Extranet User Guide

Version 3

premier guarantee

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Welcome to the Extranet

Why use the Extranet?

The Extranet has been developed to improve our customer service and transparency by enabling users to see the status of any quotes or orders at the touch of a button. You can also see if there are any outstanding issues (conditions) which may delay the issue of final certificates. The ability to apply online speeds up the quoting process with faster turnaround times for any documentation submitted via the Extranet.

It is advised that you review the frequently asked questions before you begin using the site for the first time as these should help with any queries you may have. If you require extra support or encounter any technical issues, simply click the help link in the top right corner and complete the form describing your issue and we will get back to you as soon as possible.

What can I do via the Extranet?

At a glance, the Extranet will enable you to:

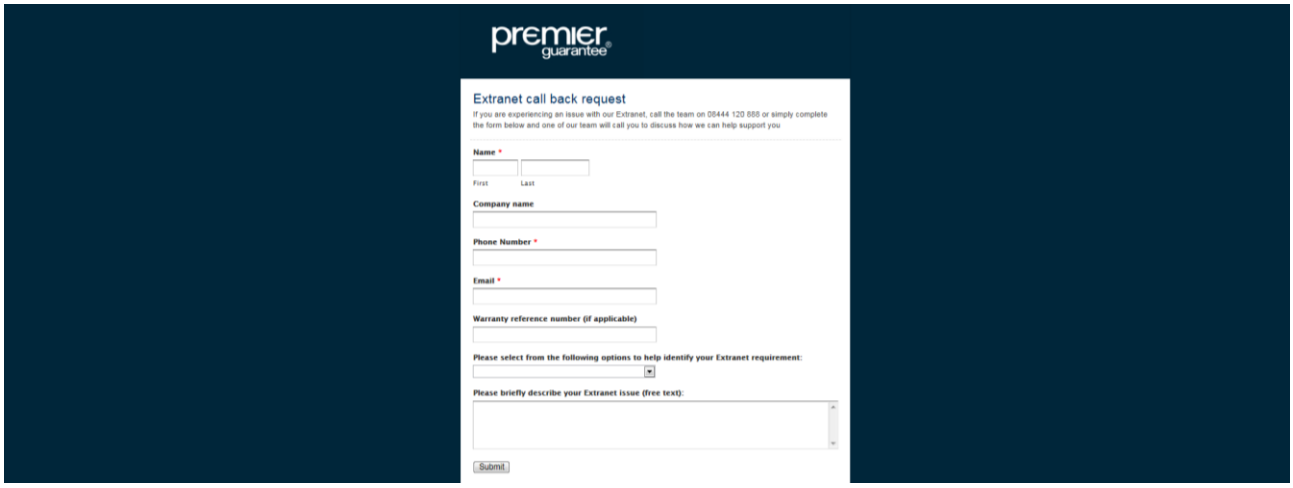
- Create a quote indication
- Convert an indication in to a formal quote application
- Complete and submit the quote application form
- View the formal quote document pdf
- View any orders you have with Premier Guarantee
- View the company and contact information we hold on you
- Upload or download relevant documentation if available
- View any outstanding conditions on a site or plot by plot basis
- Update your own contact information
- View the status of your company registration with Premier Guarantee

If you are a company administrator you will also be able to:

- Set other company administrators
- Add new employees
- Add a new office
- Activate / deactivate Extranet users from company employees registered with Premier Guarantee

Give us your feedback

If you encounter any issues or errors whilst using the Extranet, please click the Help link in the top right hand section of the Extranet and complete and submit the form to help us identify and rectify the issue. You can also download the Extranet User Guide from the home page.



Getting Started

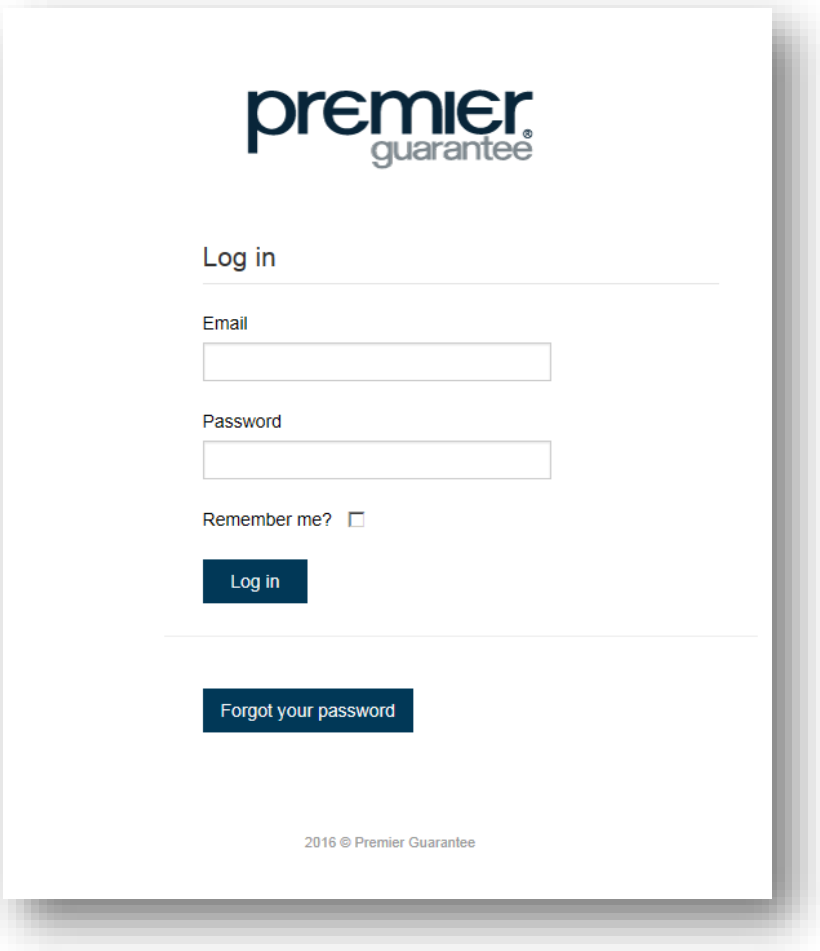
How to access the Extranet

Use the link on www.premierguarantee.co.uk home page or go to https://extranet.premierguarantee.co.uk

Please ensure the internet browser you are using is Internet Explorer Version 9 (IE9) or above, Chrome, Firefox or Safari. You will also need to ensure that any pop ups are enabled.

To access the Extranet you will need to set up your login and password by clicking the link in the email which will be sent to you. Your password must contain a minimum of 8 characters and at least one digit, one lowercase letter, one uppercase letter and a special symbol from one of the following characters only (@#$%!*). You can change your password any time via My Account, Change Password link or the Forgot Password link. Please note that this email link expires after 24 hours so if you experience any issues, please email extranet@premierguarantee.co.uk

