

## **Extranet User Guide**

#### **Extranet**

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# **Getting Started**

01.



#### **Extranet**

#### **Features and benefits of the Premier Guarantee Extranet:**

- New intelligent online quote application form
- Download/upload Plot Matrix and faster quote turnaround times
- Issue your own certificates if available
- Download technical summary to share with any relevant third parties
- Input plot addresses and final sale prices
- View, search and respond to any actions which may block Certificates of Insurance from being issued
- Plot level summary of actions outstanding or documents issued
- Respond to actions, upload any documentation required against them and view progress
- Short cut links to filter any urgent actions related to plots due to complete to help you prioritise
- Download all outstanding technical and non-technical actions in Excel format to share with any third parties
- View, add or update any individual office (except registered office) or employee details and grant Extranet access
- View technical documents submitted to us and policy related information issued to you
- View sites relating to multiple Special Purpose Vehicles (SPV) under one Extranet account
- View outstanding payment information to ensure there are no nasty surprises at the end of the process

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

- Set other company administrators
- Add new employees and offices
- Activate/deactivate Extranet users from company employees registered with Premier Guarantee.

For best performance, please use Chrome or Edge to ensure that any pop-ups are enabled. Contact us for any training support.



#### **Getting Started**



#### Welcome to the Extranet

To access the Extranet, click the link on the Premier Guarantee website www.premierguarantee.com

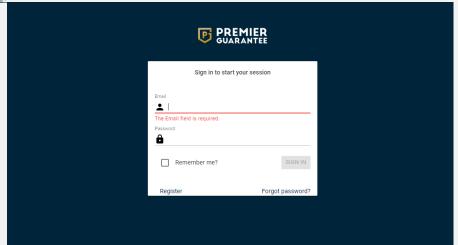
Alternatively, save the following URL into your internet browser favourites list:

#### https://extranet.premierguarantee.co.uk

If you have not received an email granting you access to the Extranet then click the **Register** link on the log in screen and complete and submit the form as requested.

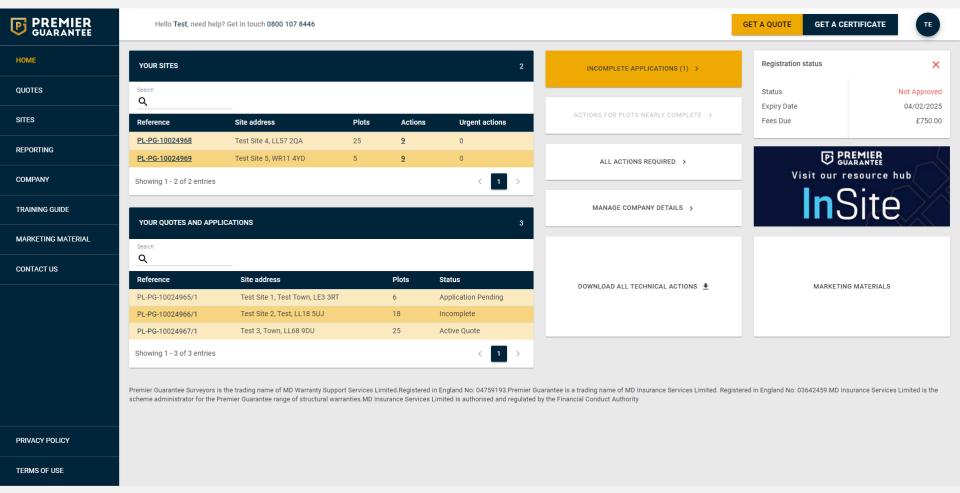
You will receive an email asking you to click and validate your Extranet access. This will take you through to a new screen enabling you to set up your password.

Once this is done, if you have forgotten your password, simply go on to the Extranet login page and click the **Forgot password** link. Enter your email address and click the **Reset my password** button. This will send an email to your inbox for you to click and reset your password. If you have not received this email, please ensure you check your spam filters. Please note that this link will expire within 24 hours.





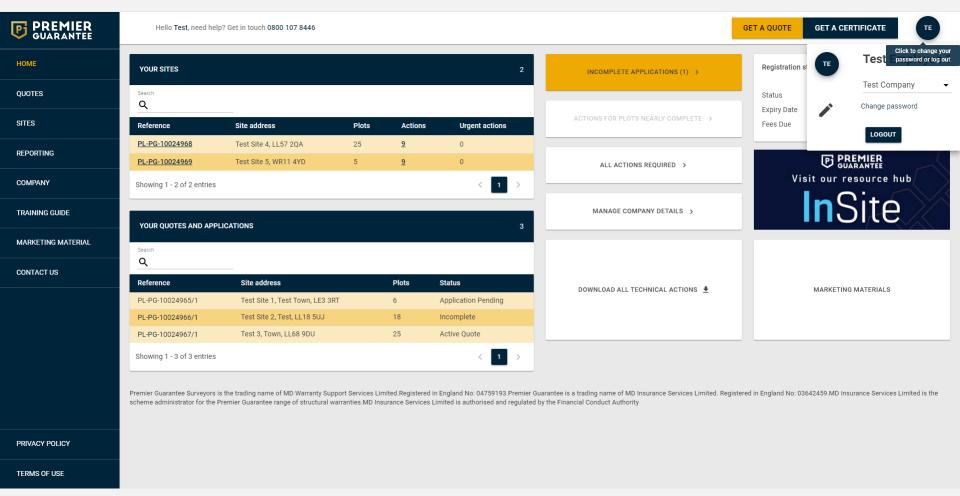
#### **Home: Quick Access**



The Extranet **Home** page provides short cut links to all the **Quotes**, **Sites** or **Company** related information you may require. You are also able to access this information via the tabs down the left hand side of the screen.



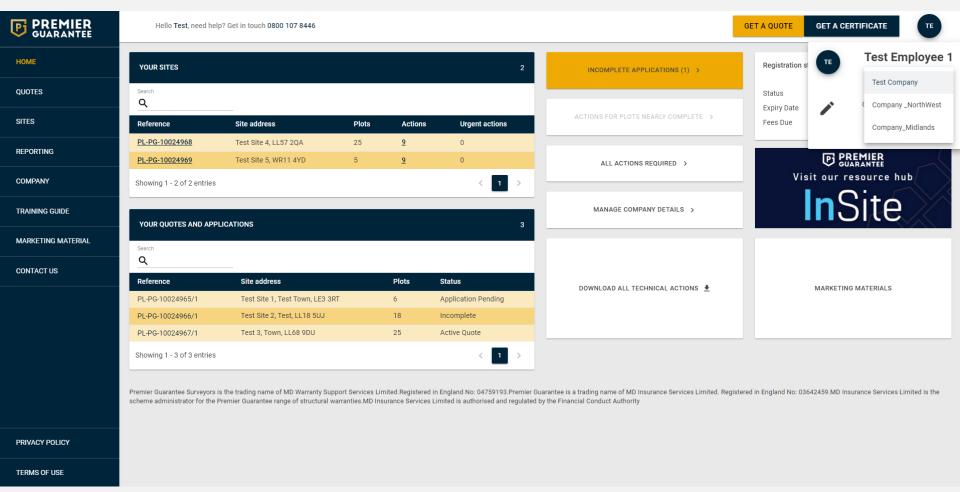
### Home: Update password and select company to view in this session



You can change your Extranet password or log out of the system by clicking on your initials in the circle in the top right hand corner of the screen. If you are registered under multiple companies, you are able to choose which you want to view from the drop down list. If this has not been enabled, please email **extranet@premierguarantee.co.uk** with the Premier Guarantee registration number for each company you wish to be added.

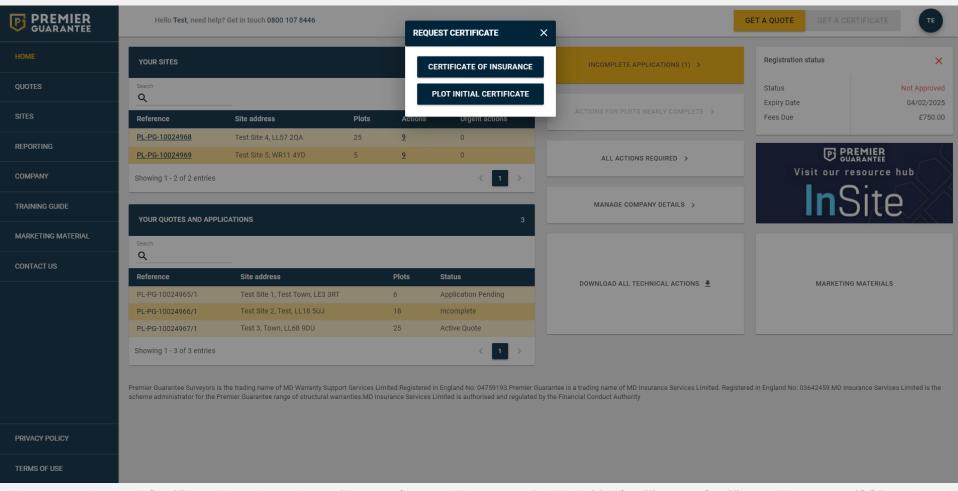


### Home: Update password and select company to view in this session



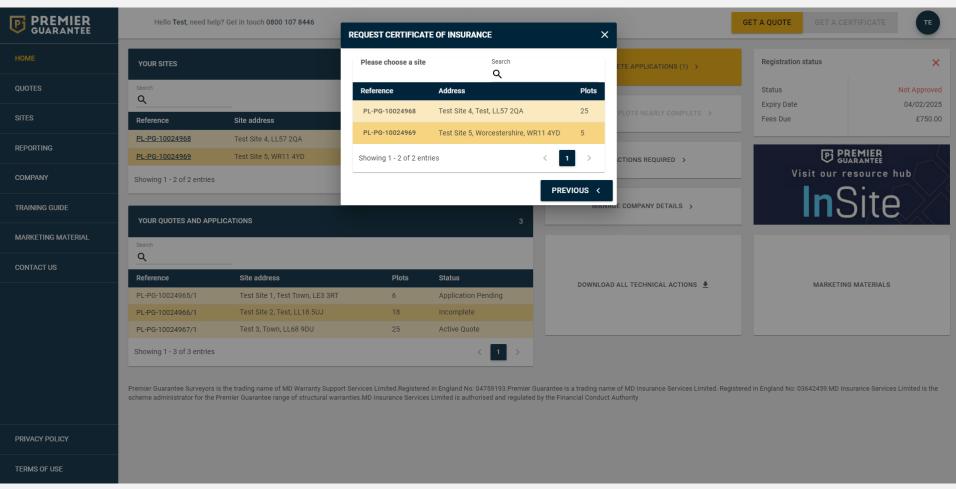
Select and click the company you want to view in this session and the Home page and site information will update accordingly. Please note that you will need to repeat the process for each different company by clicking on your initials in the top right hand corner. You are unable to view sites registered under different limited companies together in a consolidated view.





