

# VoyagerProtect Broker Guide

## Policy Setup



### Step 1 : Log in

Log in to the WEBroker portal either by visiting:

[www.WEBroker.co.uk](http://www.WEBroker.co.uk)

or

[www.VoyagerInsurance.com/log-in/](http://www.VoyagerInsurance.com/log-in/)

WELCOME TO THE VOYAGER INSURANCE LOGIN PAGE

Having trouble logging in?  
Call the Broker Support Team +44 (0) 1483 562 662 (9.00am-5.30pm, Mon-Fri)

Please enter your details and click Login

Email Address:

Password:

**LOGIN**

For security purposes your IP address will be logged to prevent unauthorised access attempts.

Forgotten your login details? Contact the Broker Support Team:  
Telephone: +44 (0) 1483 562 662 | Email: [enquiries@voyagerins.com](mailto:enquiries@voyagerins.com)  
Open: 9.00am-5.30pm, Mon-Fri (excluding English Public Holidays)

By accessing this site using your log-in, you agree to:  
a) Abide by our Voyager Insurance Services Ltd. Terms Of Business Agreement  
b) You comply with the current Data Protection Act and GDPR rules and regulations  
c) You acknowledge that all use of the Voyager WEBroker system is in accordance with our [Privacy Policy](#) and where you answer questions you are obtaining consent for all the data entered by you as an agent of your customer.

### Step 2 : Enter the quoting system

Hover your mouse over the “Quote and Buy” menu on the grey bar.

When the menu appears below, select the option for “Commercial Quote”.

Home **Quote and Buy** Reports Administration Help

Travel Insurance Broker Support Team: +44 (0) 1483 562 662  
Home Insurance Broker Support Team: +44 (0) 1483 806 815  
Phonelines Open: 9am-5.30pm, Monday-Friday (UK time, excluding English Public Holidays)

Logged in as:  **Logout**

Specific Quote  
**Commercial Quote**  
Annual Renewals  
Medical Screening

Find a P  **Find** Surname:  **Find** Postcode:  **Find**

[Click Here To See Our New Video Tutorials](#)

### Step 3 : Check Eligibility

When the screen loads you will be presented with one question. Confirm the answer with the client and select the relevant **yes/no** option.

Once each question is answered then the next question will populate. Repeat until all questions are answered.

If ANY of these answers are a “No” then they do not fit the eligibility for the product and we are unable to obtain a quote. You will be unable to proceed in this case.

Click **Next** →

VoyagerProtect

Eligibility Quote Details Your Detail Summary Payment Policy Documents

**ELIGIBILITY**

Does your Client consent, on behalf of all those to be insured, for us to collect and process personal information, to obtain a quote for insurance cover? Yes **EDIT**

Please Note: If you do not have consent, we are unable to provide an accurate quote for insurance cover.

Voyager Insurance will not share your client's data with any 3rd parties other than during the course of administering their policy.

For more information on how and why we collect data and your rights please see our privacy notice.

Please confirm the Company seeking cover is domiciled in the UK or an EEA country. Yes **EDIT**

Please confirm that the policy will be paid for by the employer and that 80% of employees who are eligible (by their employee level or job role) for the Employer Paid Travel Insurance will be enrolled in the group. Yes **EDIT**

**NEXT**

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### Step 4 : Complete the quote details

Your company name should populate the “Selling on behalf of an Agent” field; if your company set up includes ‘Child’ companies or offices you will be able to select them here.

Next, indicate how many employees will be covered and under what category by using the arrows besides the boxes.

E.g. One employee being named alone would be an individual. One employee being named with their partner and/or children would be one Couple/Family.

At this stage, also mark whether any optional policy extensions are required. **Please Note:** These will be added to the whole policy.

**Please Note:** The maximum adult age is 69 and the maximum age for a child is 18, increasing to 23 if in full-time education.

VoyagerProtect

Eligibility Quote Details Your Detail Summary Payment Policy Documents

QUOTE DETAILS

Selling on behalf of an Agent?

Who do you need to insure?

Individual Couple/Family Terrorism Cover Hazardous Activities Wintersports

0 0

### Step 5 : Select a level of cover

As you add employees to the quote, prices below will be calculated for the three levels of cover.

Once all employees and optional policy extensions have been added, press “Select” on the level of cover the client wishes to proceed with.

For more information on the breakdown of the premium and the cover in place, press “More Info” and further details will appear below. You can also access the VoyagerProtect policy wording and IPID in this drop-down.

Click **Next** →

Who do you need to insure?