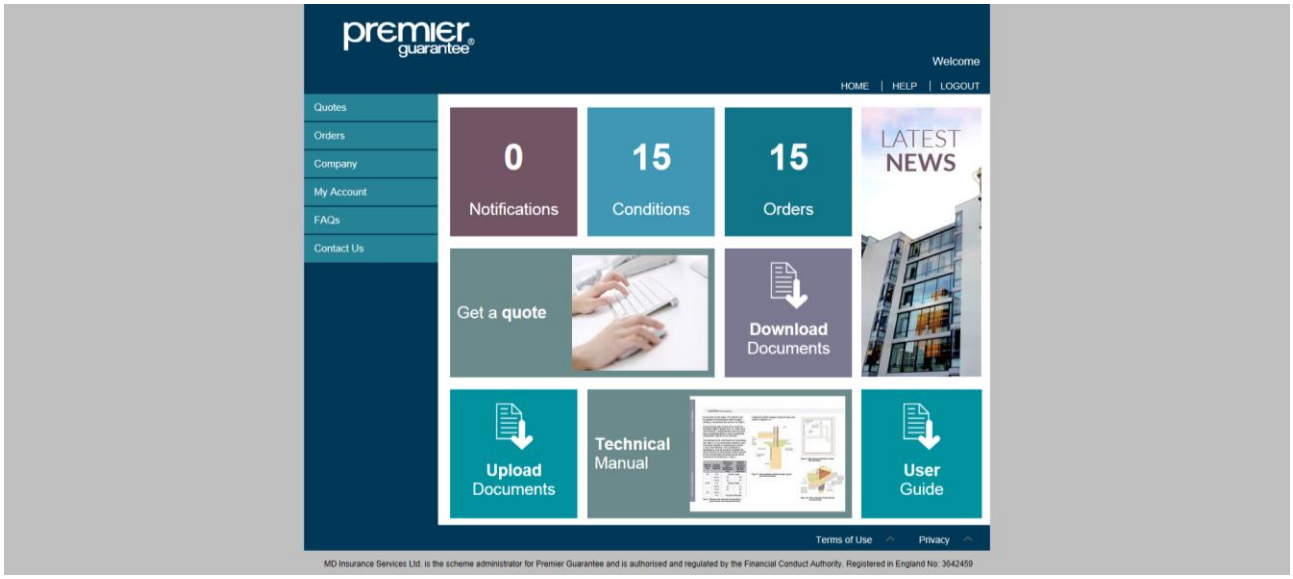
You will only be able to view quotes and orders where you are the Premier Guarantee customer e.g. requesting and paying for the quote. Third parties such as contractors, social housing associations will not currently have access to the Extranet unless you wish to add them as a company employee. For more information, please email extranet@premierguarantee.co.uk



Finding your way around

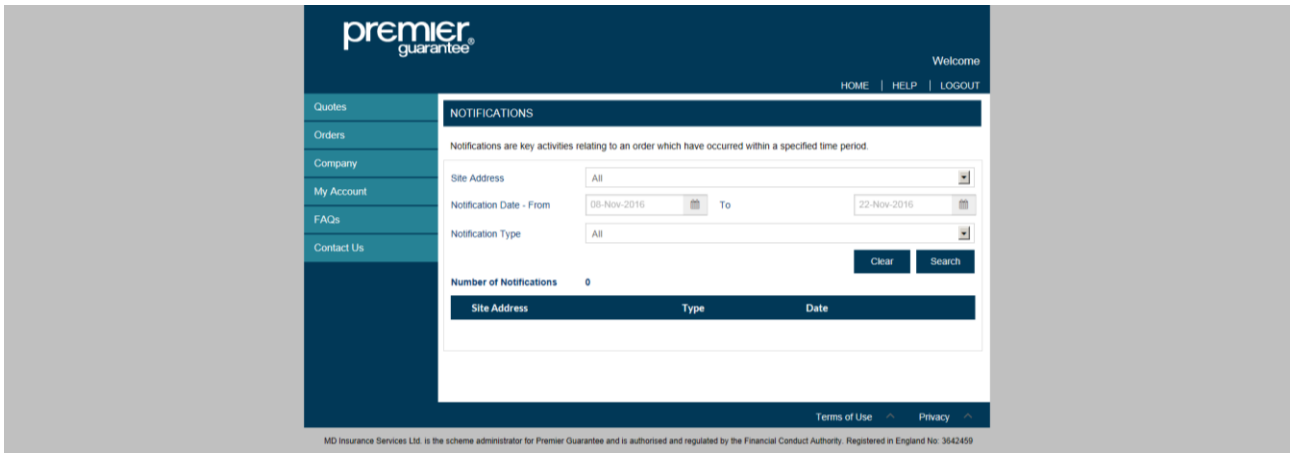
The Home Page

The home page gives you quick access to all the main areas of the Extranet. You can get back to this page by clicking the Home button on the top right of the main screen or the Premier guarantee logo.



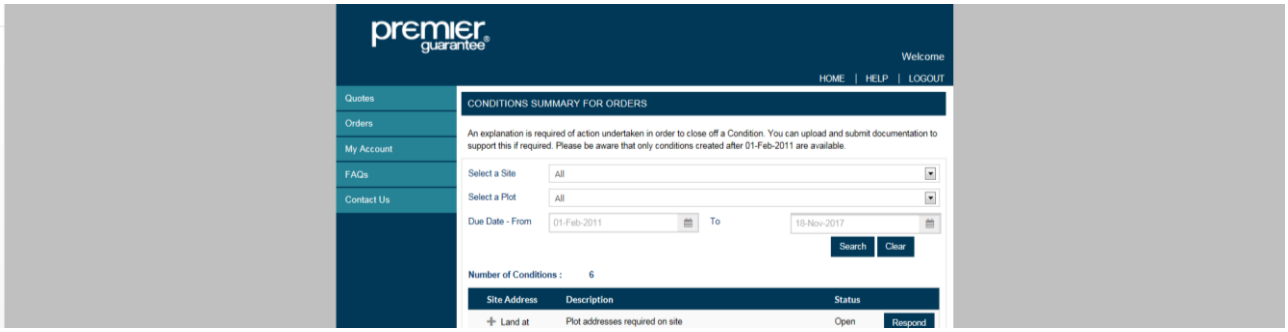
Notifications Quick Link

The Notifications section shows key activities occurring on a site e.g. issue of a certificate, endorsement etc. within the last 2 weeks. Please note that you can manually change the date.

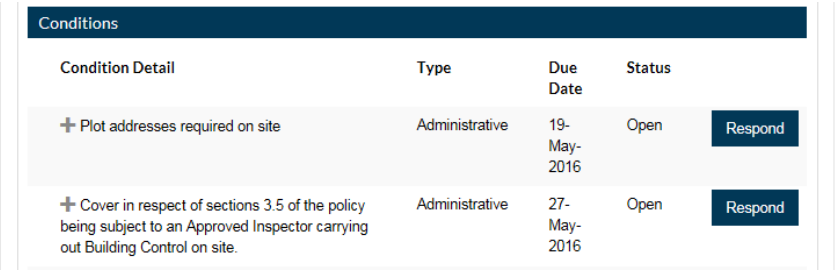


Conditions Quick Link

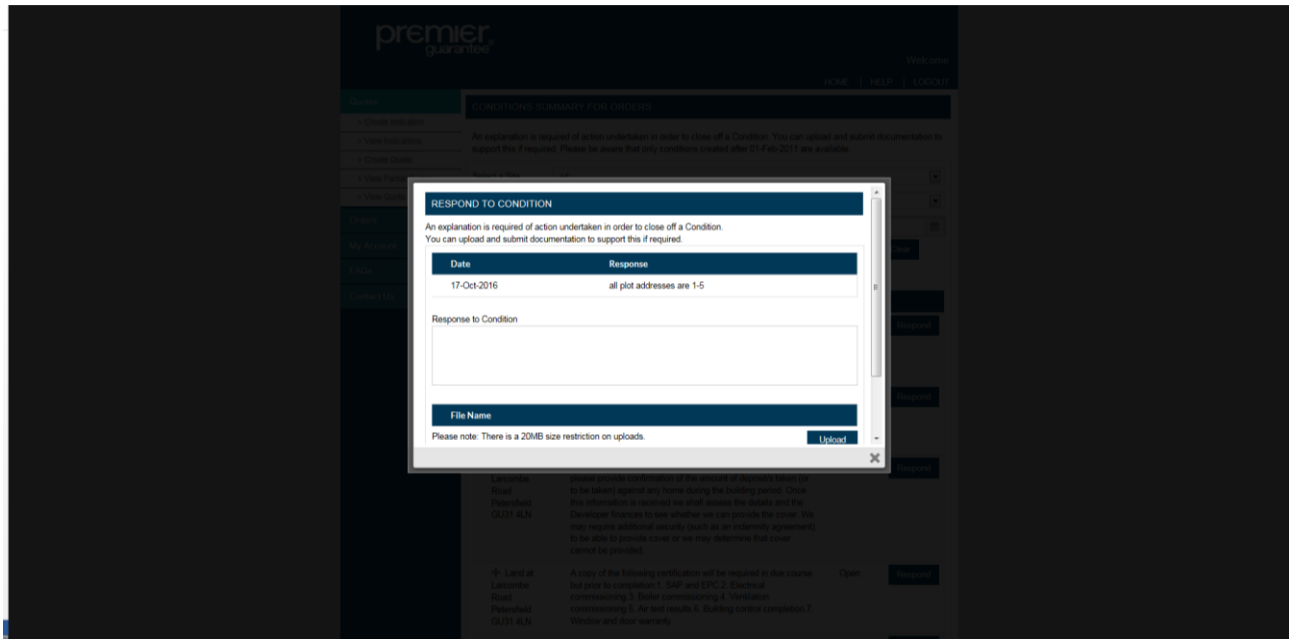
The Conditions section shows you any conditions that need to be completed at a site level.