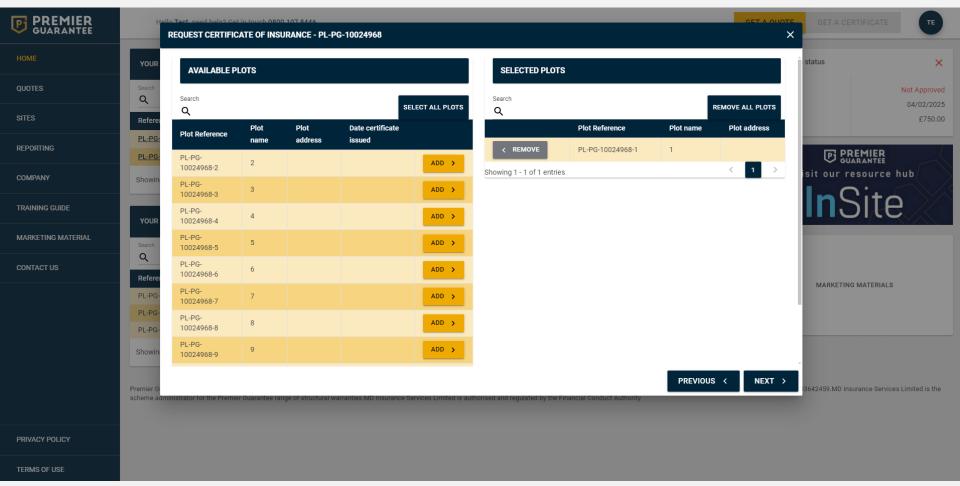
You can use the Get A Certificate link on the top bar to filter your Sites and Plots to see if a Plot Initial Certificate or Certificate of Insurance (COI) can be issued or if there are any Actions outstanding which would stop this. Click the relevant option for the type of certificate you require.





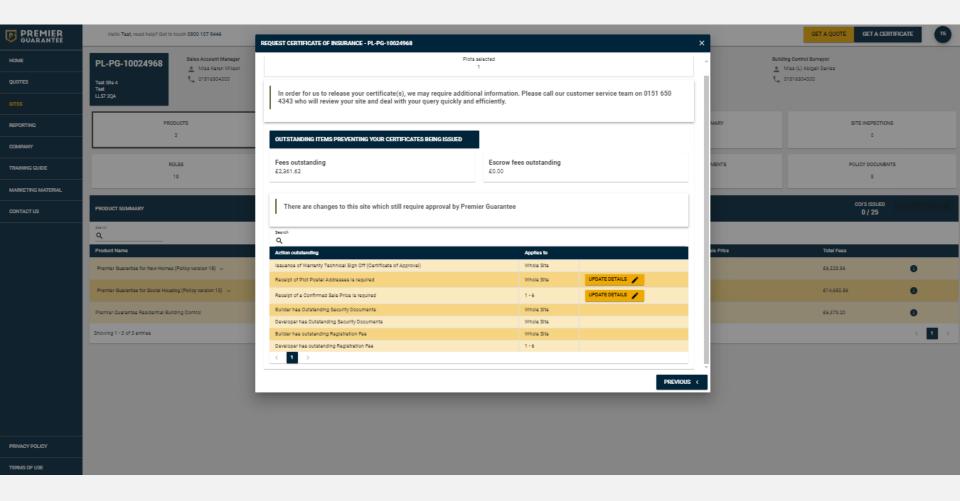
You need to select the relevant **Site** from the list by clicking on the reference number.





Select one, all or however many Plots that the certificates are needed for by clicking the Add button against each one, then click Next to proceed.

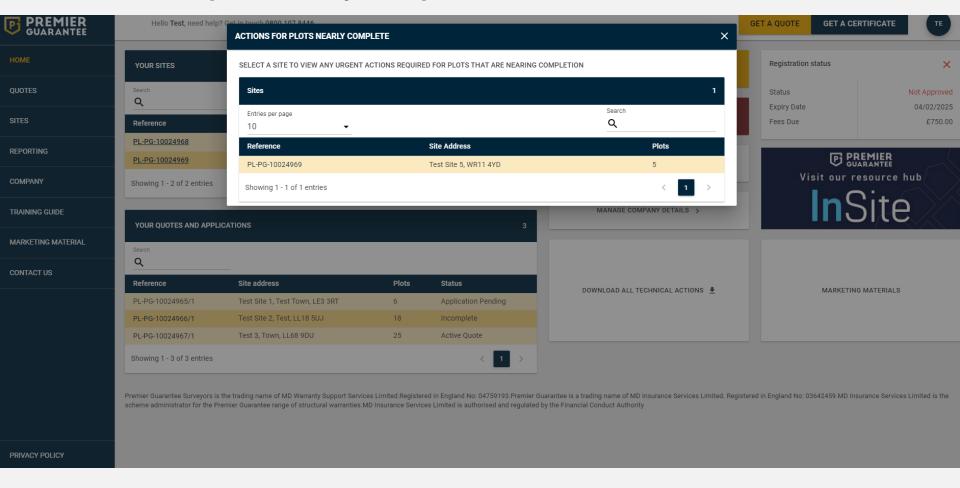




This will show if there are any outstanding **Actions** which would stop the relevant certificate(s) from being issued.



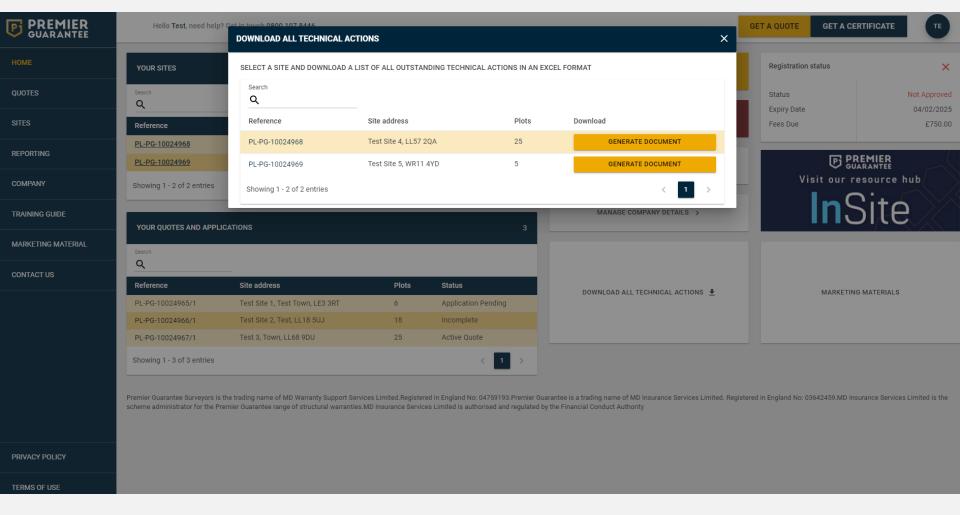
#### Home: Filter plots nearly complete



You can use the **Actions For Plots Nearly Complete** link to select a **Site** and view any urgent **Actions** required for Plots nearing completion.



#### Home: Download technical actions



You can use the **Download All Technical Actions** link to download all technical related items or Actions that must be completed before a Plot can be signed off as complete. Select the Site required and click **Generate Document** to produce the report in Excel format.

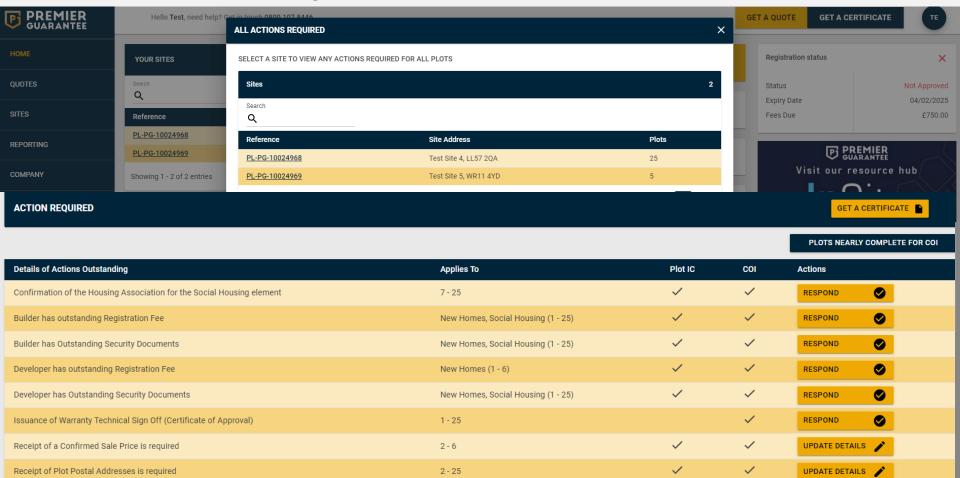


#### **Home: Download technical actions**

Summary				
-				
This document details all technical	l items for the development detailed below. There are a n	umber of tabs separating out the	requirements;	
	·		•	
Risks & Condit	ions Areas that may provide additional risk due to their nature.	These may require specific inspection	n by your surveyor.	
	<b>Defects</b> Defects identified on site by our surveyor must be satisfactorily resolved prior to sign-off.			
	Please refer to the Design Review Report (DRR) for all outstanding design related items as issued by your Major Projects Manager under separate cover.			
	Please also refer to the Certificate Progress Report (CPR) for the collection of completion documents issued separately by the surveyor.			
if you have any questions regarding	your development please contact one of your dedicated p	people listed below.		
-1				
Site Information				
Site Reference:		PL-PG-10024968		
Site Address:	Test Site 4, Test, LL57 2QA			
Warranty Units:	25			
Building Control Units:	25			
Development Types:	New Homes, Social Housing			
Contacts:				
Role	Company/Person	Tel	Email	
Developer:	Test Company			
Builder:	Test Company			
Site Report Recipient:	Mr Test Employee 1	01214532212	crisp-dev-q1@ext-crisp.co.uk	
Warranty Document Recipient:	Mr Test Employee 1	01214532212	crisp-dev-q1@ext-crisp.co.uk	
Internal Contacts:				
	Company/Person	Tel		
Role				
	Mr RMS	01516504300		
Risk Management Surveyor:	Mr RMS			
Risk Management Surveyor: Building Control Surveyor:	Mr RMS Miss BC surveyor	01516504300		
Risk Management Surveyor: Building Control Surveyor: Account Manager:	Mr RMS			
Role  Risk Management Surveyor:  Building Control Surveyor:  Account Manager:  Customer Service Account Handler:  Design Review Surveyor:	Mr RMS Miss BC surveyor Miss Account Manager	01516504300 01516504300		



#### Home: All actions required



You can use the All Actions Required shortcut link to view all actions that must be completed before a Certificate of Insurance (COI) can be issued. You must select a Site to do this and view the Action Required tab for the site chosen and lists all actions outstanding.



