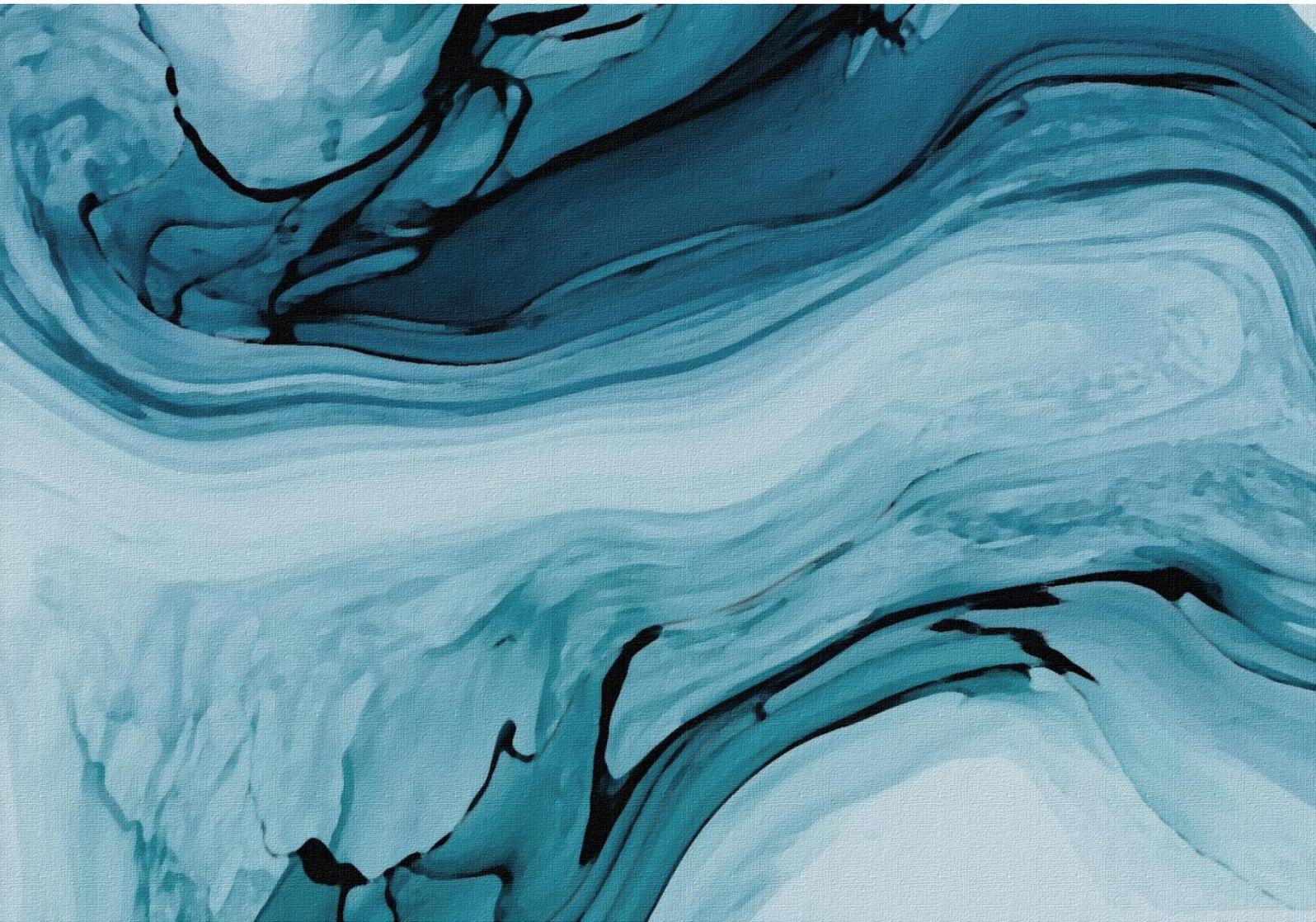


# HOW TO GUIDE

bspoke online.



# introduction.

Bspoke Online provides a streamlined trading experience allowing you to get instant quotes, manage and renew policies effortlessly, and access everything you need – all in one convenient place.

This guide has been created to assist you in navigating Bspoke Online, our full cycle policy management system developed with SchemeServe.