To close off a condition, simply click the Respond link next to the Condition.



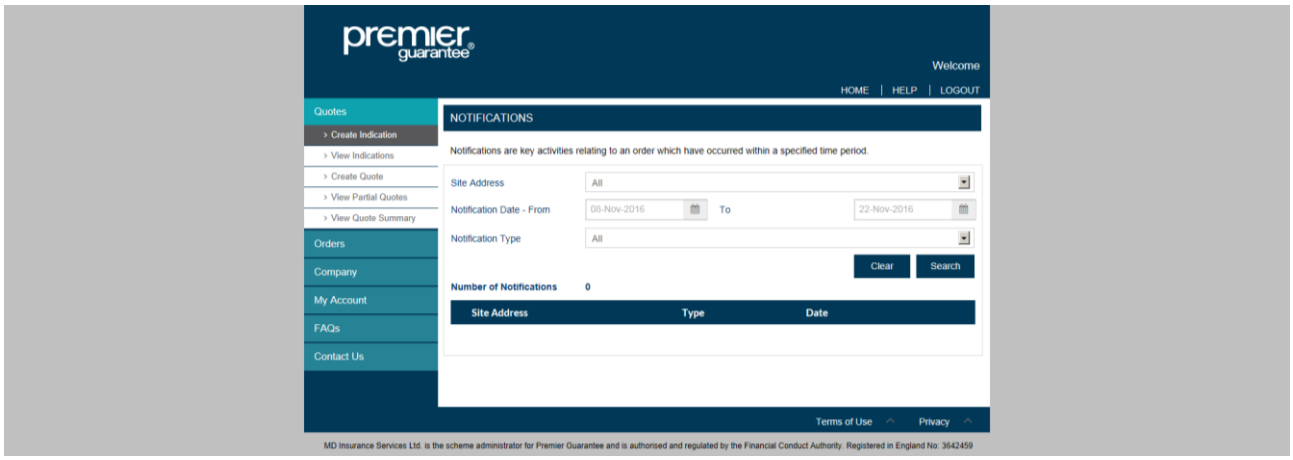
You will be prompted to provide a note of what action has been undertaken to support the closure of the condition and be able to upload any supporting information as required. Please note that this does not automatically close off the condition. The information submitted to Premier Guarantee will be reviewed by the relevant team and closed within 24 hours, providing the information satisfies the requirements. You will be notified if we are unable to close of the condition and reasons provided.



Quotes

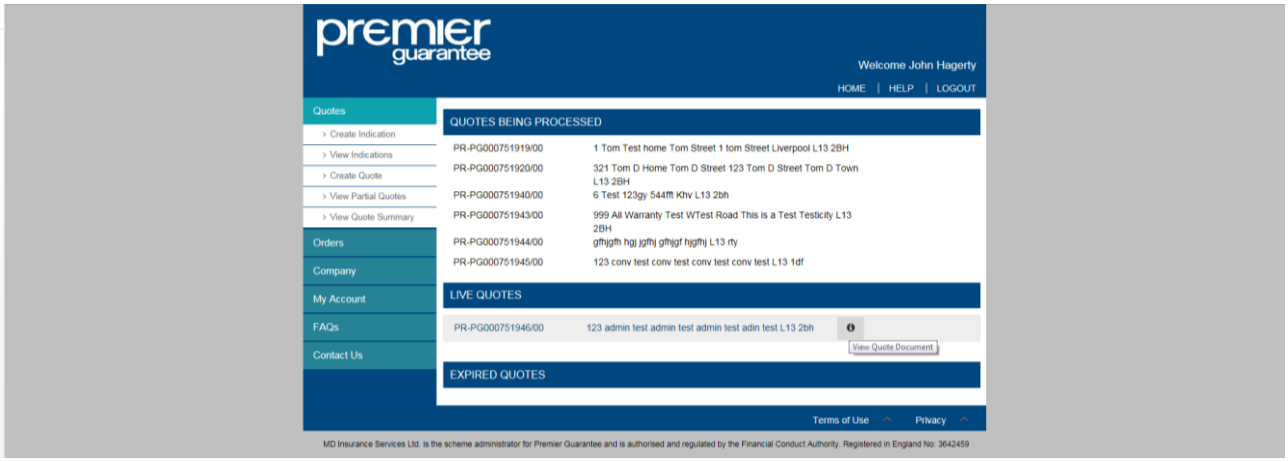
This section allows you to complete the following:

- Produce, save and amend an instant non-binding indication for your site
- Convert an indication into an on-line quote application for submission
- Complete and save part-complete quote application form for submission
- View a live quote by clicking the icon next to the quote

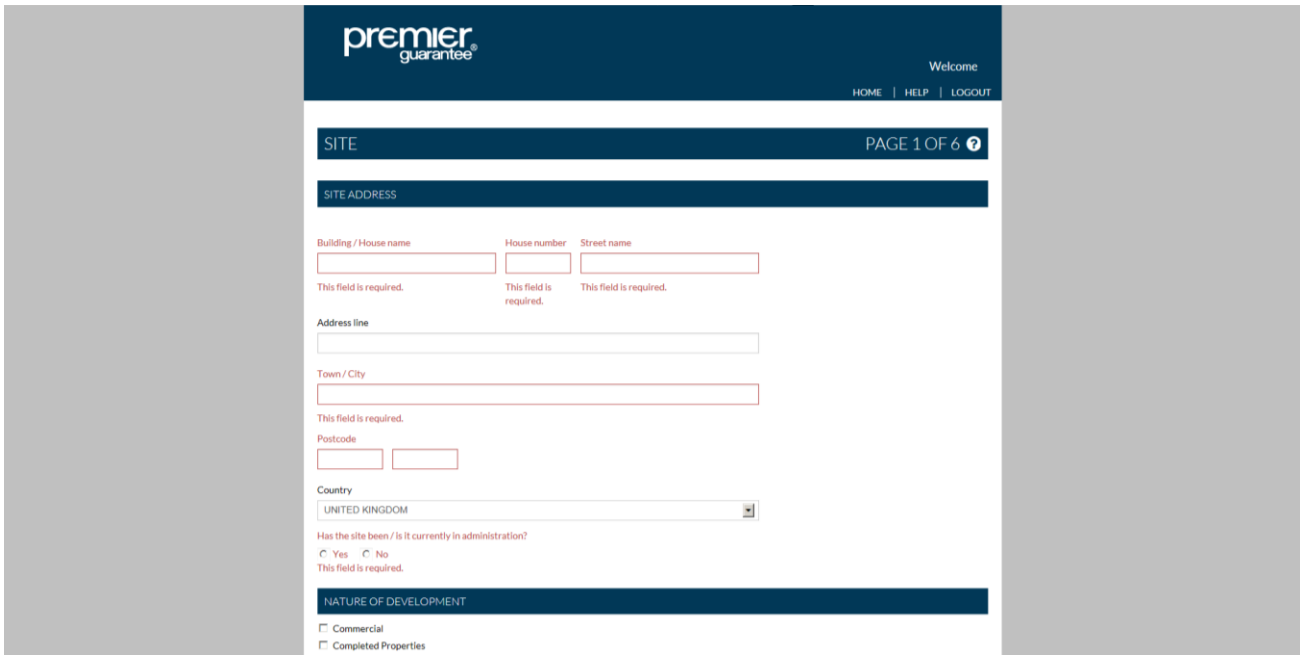


Please note that once submitted to Premier Guarantee, your quote application will be formally underwritten and emailed to you within 3 working days provided all the information provided is correct. You will be contacted directly if further information is required.