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# Get a Quote

02.



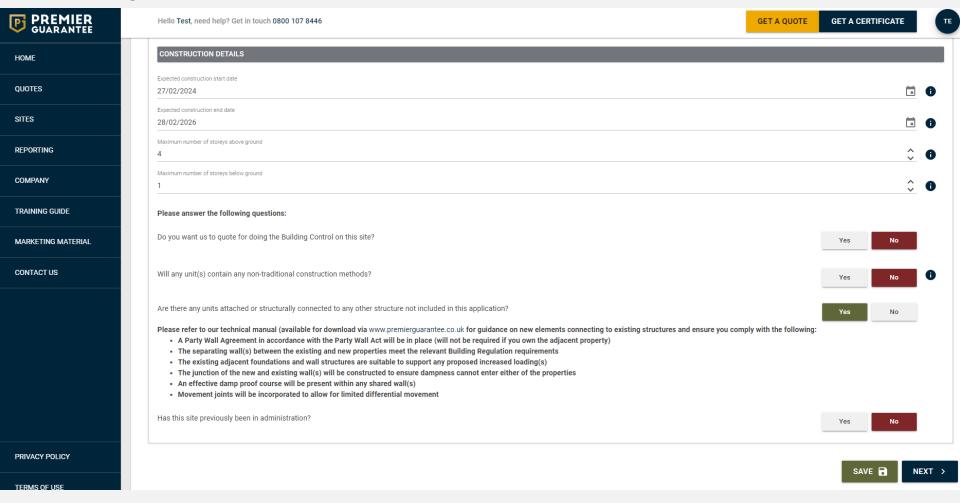
### Get a quote: Site details

PREMIER GUARANTEE	Hello Test, need help? Get in touch 0800 107 8446				
НОМЕ	Quote application				
QUOTES	STEP 1: SITE DETAILS / STEP 2: PLOT DETAILS / STEP 5: DECLARATION DETAILS / STEP 4: ROLE DETAILS / STEP 5: DECLARATION DETAILS /				
SITES	In order to provide a formal quotation, all sections of this application form must be completed and additional information provided where required. You are able to save and return to the application form as required. The guidance notes section provides additional help and guidance in completing this application form. If you have any questions please do not hesitate to contact us.  PLEASE NOTE: Failure to complete all relevant sections of this form fully may result in us being unable to provide a quotation for your site. Incomplete forms may result in delays.  SITE DETAILS  QUOTE RECIPIENT DETAILS				
REPORTING					
COMPANY					
TRAINING GUIDE					
MARKETING MATERIAL	Quote recipient  Mr Test Employee 1  ▼ 1				
CONTACT US	Quote recipient office  Office 1, LE3 3RT				
	SITE ADDRESS				
	GHE ABBRECO				
	Address line one  You must enter a value				
	Address line two				
	Address line three				
PRIVACY POLICY	Town/city You must enter a value				
TERMS OF USE					

Select **Get a Quote** at the top of the screen to open up the quote application form. You can save the form at any time and return to it later but you will be unable to submit your application without all the mandatory information supplied.



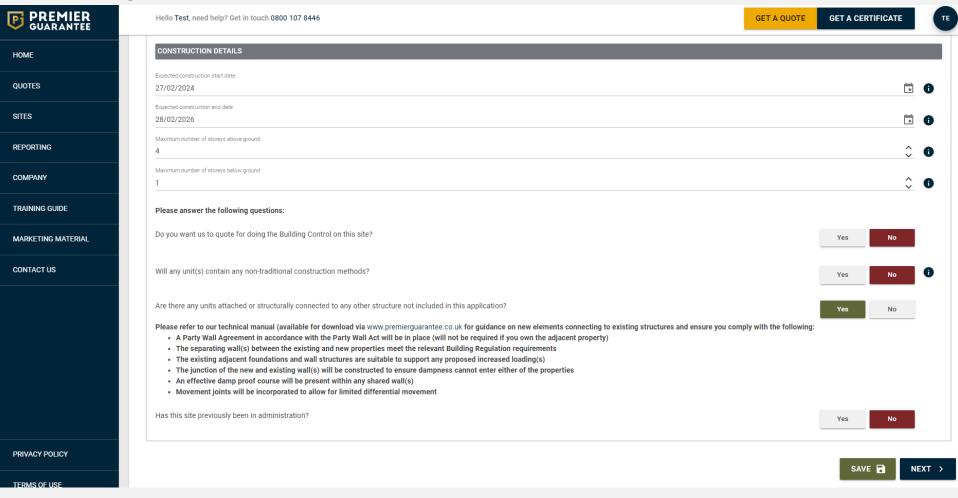
#### Get a quote: Site details



The Get a Quote application form is dynamic and will only ask the questions relevant to your project. Support text is provided to help you complete the form by clicking the (i) icon and you will be alerted if any information has not been provided.



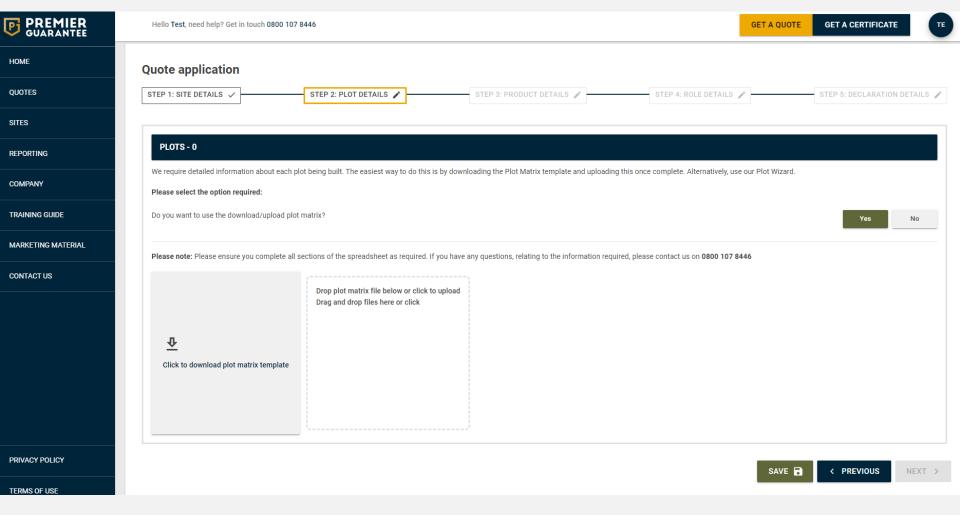
#### Get a quote: Site details



The **Save** button will enable you to save and exit the form. Any saved applications can be accessed via the **Home** page quick link. Click **Next** to proceed to the next page.



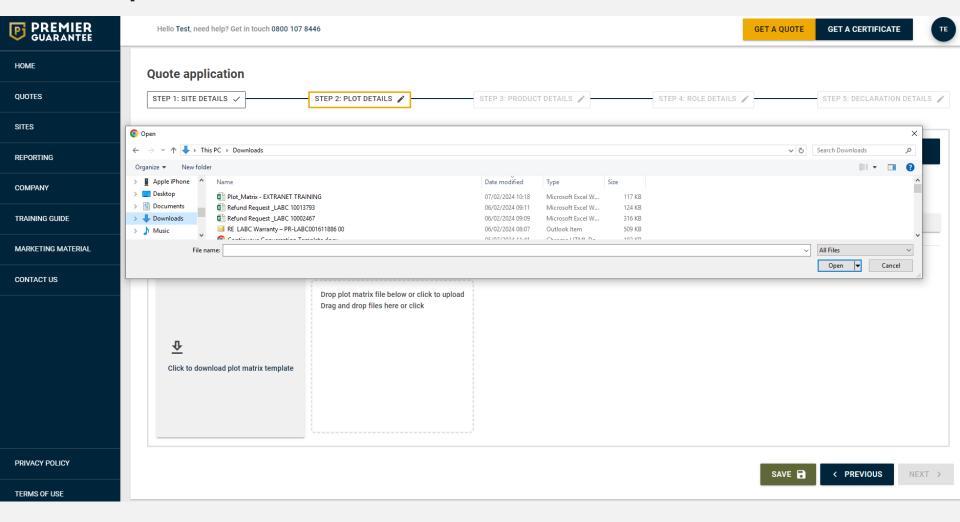
#### Get a quote: Plot details



You are able to download and upload an Excel document to provide Plot information as requested or select the manual option and complete the Plot information on screen.

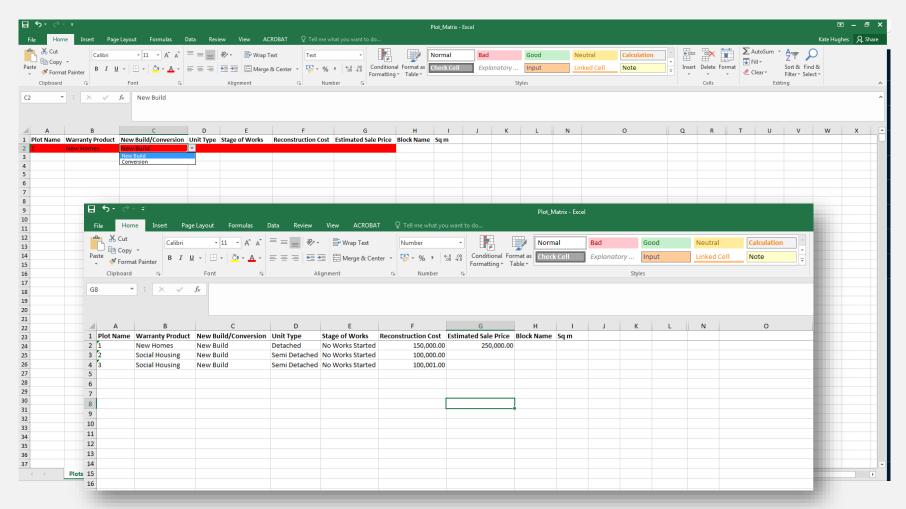


#### Get a quote: Plot matrix





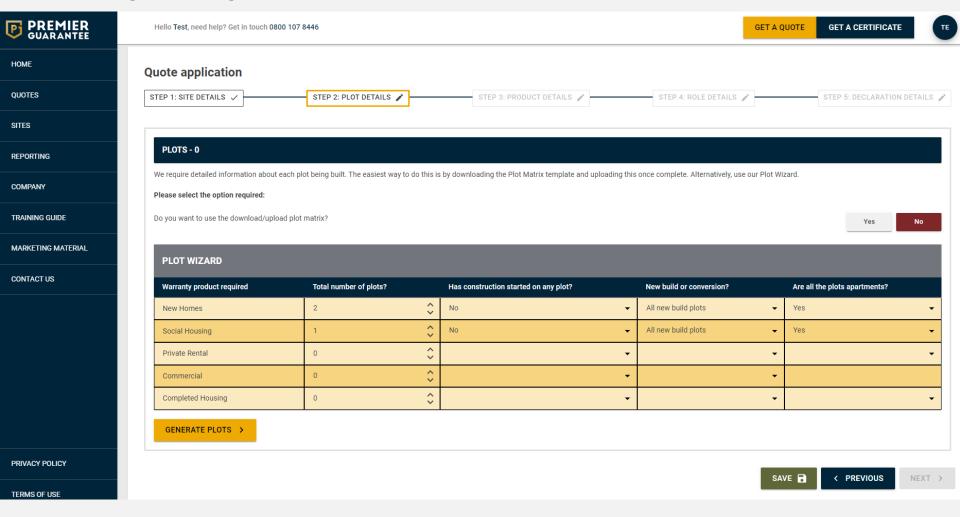
#### Get a quote: Plot matrix



If you have downloaded and saved the Plot Matrix, you will need to complete the information required by using the dropdown boxes.