## creating an account.

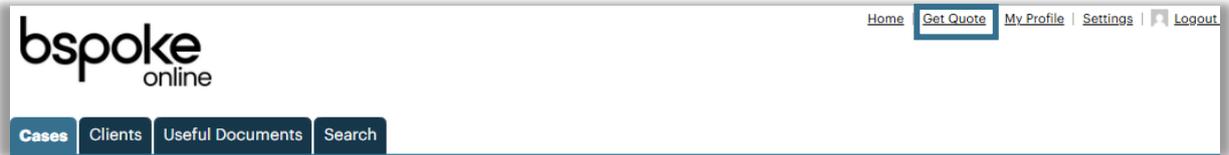
Visit the Bspoke Group website and click the 'Bspoke Online' button in the top right corner. Click the "Register" button and fill out the form to get started. Once you've submitted the online form, a member of our team will review your request. Once approved, you will receive an email to validate your email address. Once validated, you'll then receive an email to let you know your account has been activated.

Once registered you will need to log in with your username and password.

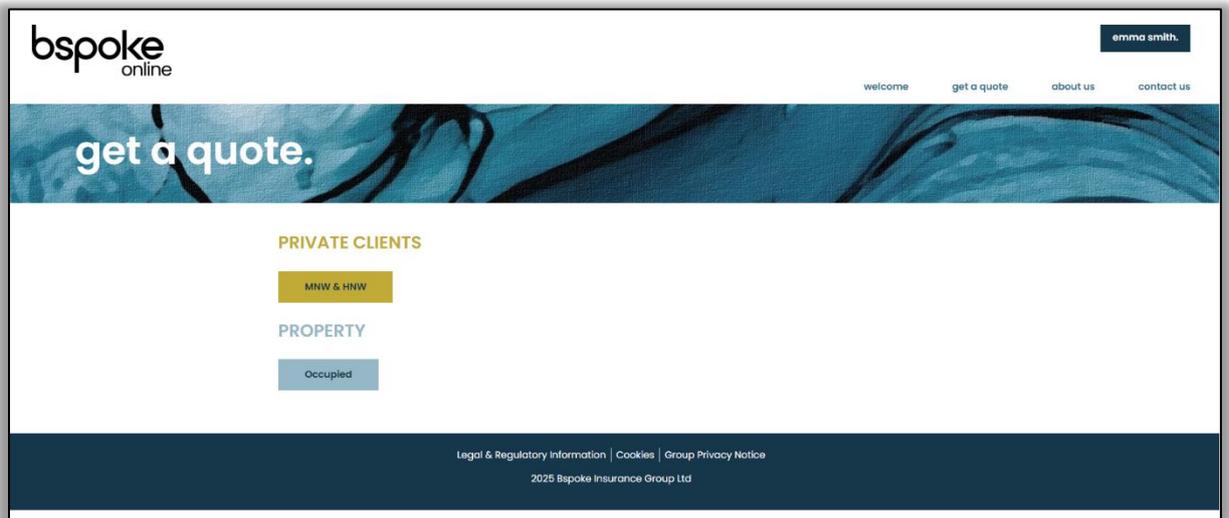
If you were to access the portal website and go straight to the site's 'Get Quote' page, you will always be asked to log in if you haven't already. If you do not have a log in, you will be able to create an account here. You will only be able to access Bspoke Online once you have completed all the required details, and our team have enabled your account.

# getting a quote.

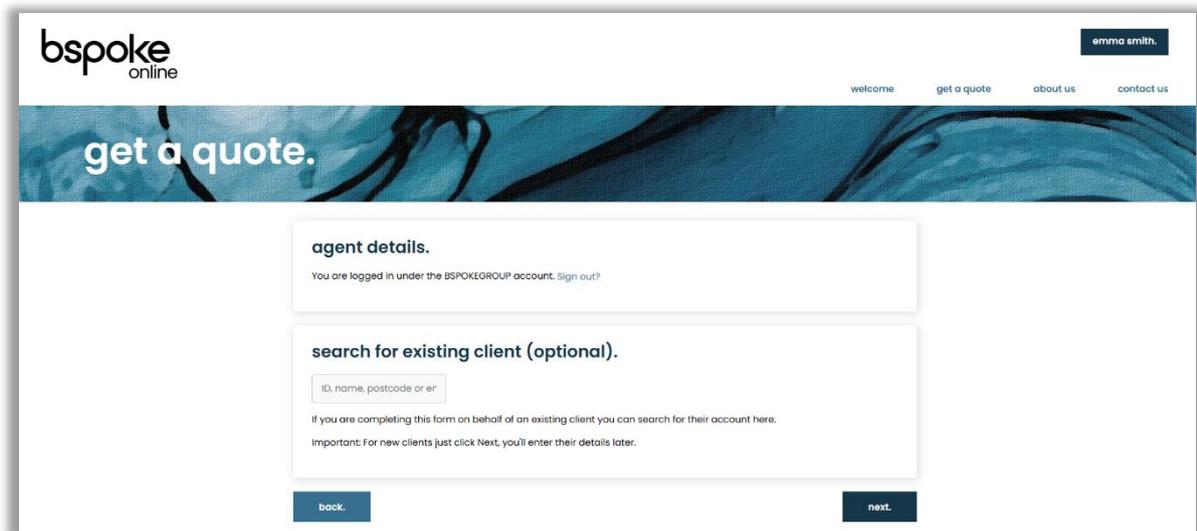
Once you've logged into Bspoke Online you'll see the 'Get Quote' option in the top right which will take you into the quote journey for whichever scheme you select.