The View Quote Summary link enables you to view any quotations submitted for underwriting and these will be shown under Processing. Quotes which have been issued and not yet accepted will be shown as Live. Any live quotes which are older than 90 days will be shown under Expired.

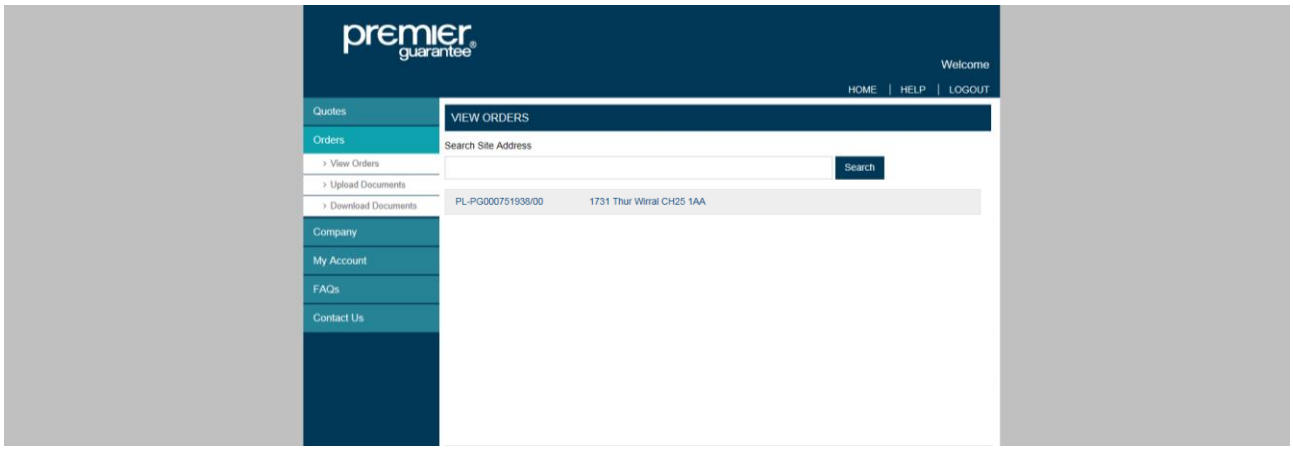


You can save the formal quotation form at any point once the mandatory questions on page 1 have been completed by clicking the Save button. Please note that the site times out after 20 minutes and you will be unable to save any further information. If this happens, please log out and back in again.

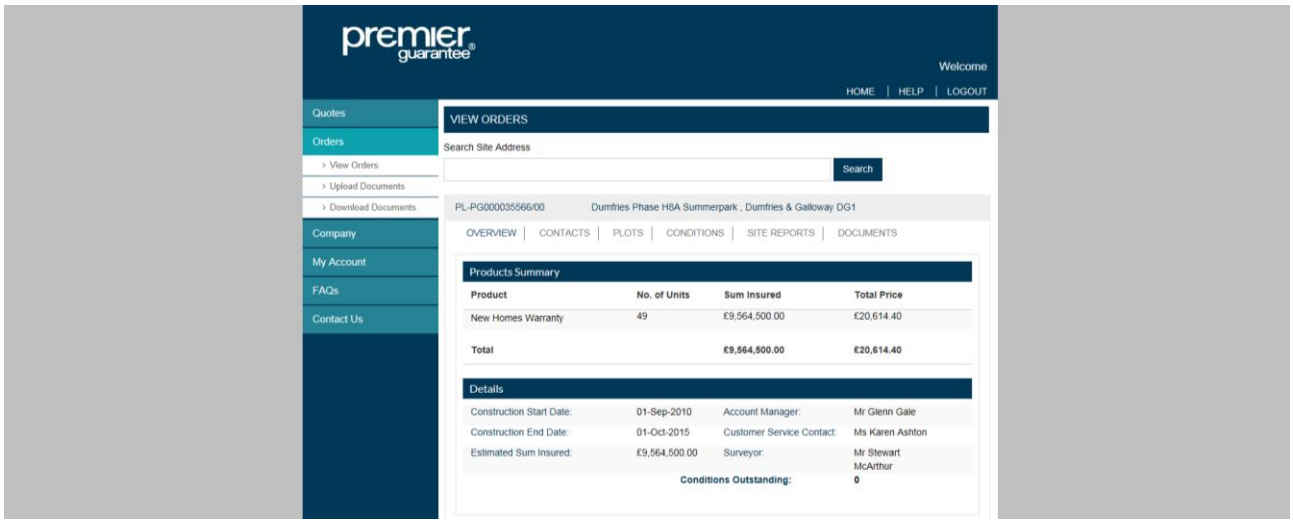


Orders / Orders Quick Link

This section allows you to view any formal orders / sites you have registered with Premier Guarantee.



The information is displayed under a number of subheadings to enable you to quickly find what you require.



Overview: Provides a product summary of your order including number of units, sums insured and total cost.

Contacts: This shows all contacts and contact information linked to the site order for both your company and Premier Guarantee. These cannot be updated via the Extranet as may affect the issuing of insurance documentation. Please email any contact change requests to customerservices@premierguarantee.co.uk

Plots: Allows you to search and view information relating to individual plots relating to the site. Click view to see the individual plot information available. To make any changes to this please email customerservices@premierguarantee.co.uk

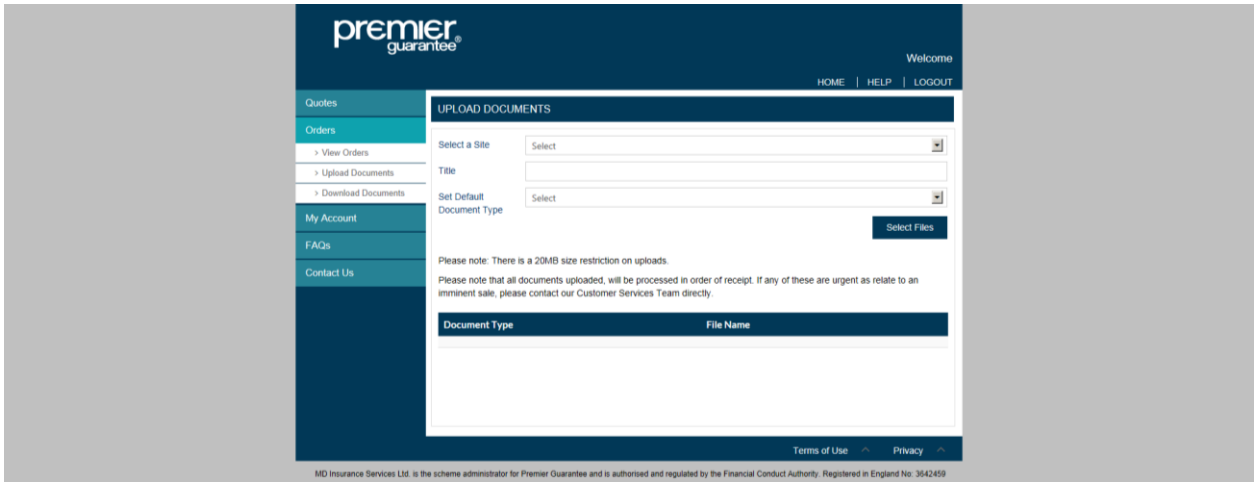
Conditions: Shows you all or allows you to filter outstanding conditions linked to a site. These can be administrative, technical or financial. To close of a condition, simply click the Respond link next to the Condition.

Site Reports: Allows you to view or search for any site reports related to the site or a particular plot.

Documents: You can open any documentation relating to your site or a plot that we have issued by clicking the view button next to the relevant document. **Please note that only documents issued after 1.9.2015 will be available.**

Upload Documents Quick Link

This enables you to upload a document against a site or a plot.