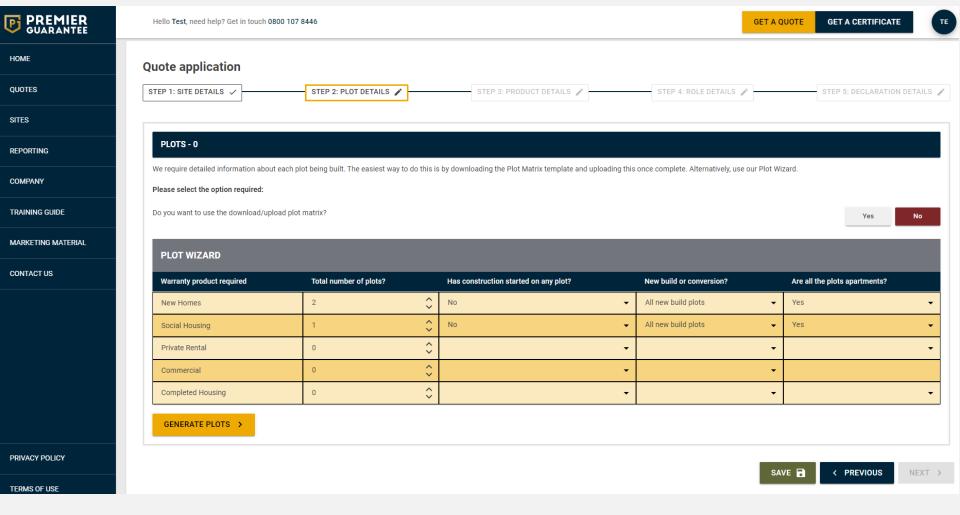
#### Get a quote: Upload



The information uploaded in the Plot Matrix will be automatically totalled and displayed on screen as a summary once the Excel sheet is uploaded. You can amend any of the details uploaded by clicking the dropdown arrows, or re-loading the updated Excel using the **Reload Plot details** button.



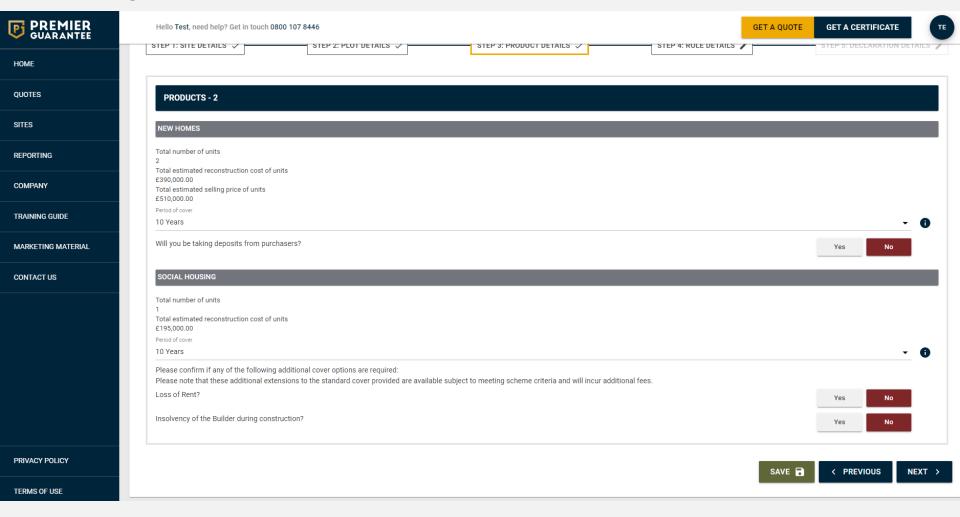
### Get a quote: Change plot information



You are able to re-upload if required by selecting the **Reload Plot Details** link or the information can be manually updated on screen by clicking the arrows in each section of the table.



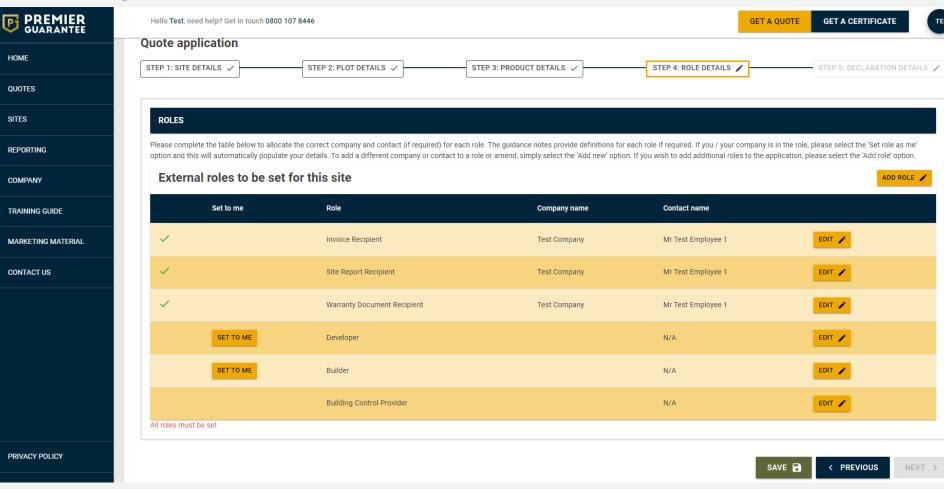
#### Get a quote: Product details



You will be asked further questions relating to the products selected e.g. New Homes, Social Housing, Private Rental etc.



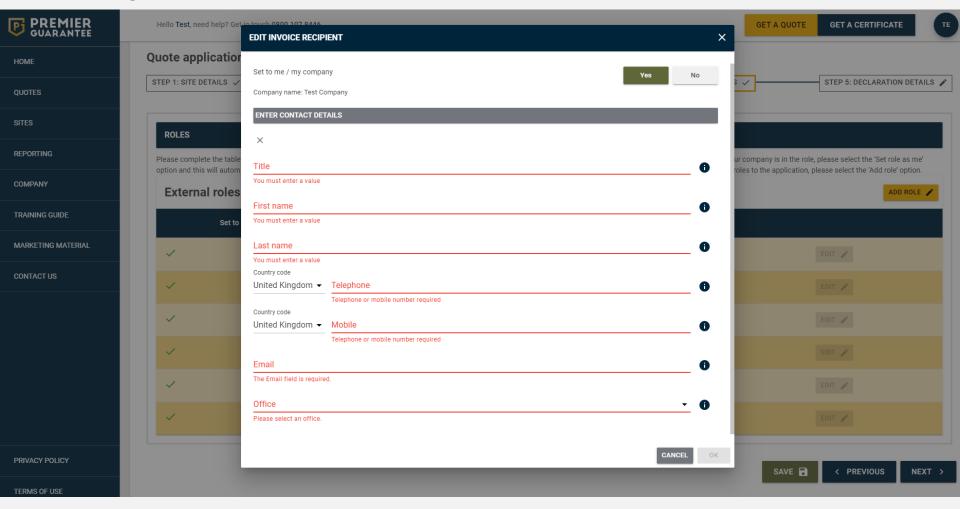
#### Get a quote: Role details



These are the companies and contacts who will have a role on your site. You must allocate a contact to each role in order to proceed or set these as you. Add Role enables additional roles to be added or new companies/contacts can be added via the Edit link.

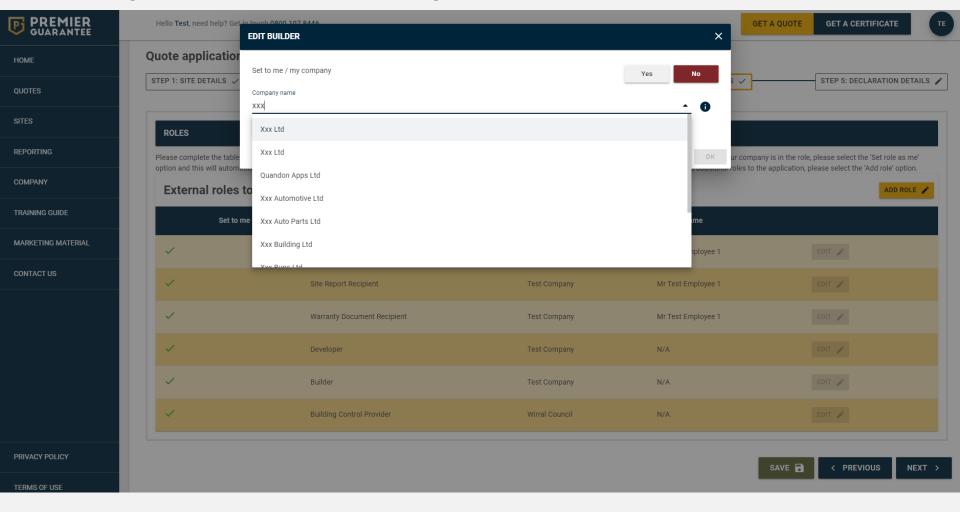


### Get a quote: Edit role



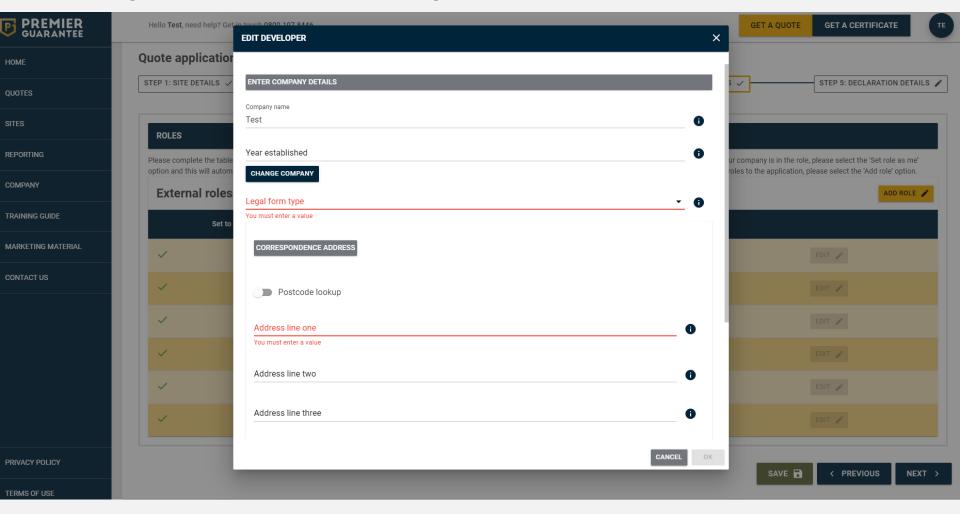
To edit a role, select **Edit** and complete the information in the dialogue box before selecting **OK** to save.