Select the scheme you would like to get a quote for and click on 'Next'.



You will then be presented with this page where you are able to search for existing clients or click on 'Next' to enter a new quote:



You will then be presented with the risk questions.

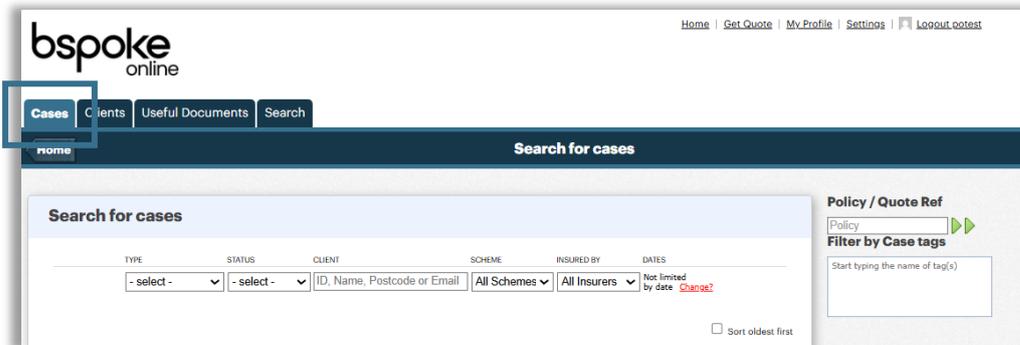
The screenshot displays the 'bspoke online' website interface for 'PROPERTY OWNERS - OCCUPIED'. At the top left is the logo 'bspoke online'. At the top right, there is a user profile 'emma smith.' and navigation links for 'welcome', 'get a quote', 'about us', and 'contact us'. A blue banner with the text 'get a quote.' is positioned below the navigation. The main content area is titled 'PROPERTY OWNERS - OCCUPIED' and features a vertical navigation menu on the left with the following steps: 1. Policyholder information (highlighted), 2. Material Facts, 3. Property Details, 4. Additional Cover, 5. Claims, and 6. Premium Adjustments. The main form area is titled 'Policyholder Information.' and contains the following fields: 'Insured Type' with a dropdown menu showing '- select -'; 'Correspondence Address' with a 'Postcode' field and a 'get address' button, followed by the text 'or Enter address manually'; and 'Domicile in the UK' with radio buttons for 'Yes' (selected) and 'No'.

When you get to the last page of the quote journey you can click on 'Finish' and this will then submit the details you have entered and produce a quote.

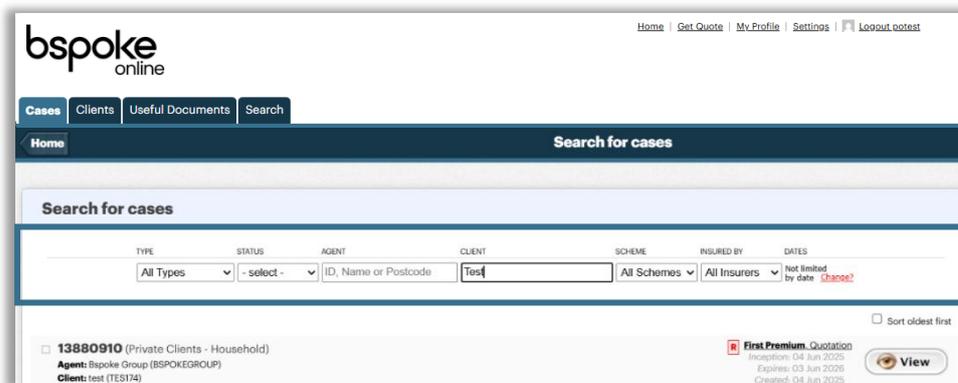
# accessing policies.