Individual Couple/Family Terrorism Cover Hazardous Activities Wintersports

2 2

VoyagerProtect ESSENTIALS £659.23 Select

VoyagerProtect MOST POPULAR SUPER £725.16 Select

VoyagerProtect ENHANCED £824.04 Select

MORE INFO

NEXT ▶

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## Policy Setup

### Step 6 : Complete the company information section

Input the name of the insured company	<b>COMPANY INFORMATION</b>
Input the name of Insured Company Contact here	Insured Company Full Name: Butcher's Bakers and Candlestick Makers
Input an email we can use for contact	Insured Company Contact Name: Lauren Butcher
Add a brief description of the business	Insured Company Contact Email: lbutcher@voyagerins.com
Start typing their address and country of domicile, each box will populate a drop down with options you can select	Insured Company Summary Description of Business: Baker and candlestick maker
Select the date when the client wants cover to begin	Address: Voyager Insurance, Unit 12-14, 13-21 High Street, GUILDFORD. Country: United Kingdom
	Start Date: SEPTEMBER 3 (TODAY), SEPTEMBER 4 (TOMORROW), SEPTEMBER 5 (SATURDAY), SEPTEMBER 6 (SUNDAY), OTHER
	<b>YOUR QUOTE: £725.16</b> (includes insurance premium tax) <a href="#">MORE</a>

### Step 7 OPTION 1 : Inputting the employees' personal details

At this stage you will be given the section to input the insured's details.	<b>SCHEDULED OF INSURED PERSONS</b>																																																																											
You will be given one row for each individual employee	<table border="1"> <thead> <tr> <th>#</th> <th>Member Name</th> <th>Policy Type</th> <th>Member Type</th> <th colspan="3">Date of Birth</th> </tr> </thead> <tbody> <tr> <td colspan="7"><b>INDIVIDUALS</b></td> </tr> <tr> <td>1</td> <td>FIRSTNAME/SURNAME</td> <td>Individual</td> <td>Employee</td> <td>DAY</td> <td>MONTH</td> <td>YEAR</td> </tr> <tr> <td>2</td> <td>FIRSTNAME/SURNAME</td> <td>Individual</td> <td>Employee</td> <td>DAY</td> <td>MONTH</td> <td>YEAR</td> </tr> <tr> <td colspan="7"><b>COUPLE/FAMILIES/SINGLE PARENT FAMILIES</b></td> </tr> <tr> <td rowspan="2">-</td> <td>FIRSTNAME/SURNAME</td> <td>Couple/Family</td> <td>Employee</td> <td>DAY</td> <td>MONTH</td> <td>YEAR</td> </tr> <tr> <td>FIRSTNAME/SURNAME</td> <td>Couple/Family</td> <td>Partner</td> <td>DAY</td> <td>MONTH</td> <td>YEAR</td> </tr> <tr> <td></td> <td></td> <td></td> <td><b>ADD CHILD</b></td> <td></td> <td></td> <td></td> </tr> <tr> <td rowspan="2">-</td> <td>FIRSTNAME/SURNAME</td> <td>Couple/Family</td> <td>Employee</td> <td>DAY</td> <td>MONTH</td> <td>YEAR</td> </tr> <tr> <td>FIRSTNAME/SURNAME</td> <td>Couple/Family</td> <td>Partner</td> <td>DAY</td> <td>MONTH</td> <td>YEAR</td> </tr> <tr> <td></td> <td></td> <td></td> <td><b>ADD CHILD</b></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	#	Member Name	Policy Type	Member Type	Date of Birth			<b>INDIVIDUALS</b>							1	FIRSTNAME/SURNAME	Individual	Employee	DAY	MONTH	YEAR	2	FIRSTNAME/SURNAME	Individual	Employee	DAY	MONTH	YEAR	<b>COUPLE/FAMILIES/SINGLE PARENT FAMILIES</b>							-	FIRSTNAME/SURNAME	Couple/Family	Employee	DAY	MONTH	YEAR	FIRSTNAME/SURNAME	Couple/Family	Partner	DAY	MONTH	YEAR				<b>ADD CHILD</b>				-	FIRSTNAME/SURNAME	Couple/Family	Employee	DAY	MONTH	YEAR	FIRSTNAME/SURNAME	Couple/Family	Partner	DAY	MONTH	YEAR				<b>ADD CHILD</b>			
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You will also be offered one section for each couple/family/single parent family. Input the names and DOBs for each adult then select "Add Child" to add a row for a dependent child.																																																																												
For Single Parent Families, input the name of the adult, add a child and input their details on the child line. Leave the partner line blank.	<b>NEXT ▶</b>																																																																											
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### Step 7 OPTION 2 : Using the Excel Spreadsheet

When issuing a policy for a large number of people you may find it more convenient to upload the names rather than inputting them manually and risk the system timing out before you complete the personal details page.

In the first instance you should email the quotation to the insured using the template provided and request the details of the insured people.

Once this is received, you will need to transfer the information into a spreadsheet. You can get a copy of the template spreadsheet by clicking the **“Template”** button.

When the spreadsheet is open, you will first need to click the **“Enable Editing”** in Excel.

You will see two tabs on this spreadsheet, one where the member information is to be input and the other, a **Helpsheet** to assist with navigating the document and upload process.