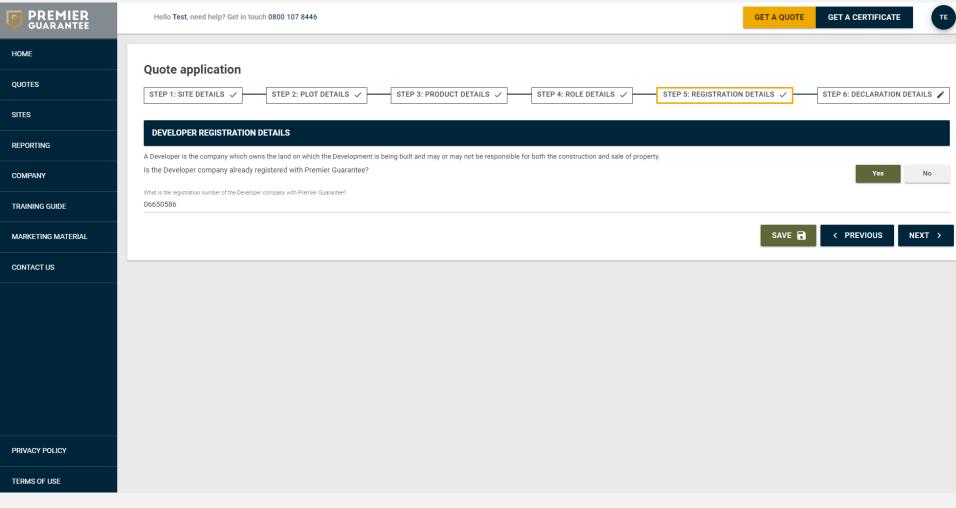
If you are using a separate developer or builder for your project, click **Edit** and start typing the developer's or builder's company name, and then select the correct option from the dropdown list. If the company is not already listed, click **Add Company Details Manually**.





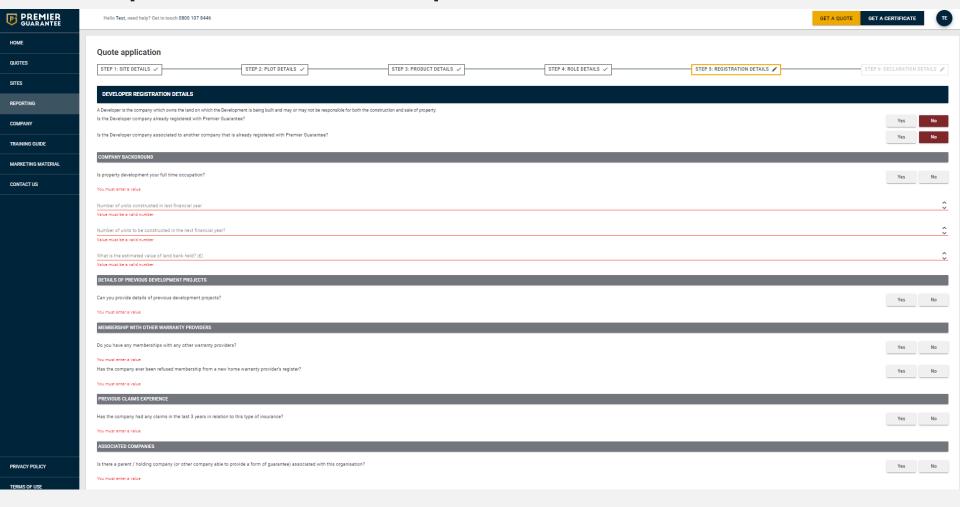
Check that the company information detailed is correct (if already listed) or complete the dialogue box and click **OK** to save. The role will then be populated with the company name provided.





You must confirm if the developer and/or builder is registered with Premier Guarantee and if so, provide their seven digit registration number e.g. REG/PG/3000000

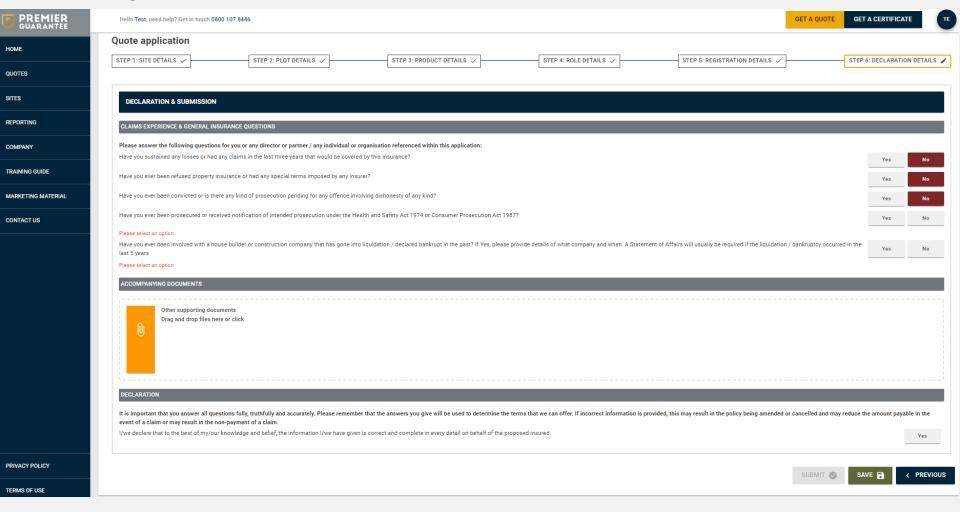




If the developer and/or builder is not registered, you must provide details of their construction and claims experience.



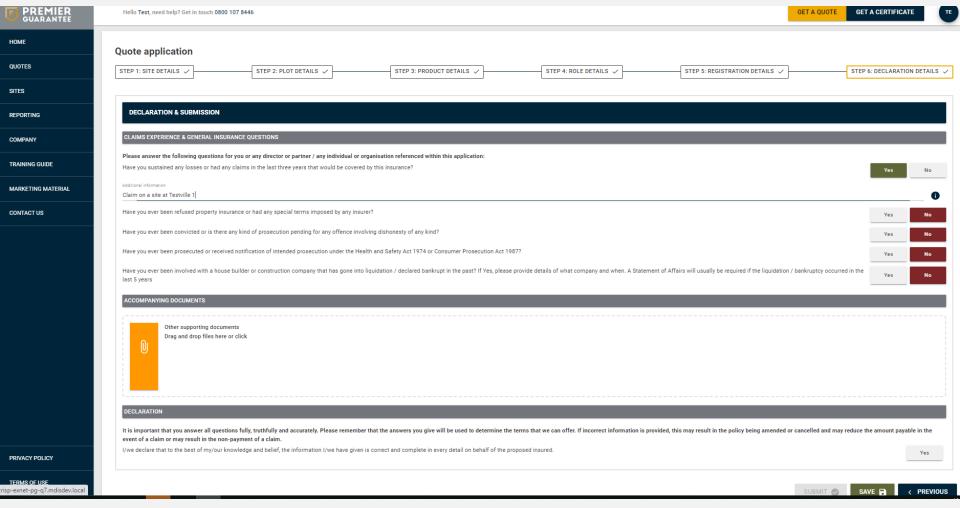
#### **Get a quote: Declaration**



You are required to complete the claims and general insurance declaration.



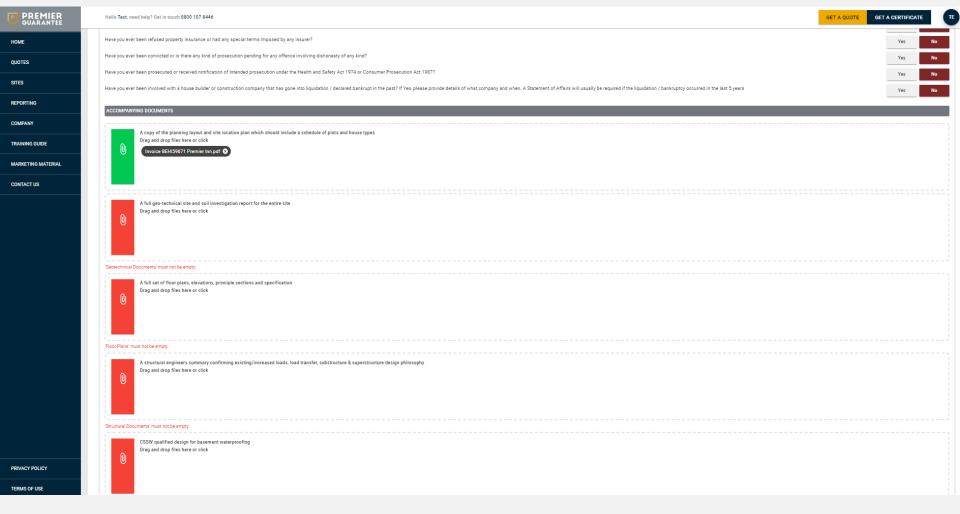
#### **Get a quote: Declaration**



You will be advised if any additional information is required to be uploaded based upon your responses.