To find policies, click on your name in the top right corner so that you're seeing the account screen.

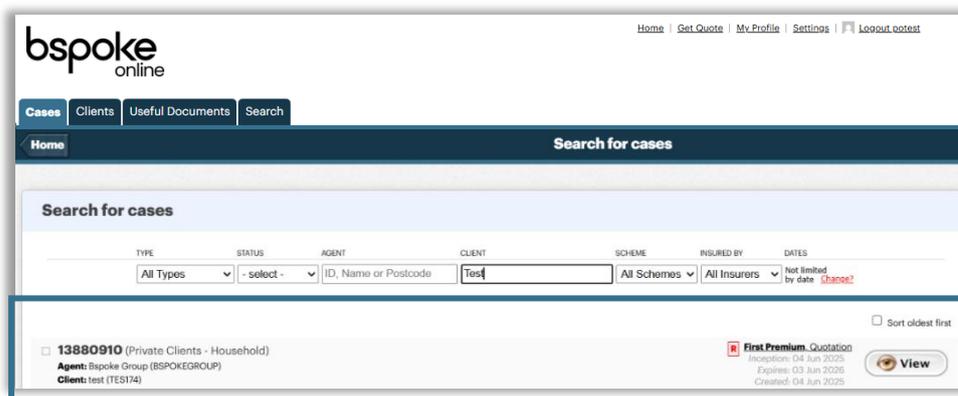
The first tab is the cases tab, this is where you will find all the policies for your brokerage.



From here you will be able to filter the policies by record type, status, agent, client, scheme as well as insurer. To find a policy quickly, you can enter a policy number in the top right. Once you've selected some filters, you will see a list of policies with a short summary including policy number, agent name, client name as well as if the policy has been referred or not.

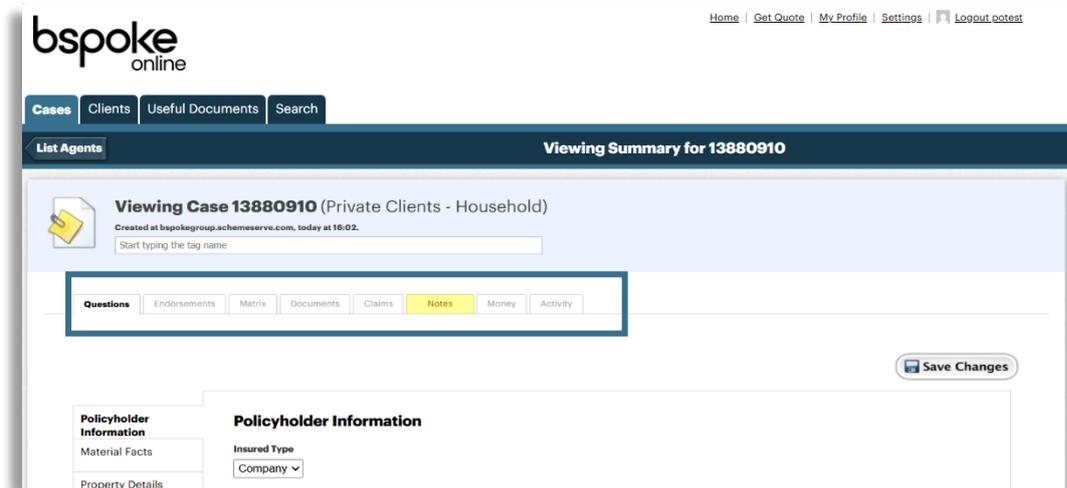


To enter a policy, select 'view' on the right-hand side.



# inside a policy.

Selecting 'View' takes you inside the specific policy where you will be presented with another row of tabs.