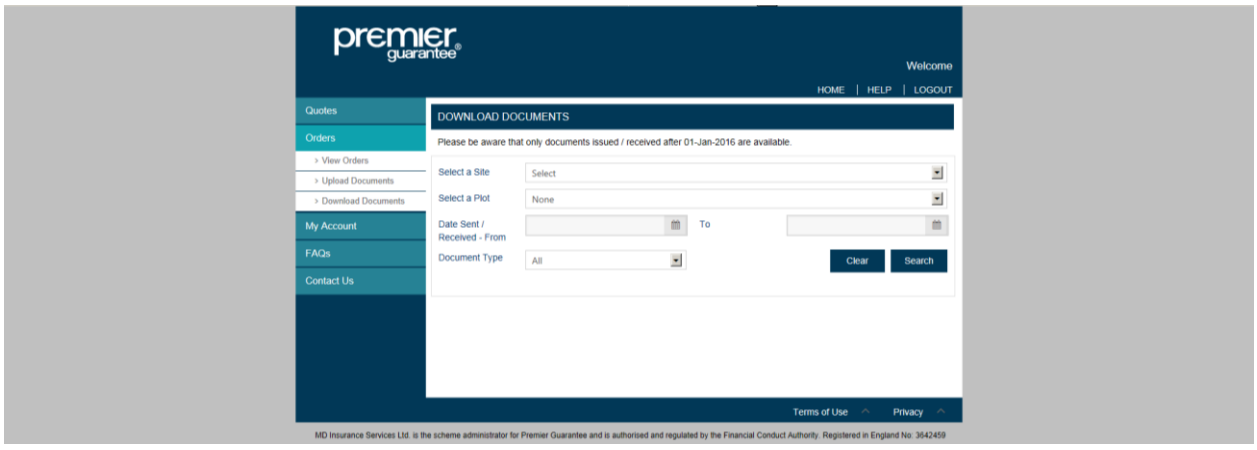
You must select a document type form the drop down list which best relefects the nature of the document you are uploading.

We are able to accept the following document file types and please note that the file size limit is 20Mb for any 1 document or bundle of documents:

1. MS Office File types –
   a. Word (.Doc / .DocX)
   b. Excel (.Xls / .XlsX / .CSV)
   c. Outlook (.Msg)
   d. Powerpoint (.ppt / .pptX)
2. Adobe (.pdf)
3. Image files (.JPEG / .PNG)
4. AutoCad (.DWG)

Download Documents Quick Link

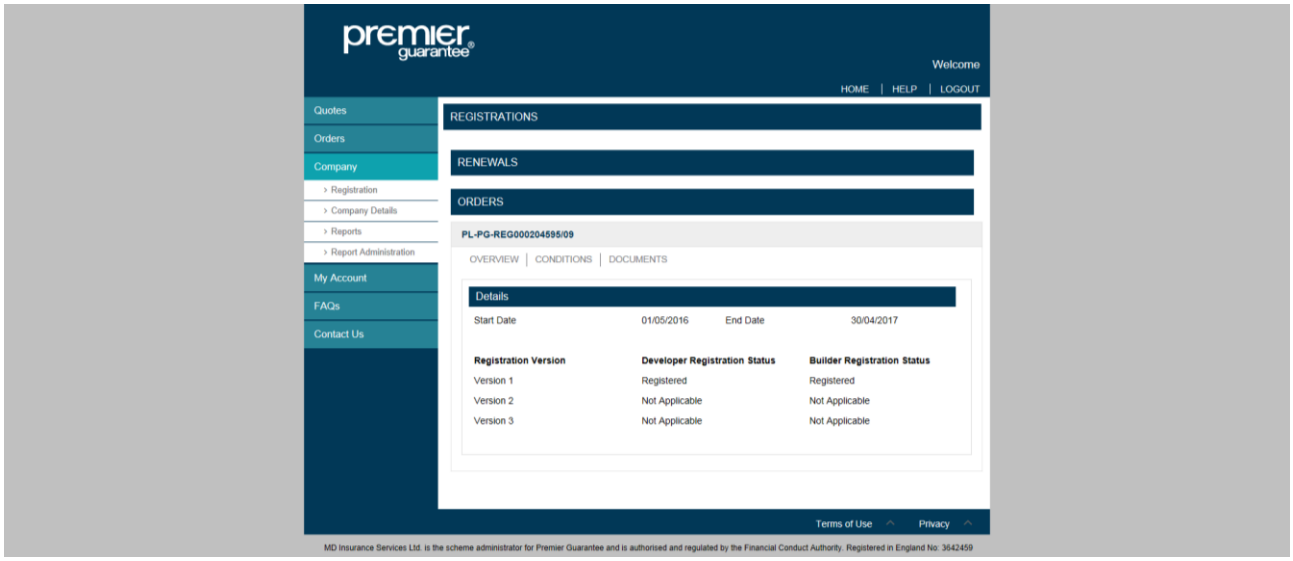
This allows you to quickly search for a particular document relating to a site or plot using the search function and whether the document was sent or received by your company. The document type section enables you to select the document type that you wish to download e.g. Policy document.



Company

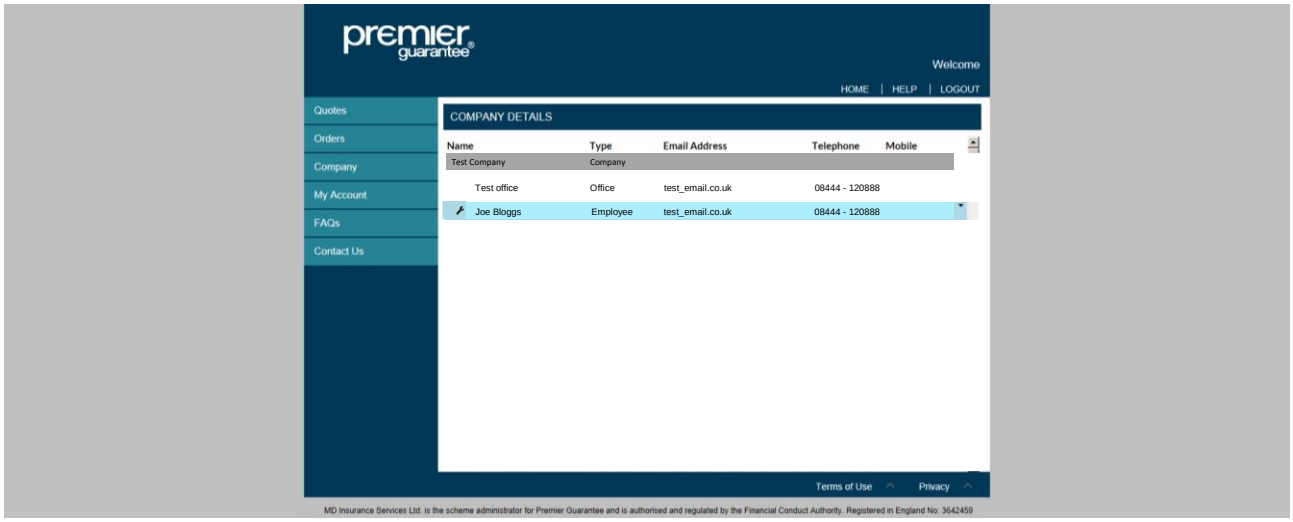
Registration

This section shows your latest company registration / renewal information and the company details we hold on you.