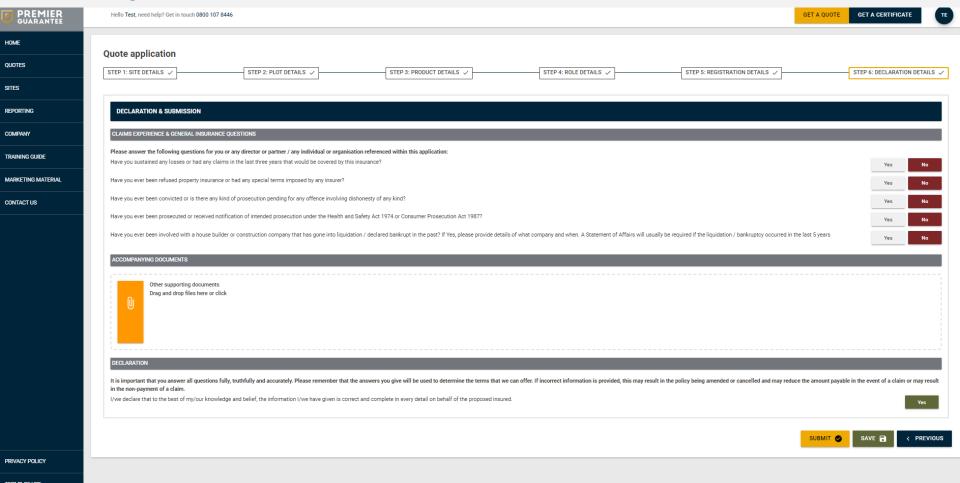
#### Get a quote: Uploading supporting documents



You will be required to upload any documentation related to your application before submitting your **Quote** application. You will be able to see on screen if the upload has been successful and delete/re-upload if required.



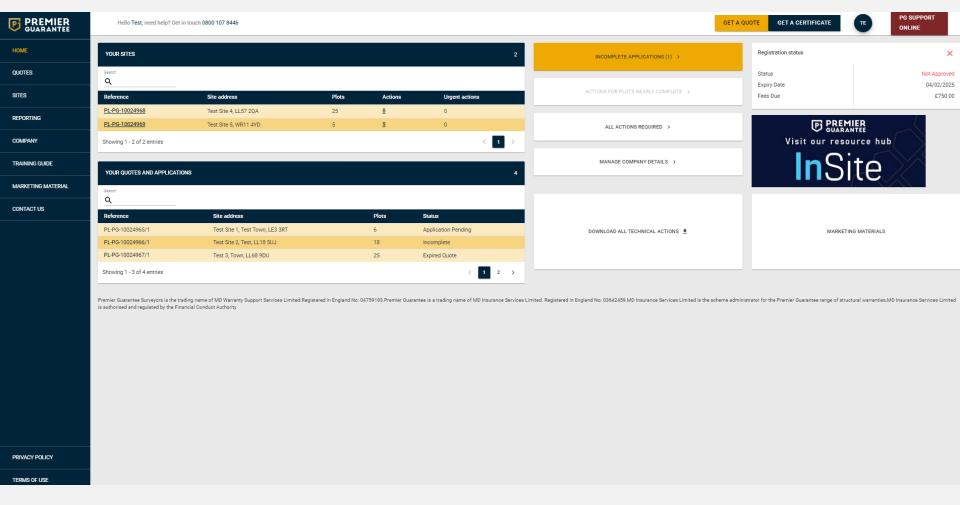
#### Get a quote: Submission



Once all the information required is complete, you will be able to click the Submit button. This will submit the application and you will receive the formal quotation document bundle and terms and conditions via email once it has been formally underwritten.



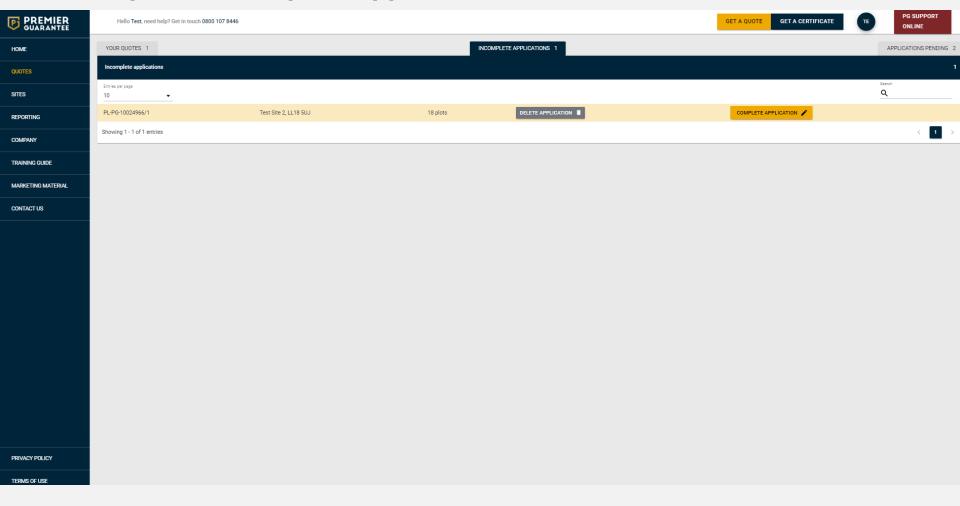
# Get a quote: Application pending



Once submitted, your application will show on the **Quotes** tab under **Applications Pending**. You will be sent your formal quotation via email. You are able to download a copy of your quotation from the extranet.



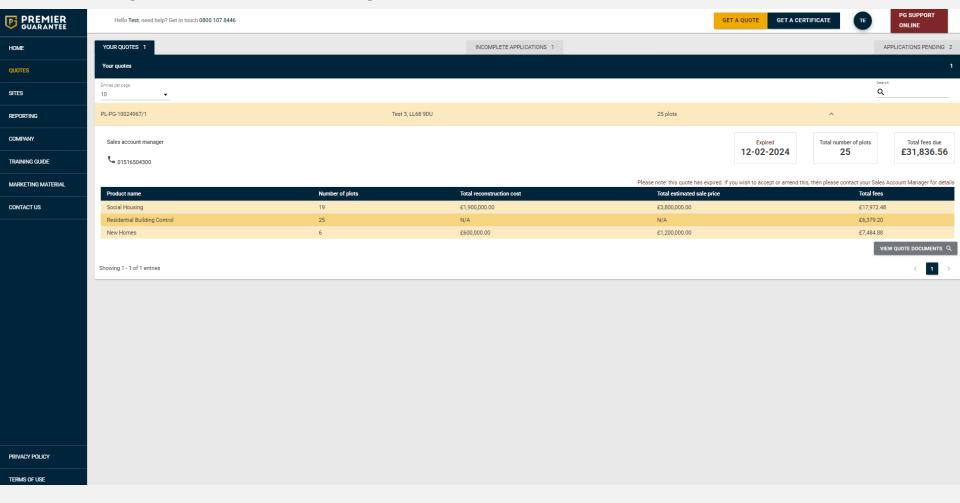
# Get a quote: Incomplete applications



Any incomplete applications can be accessed via the Home page quick link or the Quotes tab under Incomplete Applications. Click Complete Application to continue with the application or **Delete Application** to remove from the Extranet.



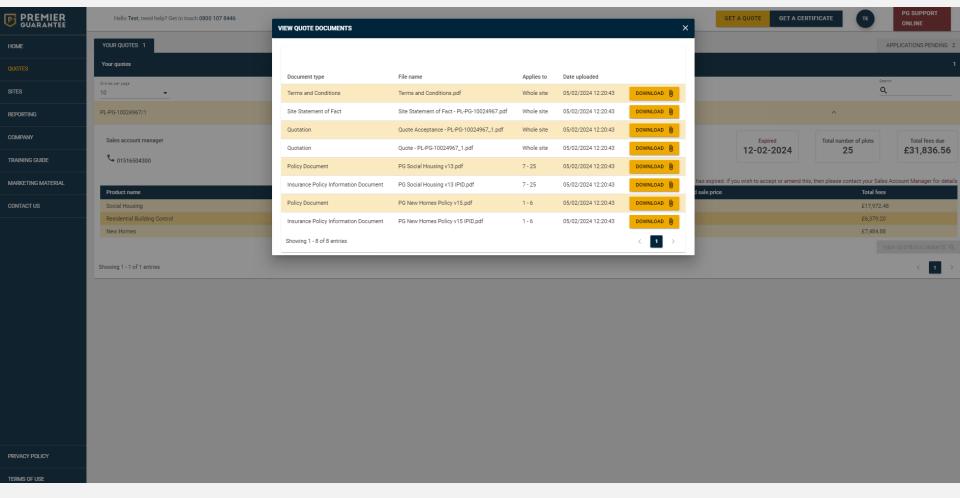
## Get a quote: Your active quotes



Any quotes which have been submitted via the Extranet and not yet accepted, will be available to view under the **Quotes** tab and **Your Quotes**. Click on the **View Quote** button to view the quote summary and quote related documentation.



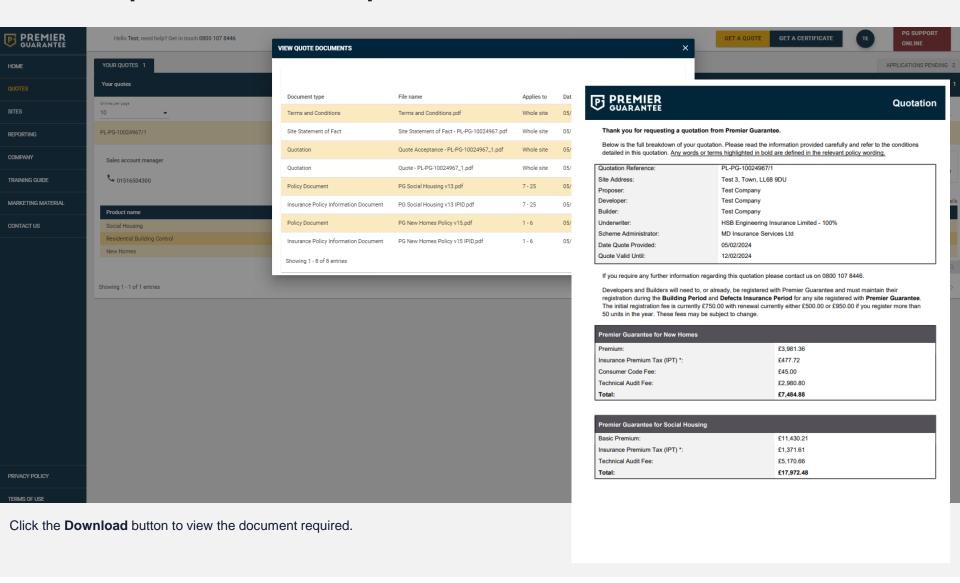
## Get a quote: Your active quotes



Click the **Download** button to view the document required.