You can now input the information into the columns. The first column should only be for the details of the employees. Their partners and children should be entered beside them under the **“partner”**, **“child1”** etc. columns.

The screenshot shows a web form titled "SCHEDULED OF INSURED PERSONS". It has a "TEMPLATE" button circled in red in the top right corner. The form is divided into two sections: "INDIVIDUALS" and "COUPLE/FAMILIES/SINGLE PARENT FAMILIES". Each section contains input fields for member name, policy type, member type, and date of birth (split into day, month, and year). There are also "ADD CHILD" buttons in the family section.

The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H	I	J	K	L
1	firstname	surname	policy type	date of birth	partner	partner-dob	child1	child1-dob	child2	child2-dob	child3	child3-dob
2	my name 1	Surname 1	i	14/09/1968								
3	my name 2	Surname 2	i	21/05/1980								
4	my name 3	Surname 3	f	01/01/1971	My partner 3	01/01/1972	my child 1	01/01/2001				
5	my name 4	Surname 4	i	01/02/1973								

The Excel window title is "My partner 3". The "Enable Editing" button in the top right of the Excel window is circled in red. The "people-col" tab at the bottom is also circled in red.

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## Policy Setup

### Step 7 **OPTION 2** Continued...: Using the Excel Spreadsheet

Note: Under “**policy type**” you will need to indicate whether this person is an individual (i) or part of a family/couple (f)

Once the spreadsheet is returned and checked, you will need to remove the “**Helpsheet**” tab at the bottom by right clicking it and selecting “**Delete**”. Then you can save this to your desktop ready to drag into the quoting system.

Once saved, close the document and return to the quote system. We cannot currently save quotes so you will need to use the email you sent to the client to regenerate the quote.

Once here you reach the screen where you can input the Insured’s details, select “**Import**” in the top right-hand corner. This will prompt a pop-up box which is where you will need to drag and drop your excel spreadsheet.

	A	B	C	D	E	F	G	H	I
1	firstname	surname	policy type	date of birth	partner	partner-dob	child1	child1-dob	child2
2	my name 1	Surname 1	i	14/09/1968					
3	my name 2	Surname 2	i	21/05/1980					
4	my name 3	Surname 3	f	01/01/1971	My partner 3	01/01/1972	my child 1	01/01/2001	
5	my name 4	Surname 4	i	01/02/1973					
6									
7									

**NEXT ▶**

**YOUR QUOTE: £725.16** (includes insurance premium tax) **MORE**

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## Policy Setup

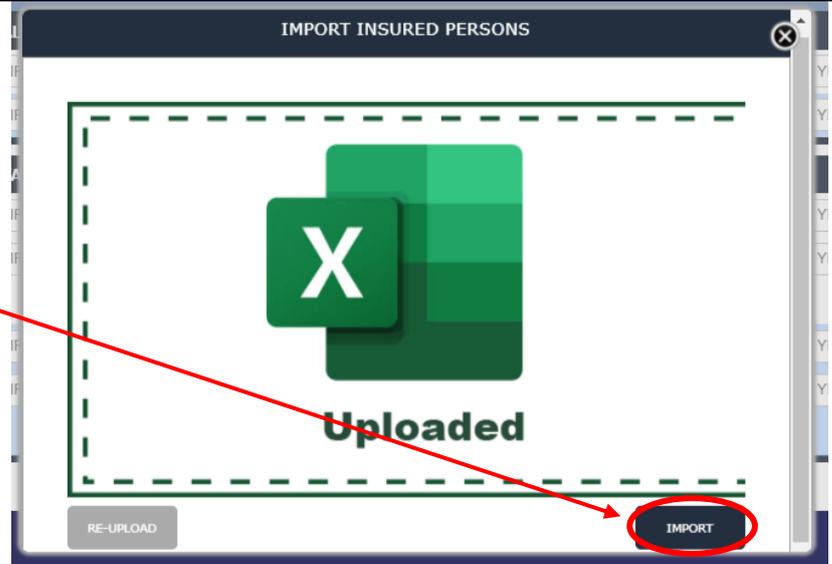
Once you have dropped your document on the tile, the screen should confirm it has been **“Uploaded”**

Next, click the **“Import”** button and the names and DOBs will be populated for you.

Check the details have copied over correctly and that the partners and children are with the correct employee.

We recommend that you save a copy of the excel spreadsheet to enable you to update this as required when processing the renewal quotation in future.

Click **Next** →



### Step 8 : Completion

Once all information has been input, you will see a summary of the cover being provided.

If you have account facilities, you can add the payment on to your account or you can take card details from your client's company.



ACCOUNT PAYMENT ►

CREDIT CARD PAYMENT ►

◀ PREVIOUS

YOUR QUOTE: £725.16 (includes insurance premium tax) [MORE](#)

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## Policy Setup



Once payment is confirmed you will be presented with the confirmation screen, confirming the policy number.

You will also see the documents available to download or email.