Company Details

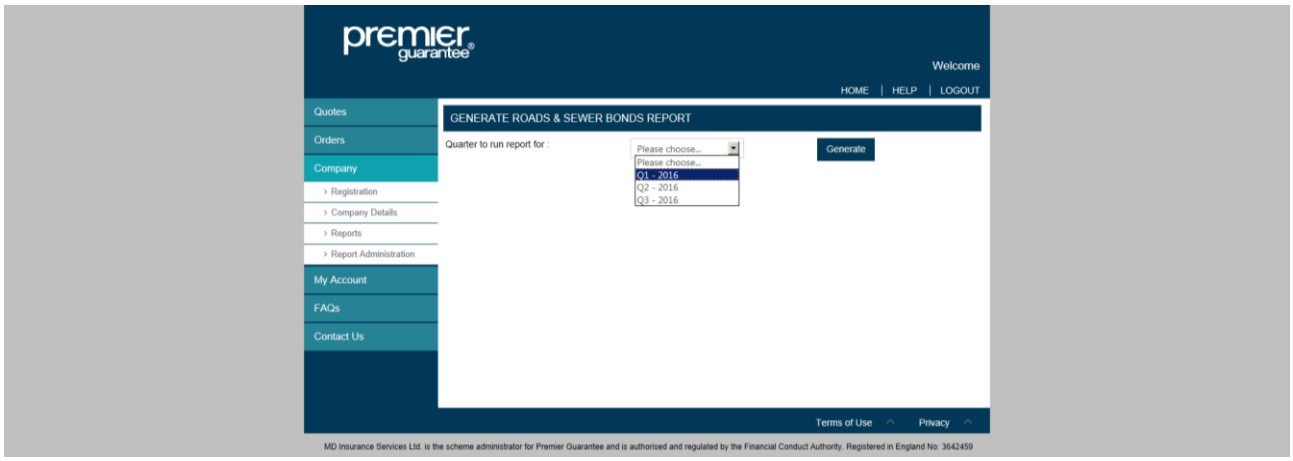
Please note that only the Company Extranet Administrator is able to add new offices or employees. The Extranet Administrator is marked with a spanner icon. See Extranet Administrator section for more details.If any of your company or employee information is incorrect or needs deleting, please email customerservices@premierguarantee.co.uk



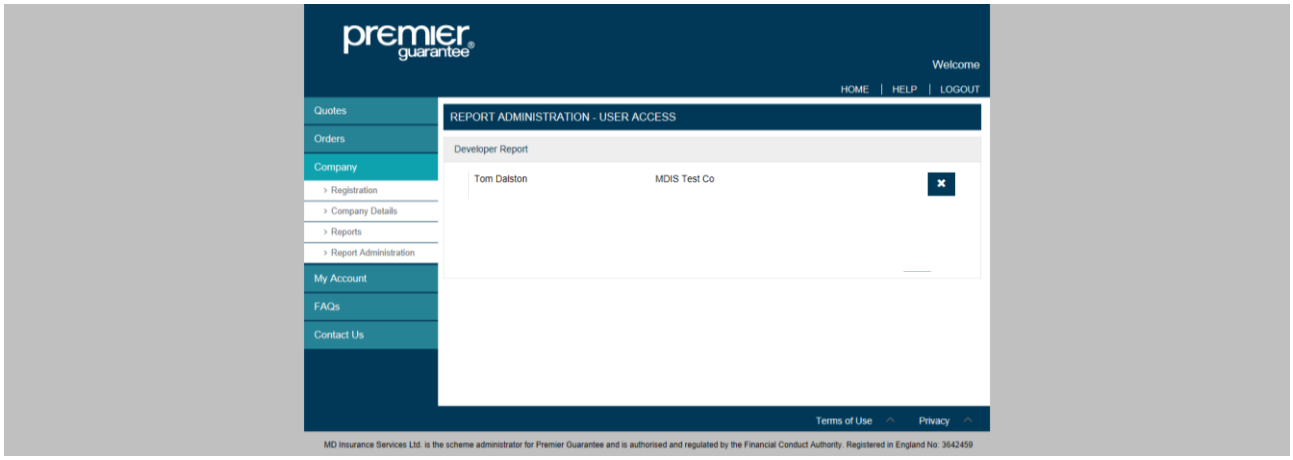
Reports

Any reports available to your company (e.g. if you have any Road and Sewer bonds) can be downloaded here. Simply choose the relevent quarterly reporting period and click generate. You will see the following notification and your report will be sent to your email address:

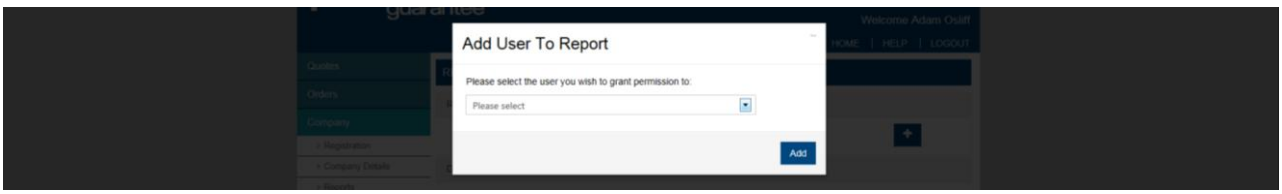
Your report request has been submitted and will emailed to you shortly. If you have not received the report after 5 minutes please generate it again.



The Extranet Adminstrator will also be able to view an additional tab called ‘Report Administration’. This enables the Extranet Adminstrator to set which employees are able to request any reports.



To set user access, simply select the report required and click the ‘+’ button. This will open up a new window and you can select the relevant name from the drop down list.



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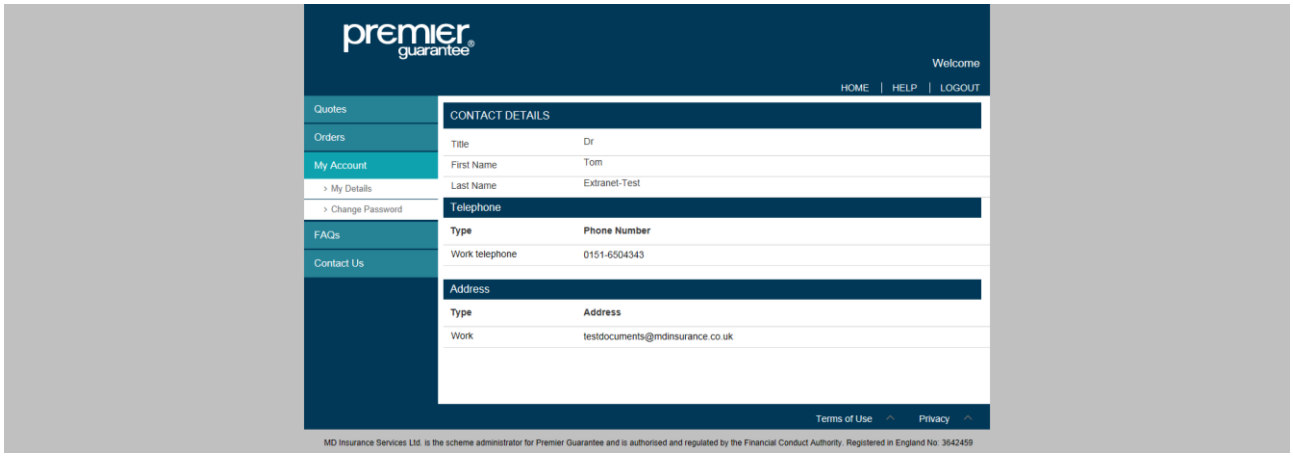
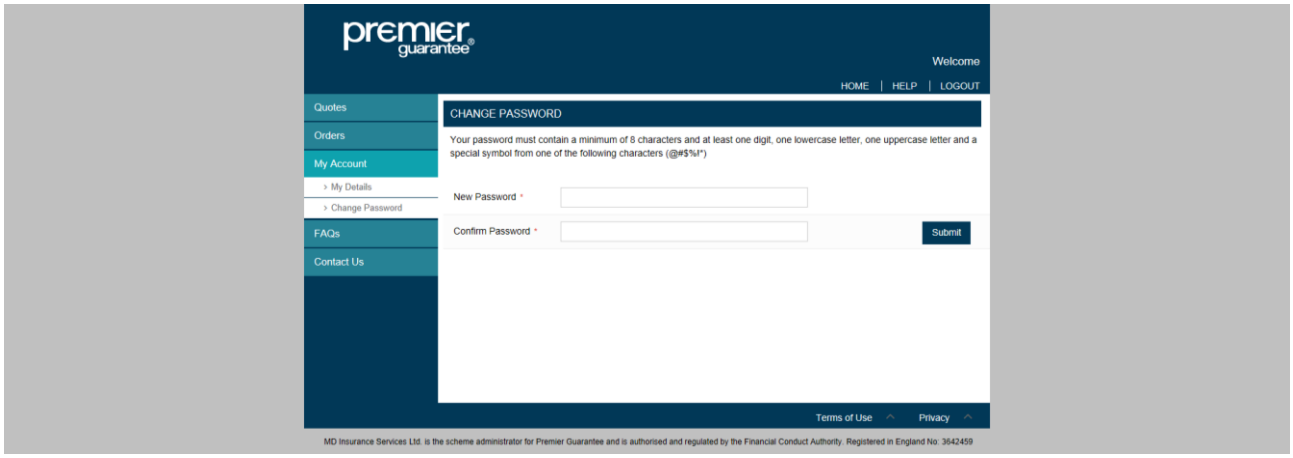
My Account