## Get a quote: Your active quotes





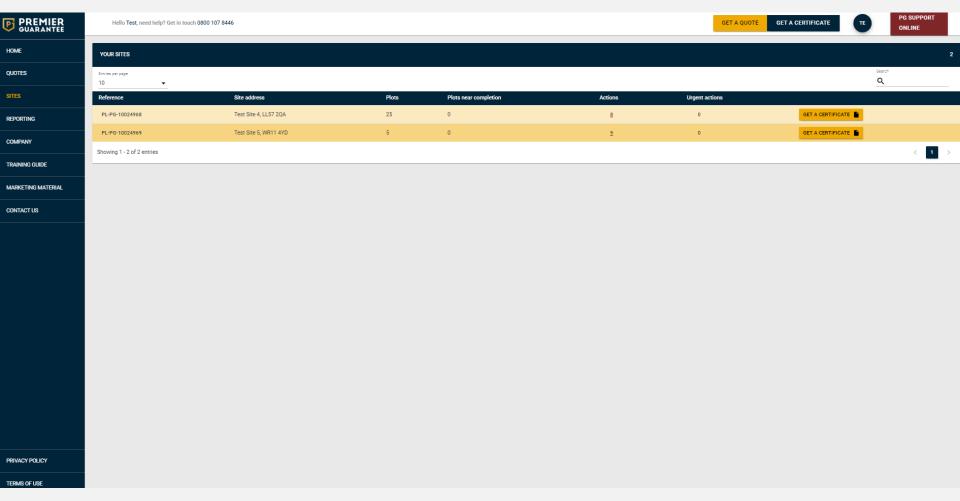
**Sites** 

03.





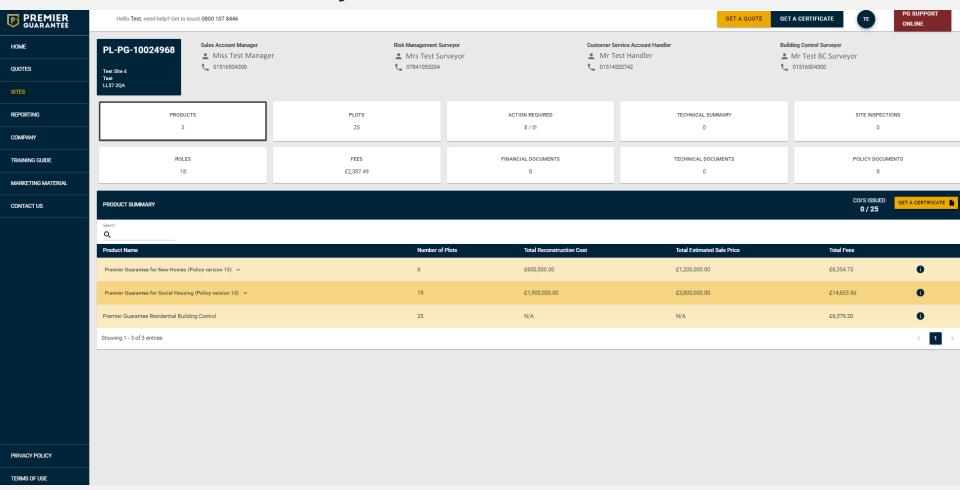
# Sites: Summary of sites registered



Your Sites is a list of all the open sites registered with Premier Guarantee since 1<sup>st</sup> January 2016. Click the reference number to open the record. This shows a summary of **Plots** and **Actions** outstanding. **Urgent Actions** relate to **Plots** nearly complete.



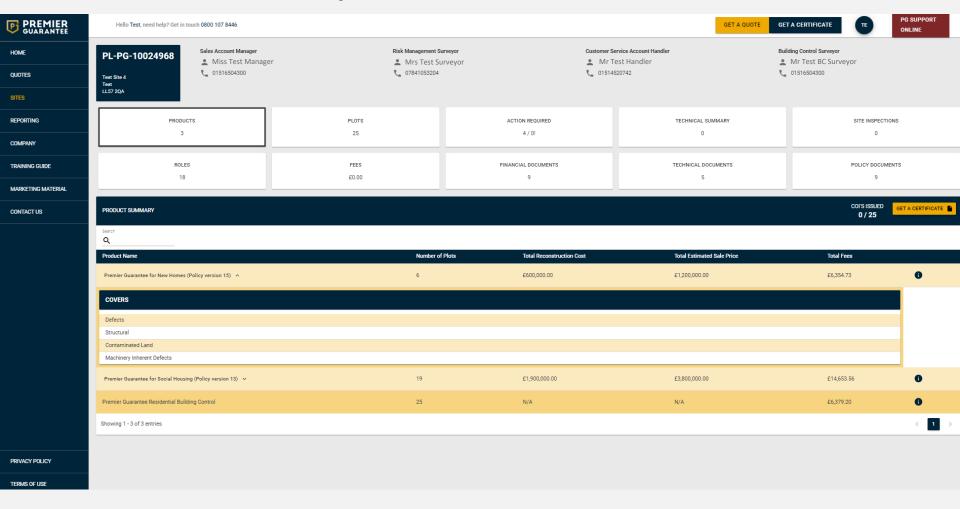
## **Sites: Product summary**



This shows a summary of the warranty products associated to your Site and if any Certificates of Insurance (COI) have already been issued.



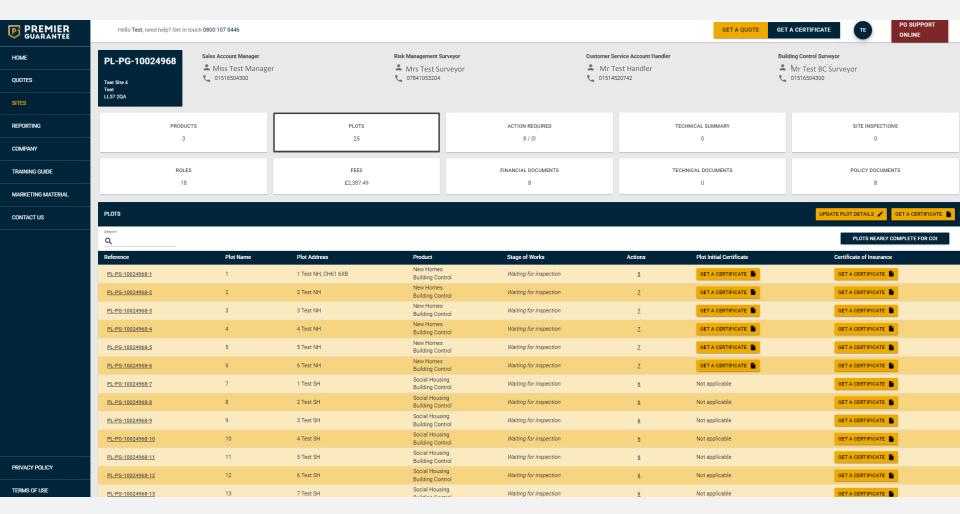
# **Sites: Product summary**



Each warranty product can be expanded to show what cover is has been included.



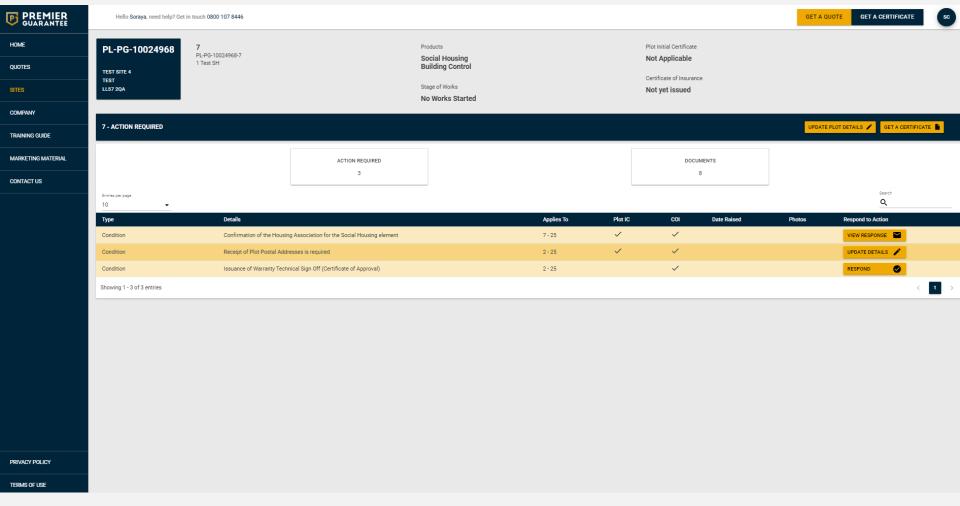
#### **Sites: Plots**



This is the **Plot** summary screen and shows all plots associated to your **Site** outstanding **Actions** or **Documents** issued for the **Plot** selected. You can switch between **Actions** and **Documents** using the two main buttons. To return to the main site summary screen click the site reference in the blue box in the top left corner.



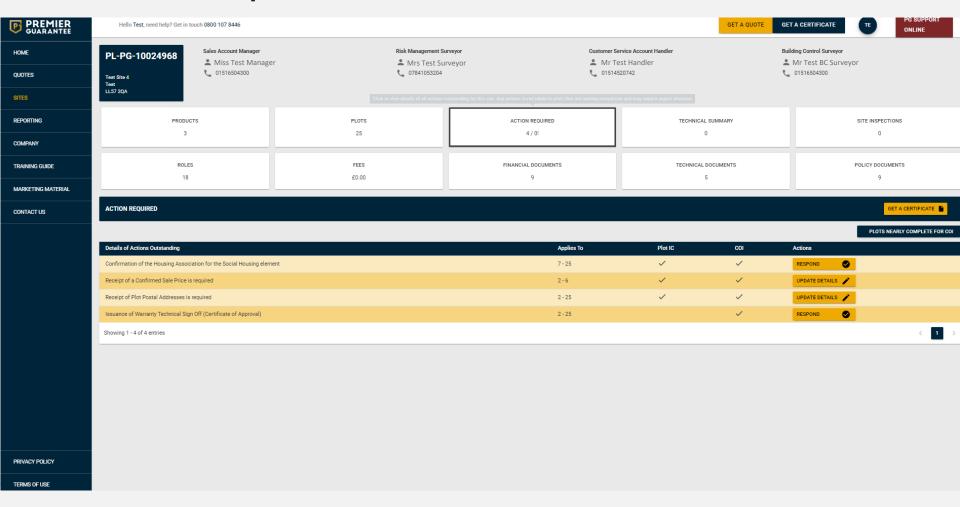
#### **Sites: Plots**



This is the individual Plot summary screen. You can switch between Actions and Documents using the 2 main buttons. To return to the main Site summary screen click the site reference in the blue box in the top left corner.



