) - Click to expand/collapse

Pr	Status	Company Name	Renewal Date	Name	PolicyID	Previous Screening Ref	Product
Pr	Exception - Letter Emailed	Insuratrip (99)	17-05-2022	RODGERS	1700144		
Pr	Exception - Letter Emailed	Insuratrip (99)	17-05-2022	Fowler	1704423		
Pr	Exception - Letter Emailed	Insuratrip (99)	18-05-2022	Collins	1705127		
Pr	Exception - Letter Emailed	Policy Direct (ST BENEDICTS)	20-05-2022	Topham	1706530		Voyager Plus Policy Direct Travel Insurance 2021 / 2022 QB4 - V3

Completed(10) - Click to expand/collapse

Note: the exceptions part of the renewals system will not show you if any additional extras have been taken last year. You will need to check this against the previous policy before requoting.

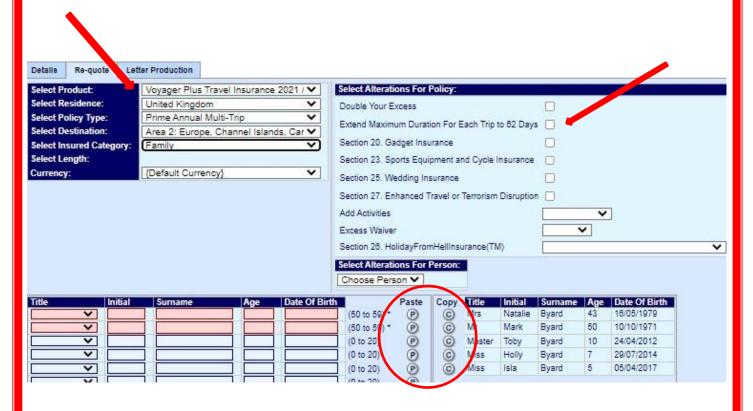**9.** To begin re-quoting the policy, you must go to the "re-quote" tab.

This page shows you the reason for it becoming an "Exception". An exception occurs when certain details from the previous policy fail to map at renewal due to changes in age, optional extras, destination etc. This means the automatic renewal generation process cannot take place and therefore requires manual intervention.
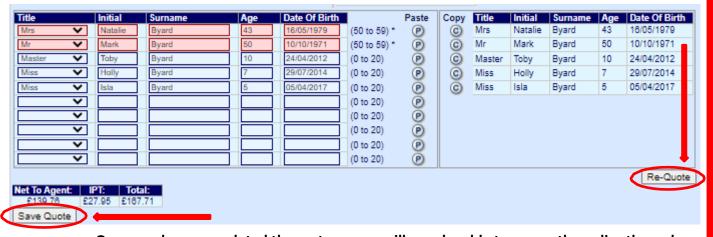

Details	Re-quote	Letter Production

Exception Details:

	Product:	Policy Type:	Destination:	Insured Cat:
Original Policy Details:	Voyager Plus Travel Insurance 2021 / 2022 QB4	Prime Annual Multi-Trip	Area 2: Europe, Channel Islands, Canary Islands, Isle of Man, Madeira & Iceland	Family
Renewal Policy Details:				

Reasons For Exception:
- Product not mapped - Max Age Exceeded

Persons on Policy:

Name:	Age:	Max Age Allowed:
Mrs Natalie Byard	43	49
Mr Mark Byard	50	49
Master Toby Byard	10	20
Miss Holly Byard	7	20
Miss Isla Byard	5	20

Current Status:
Exception - Action Required

10. First you will need to fill in this section. Remember to Re-quote on the same basis they had last year unless they have requested a change. They will get a 10% discount on any changes they make at renewal.

You can copy and paste the personal details over from the old policy by using these buttons labelled as "C" and "P".

11. After you have done the above click the "re-quote" button and it will show the new price below. Click "save quote".

Once you have completed these steps, you will now be able to renew the policy through "Quote and Buy" and will now be able to send the renewal invite which is shown in the next step. If you are ready to renew the policy skip to step 14.

Voyager
Insurance

12. Once you have saved the quote, to send the letter, select the 'Letter Production' tab. You will have the option to select a file.

VoyagerPlus2022_Broker_Renewals_Exception_Quote_V1.html
VoyagerPlus2022_Broker_Renewals_Invitation_V1.html
VoyagerPlus2022_Broker_Renewals_Exception_No_Quote_V1.html

13. You will have the above options to choose from. Once you have selected the correct letter, put the number '1' under position and select the tick and save it. In the top right corner, you will be able to preview, email and print the letter.

Which letter to use?

Invitation = If the policy has fallen into Exceptions without any change to the policy (e.g., age band changing) then you should send the "Invitation" listed above.

Exception Quote = this should be used when we are unable to offer the same as last year, but we can still offer an annual quote of some sort.

Exception No Quote = this should be used when we are unable to offer an annual policy anymore. Most common scenarios to use this letter would be when somebody has breached the maximum age for the annual policy. This letter will encourage the customer to call you to discuss, in the above example the idea would be so that you can provide them some Single Trip quotes.

14. Now you are ready to renew your client's annual policy. From the homepage, you need to hit Quote & Buy > Annual Renewals

15. You can search via any of the details listed in this picture and then click next.

16. Select the Policy you want to renew from the list and then click "next"

17. You will be presented with this page. You will need to click through the pages with "next" button and ask the medical questions as if it were a new quote. You can make any amendments through the "Amend or Upgrade" Button e.g change destination or add a person.

Button Bar

📄 Policy Wording

📄 New Quote

Your renewal Details

Product:	Voyager Plus Travel Insurance 2022 / 2023 QB4
Policy Type:	Prime Annual Multi-Trip
Destination:	Area 2: Europe, Channel Islands, Canary Islands, Isle of Man, Madeira & Iceland
Insured Category:	Individual(s)
Insured Travellers:	Mrs Jacqueline Smith
Renewal Date:	02/09/2022
Insurance Premium:	£ 75.5
IPT:	£ 15.1
Total:	£ 90.6

Need to amend Policy or upgrade, click here

Amend or Upgrade

◀ Previous

Next ▶

Help Bar

Please confirm the details of your renewal and click 'Next' to proceed

For more details, please contact your suplier.