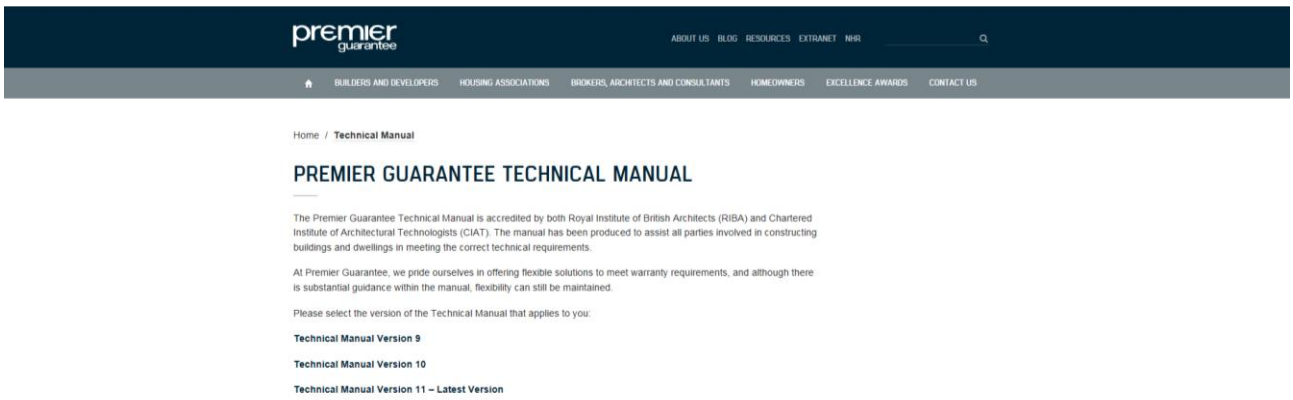
This section displays the information we hold on the Extranet User and enables to user to change their password. This can be updated on the Company Details tab.





Technical Manual

This quick link gives you access to the on-line version of the Premier guarantee Technical manual. If you are unsure which version applies to a particular site, please refer to your certificate of insurance. If this has not yet been issued, please speak to our customer services team who will be able to help.

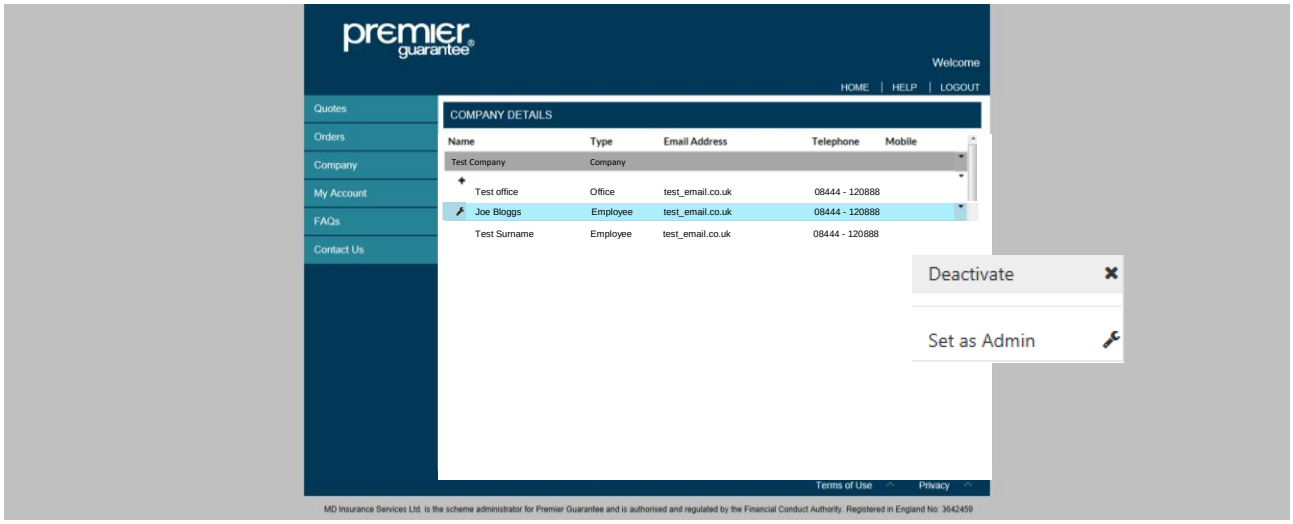


Extranet Company Administrators

Extranet Company Administrators have additional user permissions to enable the following actions:

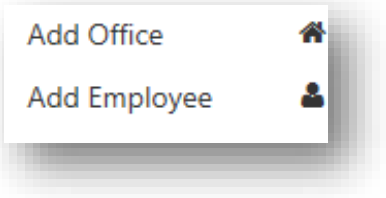
- Set up a new office or new company employee
- Approve / remove Extranet access for an employee
- Provide reporting access for Extranet users
- Set up additional Extranet Administrators

This can all be done via the Company link. Company Extranet Administrators click the arrow at the end of the company of employee row and select from the drop down options which include 'Sign up for Extranet' and 'Deactivate' and 'Set as Admin'. The spanner icon indicates who is selected as the Company Extranet Administrator. Detailed instructions are available in the FAQs section. **If any of your company or employee information is incorrect or needs deleting, please email customerservices@premierguarantee.co.uk**

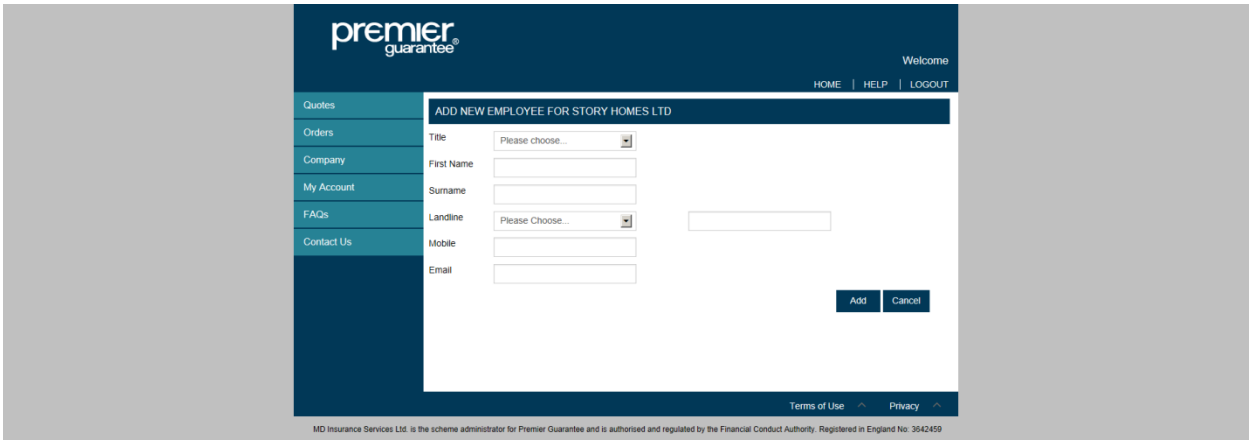


Adding a New Company or Employee

To add a new Company, click the arrow at the end of the Company row which will be in grey at the top of the page. An option box will appear and you need to select Add Office.



To add an employee, select the arrow at the end of the office row which will open up a new screen to input the new employee details.



Frequently Asked Questions

General Questions about using the Extranet for the first time

I have forgotten my password
If you have forgotten your password simply go on to the Extranet login page and click the Forgotten your password link. You will be prompted to type in your email address and press submit. This will generate an email to your in-box. If you have not received this email within 24 hours, please ensure you check your spam filters.

Can I change my password?
Yes you are able to update your password and personal details within the Extranet by selecting the My Account link and Change Password option where you will be promoted to type in your new password.