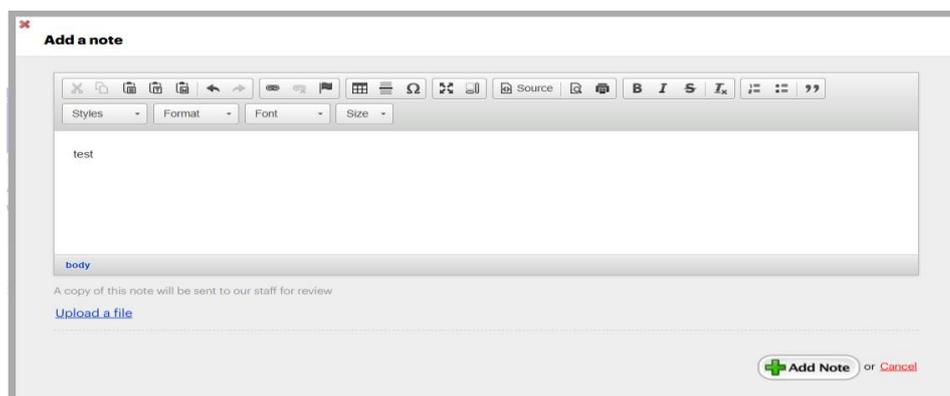


The first being a tab showing a **summary of questions** answered on the quote journey. You may also see some questions which were hidden on the quote journey.

**Documents** is the next tab where you will see any documents which have been automatically attached to this policy as well as the option to manually upload documents. More documents may be added here when the status on the right is changed. This status being changed is how documents are automatically generated.

Following that is the **claims** tab, claims can only be recorded once the policy is on cover.

You then have a **notes** tab which can act as a communication tool between you and the underwriter.



# statuses.

Heading across to the right to **'History'**. This is where you will see the different record types nested under one another and below that you will have the policy status. Here is where you can put a policy on cover, cancel it, or set it as NTU.

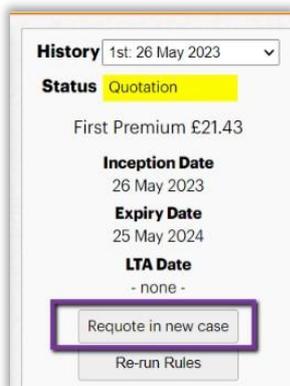
When a scheme is built, certain actions are set to trigger when a status is changed e.g. generate a document when a policy is put on cover.

You will be able to put a policy on cover. If the policy has been referred, you will need to wait until the referral has been cleared by our underwriters before you can put it on cover.

You will be able to see the amount outstanding as shown below.



You will have the ability to 'Requote in new case' which will create a new policy but carry across the current policies data. This will have all the questions pre-populated with the answers from the quote you are re-quoting.



# mta's & renewals.

When a policy is placed on cover, you will have the option to do an MTA and when appropriate the ability to do a renewal. The renewal button will appear 45 days before the renewal is due. The number of days depends on how the scheme has been set up.

For an MTA, select adjust policy and follow the quote journey.



The journey for an MTA or Renewal is slightly different on the quote journey as it is already populated with the most recent record's data. All you'll be required to do is make any necessary changes. Once you are happy with everything click finish and head back into the policy admin area or complete the payment.

\*Note - you can only do one adjustment per day.

A renewal works in the same fashion, a renewal button will appear within 45 days before expiry. The renewal works in the same way by following the quote journey, hitting finish and heading back to the policy view or completing the payment.

# contact us.

We're always happy to help.

Whether you have a question about a risk or need help using the portal, our teams are on hand to assist you.

## Policy Enquiries



Call us on 0113 345 1768



Email us at:

Bspoke Commercial | [brokerenquiries@bspokecommercial.co.uk](mailto:brokerenquiries@bspokecommercial.co.uk)

Bspoke Private Clients | [enquiries@bspokeprivateclients.co.uk](mailto:enquiries@bspokeprivateclients.co.uk)

Bspoke Property Owners | [enquiries@bspokepropertyowners.co.uk](mailto:enquiries@bspokepropertyowners.co.uk)