How do I find out who my company Extranet Administrator is?
To find out whom your company Extranet Administrator is, select the Company link then Company Details. The contact which has a spanner icon next to it is your Extranet Administrator. Alternatively, contact us for details.

How does an Extranet Administrator set up a new employee or office?
To set up a new company employee, select the Company link then Company Details. Click the arrow at the end of the company information and select Create Office or Create Employee. Complete the information required and click Add.

Can I set up more than one Extranet Administrator?
Yes, if an employee is registered on our system then they can be added as an Extranet Administrator. Only a current Extranet Administrator has permission to do this.

How to remove a company employee?
You are unable to manually remove / delete an employee from the Extranet. To do this, please call 0151 650 4343. Alternatively email customerservices@premierguarantee.co.uk

The site is not working on phone, iPad / desktop etc.
If you are unable to access the Extranet, please ensure the internet browser you are using is Internet Explorer version 9 (IE9) or above, Chrome, Firefox or Safari. You will also need to ensure that any pop ups are enabled. If you are still experiencing issues, please email extranet@premierguarantee.co.uk or call 0151 650 4343 and select the Extranet option.

My company details are incorrect
You are unable to manually remove / delete company details via the Extranet. To do this, please call 0151 650 4343. Alternatively email customerservices@premierguarantee.co.uk

What does the Notifications page show?
The Notifications page will show key activities occurring on a site e.g. issue of a certificate, endorsement etc. within the last 2 weeks.

What does the Conditions page show?
The Conditions page will show you any conditions that need to be completed at a site level.

Indication / Quotation Related Questions

I need help in understanding what the indication/quotation fields mean
Each field has notes to explain the information required. For further explanation, please call 0151 650 4343 and select the Extranet option, followed by the Pre-Quote option and the team will be able to talk you through. Alternatively email extranet@premierguarantee.co.uk

Can I view or convert indications on the Extranet?
Yes. You are able to view any indications that you have created via the Extranet that have not been converted to a quote. To view your indications, simply select My Quote and then View indications. Indications can be converted in to a formal quotation by selecting the Convert to Quote button. This opens up the Create Quote wizard which requires you to complete the additional information required for a formal quotation before submitting.

Can I save or change the information on the quotation request form?
You are able to save or change the information within the quotation application form once the mandatory questions in section 1 have been completed. Following this, you can press the Save button at any point (and return to that same point) before submitting to Premier Guarantee. Once saved, you are able to view and edit the form as required.

If you wish to amend a quotation, the information will remain pre-populated for you to review before submission for a new indication or quotation.

For further explanation, please call 0151 650 4343 and select the Extranet option, followed by the Pre-Quote option and the team will be able to talk you through. Alternatively email extranet@premierguarantee.co.uk

I am having problems saving my quotation request form?
You are able to save a quotation request at any point once the mandatory questions in section 1 have been completed. Simply click the save button at the bottom of the form.

I am having technical difficulties in completing the indication/quotation request form?
For technical difficulties, please call 0151 650 4343 and select the Extranet option. Alternatively email extranet@premierguarantee.co.uk

I need to discuss the indication/quotation provided.
For any queries related to indications or quotations please call 0151 650 4343.

Can I accept a quotation via the Extranet?
No. You will need to sign and return the quote acceptance to us. This can uploaded via the Extranet.

How can I respond to Quote Conditions via the Extranet?
The Extranet enables you to view and / or respond to one / many open conditions associated with a particular quote. In order to do this, click on the My Quote link. Select View Quotes. Click on Conditions. This will then display a list of all open conditions associated with the quote currently selected. You are then able to update text or upload a file by clicking on the Respond button.

When will I get my Quotation?
Providing you have submitted all the information required for underwriting, your formal quotation will be available within 3 working days if we have received all the relevant information. A member of our team will contact you if further information is needed. You will be sent your formal quotation via email.

Site Related Questions (Post Order)

I have submitted a document to close a condition but the condition is still open
Any documents submitted via the Extranet will be reviewed and conditions closed within 48 hours.

I think my technical conditions are incorrect?
If any of the technical conditions shown on the Extranet are incorrect, please contact your Warranty Surveyor. Contact details for your surveyor can be found by selecting the relevant site. This can be done by selecting Sites then View Sites. Select the site in question and click on the Contacts tab. Select Warranty Surveyor from the list of contacts and this will provide all the contact information required.

I think my administration conditions are incorrect or Plot information is inaccurate?
If any of the administration conditions shown on the Extranet are incorrect, please call 0151 650 4343. Alternatively email customerservices@premierguarantee.co.uk and include your site reference number.

The financial information showing for a site is incorrect
If any site information contained within the Extranet is incorrect, please call 0151 650 4343. Alternatively email customerservices@premierguarantee.co.uk and include your site reference number.

I would like to discuss or book a site inspection
To discuss a site inspection or to book an inspection, please call your Warranty Surveyor. Contact details for your surveyor can be found by selecting the relevant site. This can be done by selecting Sites then View Sites. Select the site in question and click on the Contacts tab. Select Warranty Surveyor from the list of contacts and this will provide all the contact information required.

What information can I view about Plots?
For each site order, you are able to search and view the list of plots existing on your sites. You can search by plot name or plot address.

My site details are incorrect
If any site information contained within the Extranet is incorrect, please call 0151 650 4343. Alternatively email customerservices@premierguarantee.co.uk and include your site reference number.

I cannot find a site / documents / plots
Each section of the Extranet has a search or filter option. If any of the information that you require to view on the Extranet is missing or appears incomplete, please check that any search or filter options are cleared.

Can I view conditions against a site, plot or company?
Yes, you are able to view the details of any open conditions and respond on a particular condition by adding a comment or uploading a document. The search filter is based on site, plot, due date and condition status.

Can I view a Site Inspection?
Yes, you can review the inspections currently associated with each site. The search filter based on inspected date, surveyor and status e.g. pending or completed. For completed sites you can review the report generated for that inspection by clicking the View button.

I want to discuss site/condition/report
To discuss any information relating to an existing site, please call your Warranty Surveyor. Contact details for your surveyor can be found by selecting the relevant site. This can be done by selecting Sites then View Sites. Select the site in question and click on the Contacts tab. Select Warranty Surveyor from the list of contacts and this will provide all the contact information required.

Can I amend an order on the Extranet e.g. add a new development phase?
The ‘My Sites’ link enables you to view all sites that you are associated to. Should you need to make any changes to an order, please call 0151 650 4343. Alternatively email customerservices@premierguarantee.co.uk and include your site reference number.

Annual Registration Related Questions

What does annual registration mean?
The Annual Registration link displays the current registration order details and its expiry details. Towards the end of the expiration it will automatically display the renewal quotation details for the upcoming year.

The term period for the registration is one year. After completion of one year, the policy needs to be renewed. Approximately 60 days before the policy is about to expire, you will receive an alert reminding you that your registration will expire. If a registration expires without renewal, Premier Guarantee will be unable to issue any further certification on units not yet signed off.

I have other questions regarding annual registration
For any queries relating to annual registration, please call 0151 650 4343.

Uploading Documents Related Questions

How do I upload documents?
Documents can be uploaded against a site and also against specific conditions. To Upload a document, Click on the My Sites link from the menu on the left-hand side of the page. Click on 'Upload Document' menu and enter description for the uploaded documents.

Choose the file to be uploaded. Select the Site, Plot or Condition from the list being displayed (the user can upload the document for individual plot or site or condition).

Finally, click on 'Upload' button.

I cannot upload Documents
Please note that the file size limit is 20Mb for any 1 document or bundle of documents and trying to load larger documents will create an error. If you experience any issues, please email a screen shot to extranet@premierguarantee.co.uk

Have you received the documents I have submitted via the Extranet or unable to view a document on the Extranet?
Please note that it will take up to 48 hours for your documentation to be validated. You will receive an Extranet notification when this has been processed. Alternatively, please call 0151 650 4343 or email customerservices@premierguarantee.co.uk and include your site reference number.

Can I view historic orders?
Only orders placed after 1st January 2016 can be viewed on the Extranet.

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