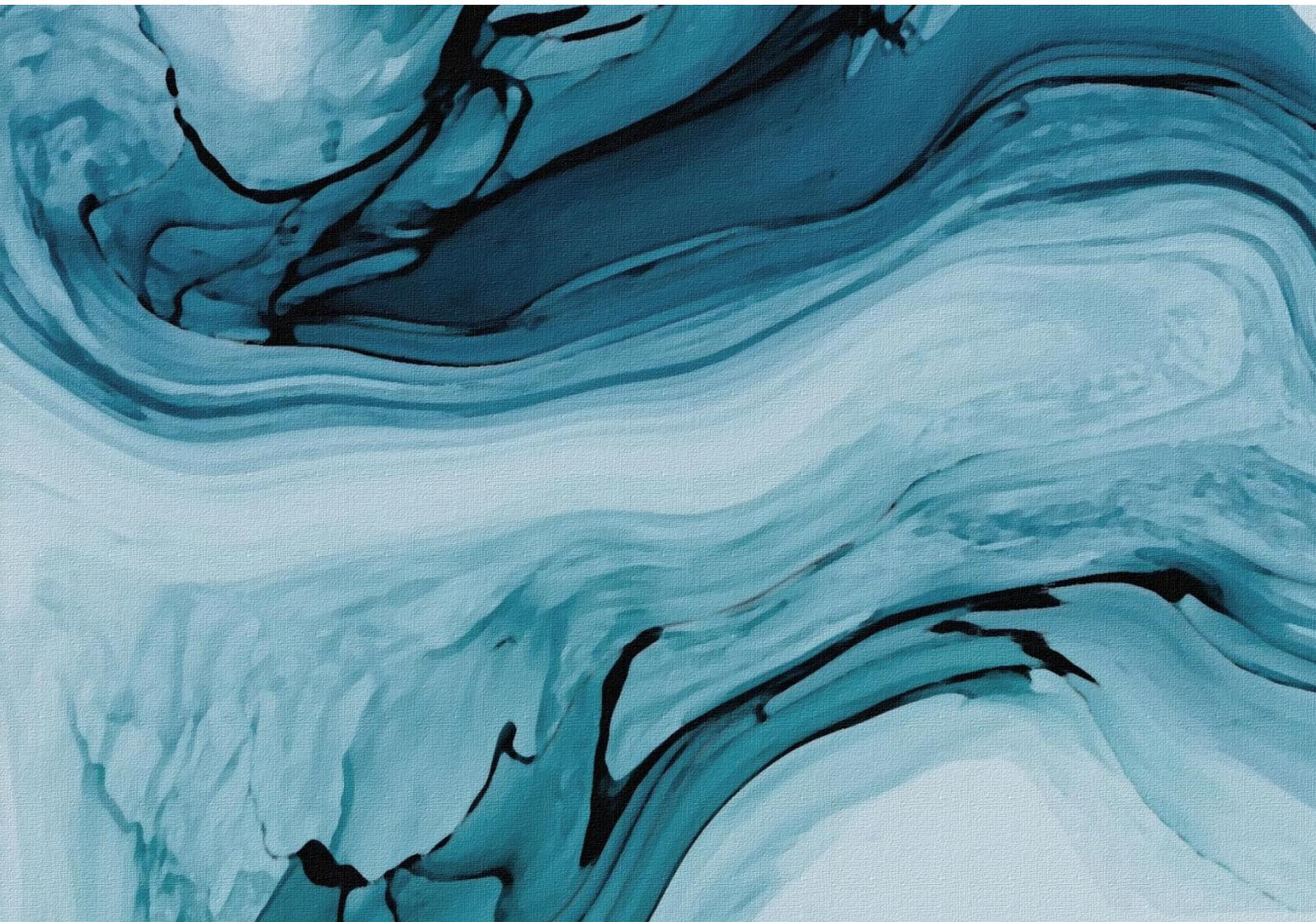
Bspoke Sports & Leisure | [enquiries@bspokesportsleisure.co.uk](mailto:enquiries@bspokesportsleisure.co.uk)

## General Enquiries

To make a complaint please email us at [complaints@bspokecommercial.co.uk](mailto:complaints@bspokecommercial.co.uk)

If you have a query about your agency, please email us at [agency@bspokegroup.co.uk](mailto:agency@bspokegroup.co.uk)

For all other enquiries email us at [sayhello@bspokegroup.co.uk](mailto:sayhello@bspokegroup.co.uk)



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The following companies are part of the Bspoke Group:

Bspoke Commercial Ltd. Registered in England & Wales. Company Number 09284678. Registered Office: Brookfield Court, Selby Rd, Leeds LS25 1NB. Authorised by the Financial Conduct Authority. FRN: 709456  
Bspoke Sports & Leisure, Bspoke Private Clients and Bspoke Property Owners are trading names of Bspoke Commercial Ltd. Registered in England & Wales. Company Number 09284678. Authorised by the Financial Conduct Authority. FRN: 709456