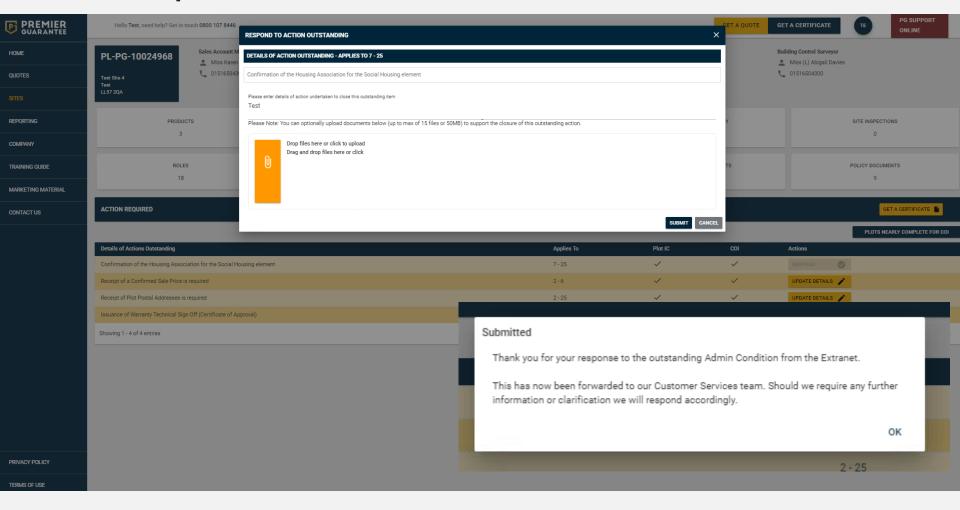
## **Sites: Action required**



Actions relate to any item or action that must be completed by you before a certificate can be issued.



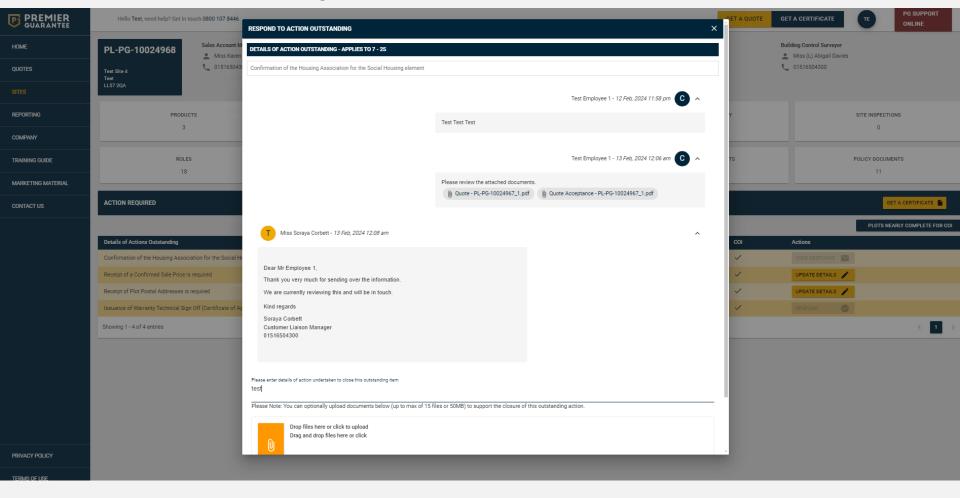
## Sites: Respond to action



You must confirm what has been done to close off the Action and you can upload evidence to support this. Confirmation of successful submission will be shown on screen and the Respond To Action status with change to **Pending**. An email notification is sent when the **Action** is closed.



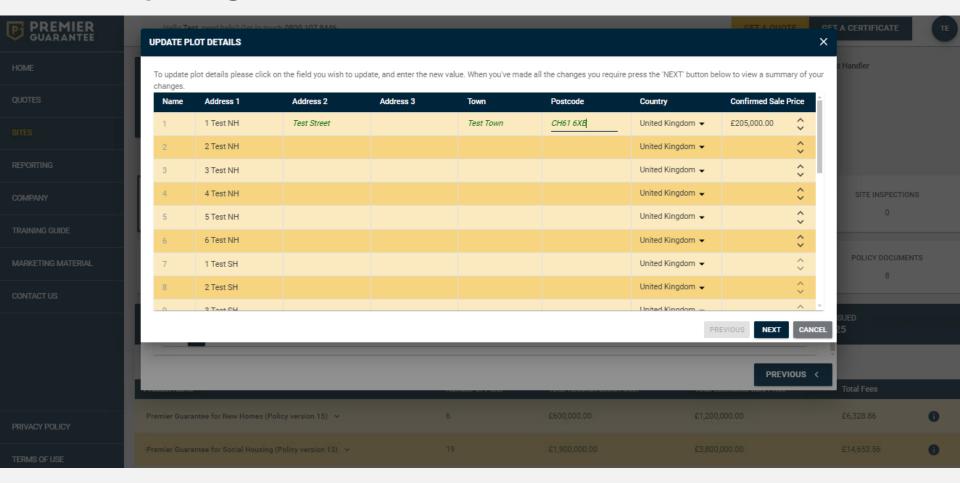
## **Sites: View action response**



Once your response to the Action is reviewed by the Premier Guarantee team, if further action or information is required, you will receive an email confirming the details. This will also be available to view on the Extranet via the View Response button. Once the Action has been closed, you will no longer be able to see any responses.



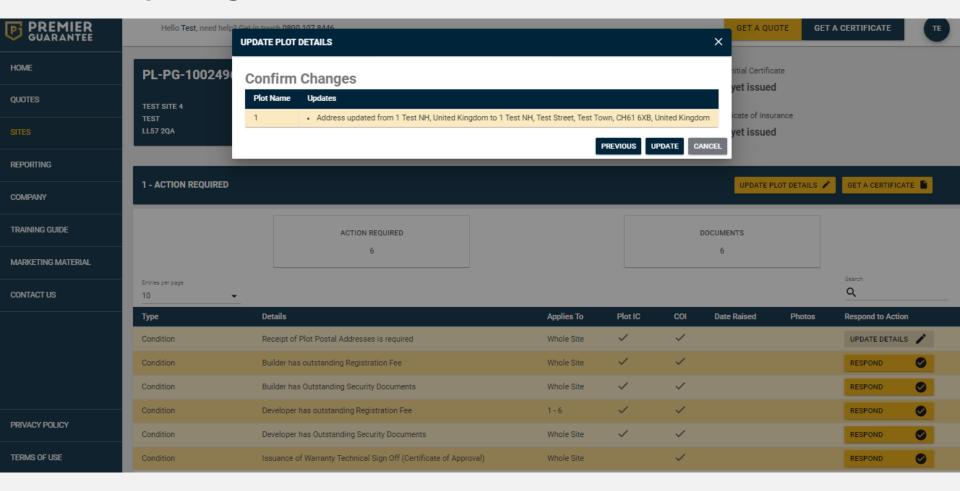
## **Sites: Updating Plot Details**



Select the **Update Plot Details** to add or update the Sales price or the plot address. You can type into the boxes in the window. Once updated click **Next** to move to the next screen.



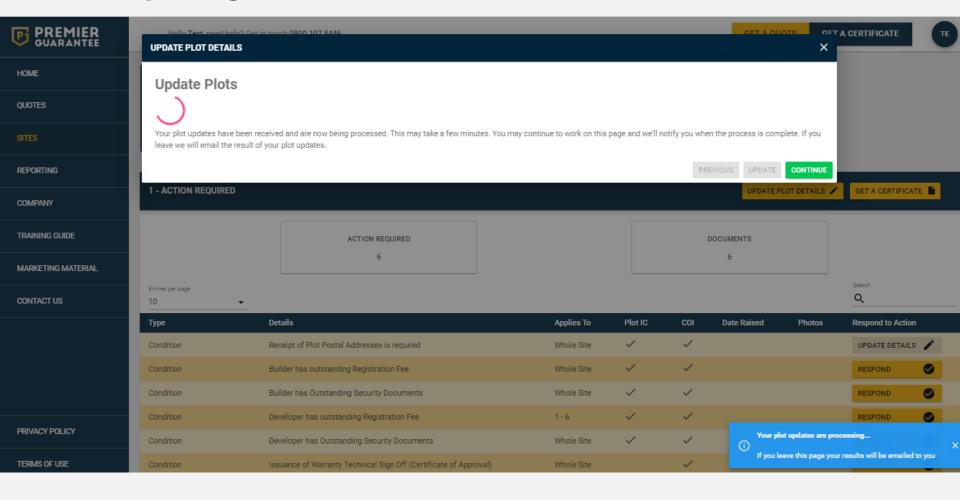
## **Sites: Updating Plot Details**



The changes made will now show. Check the information is correct and then click **Update**. If you do need to make any changes then click **Previous**.



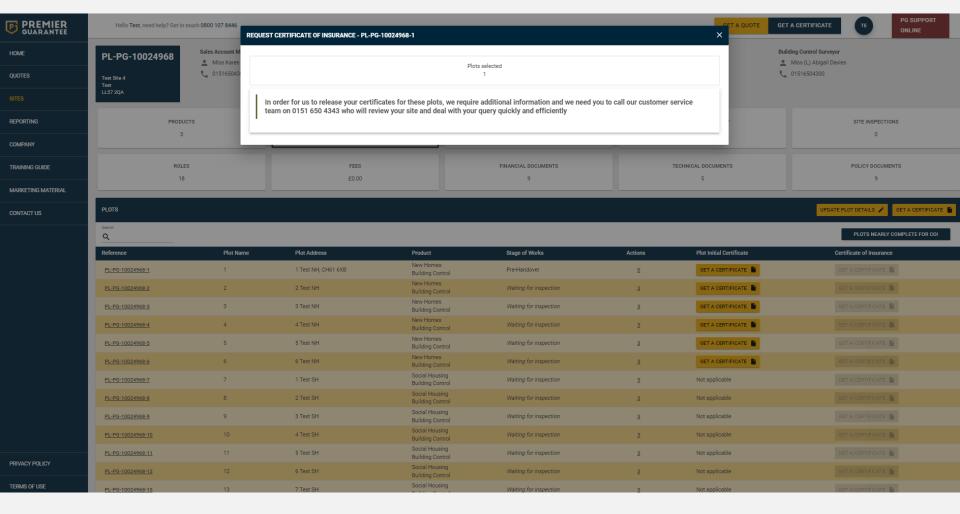
## **Sites: Updating Plot Details**



The system will update the information and a notification will pop up. If there is a lot of information being updated then you can close the notification bar and you will then be notified when the action is completed.

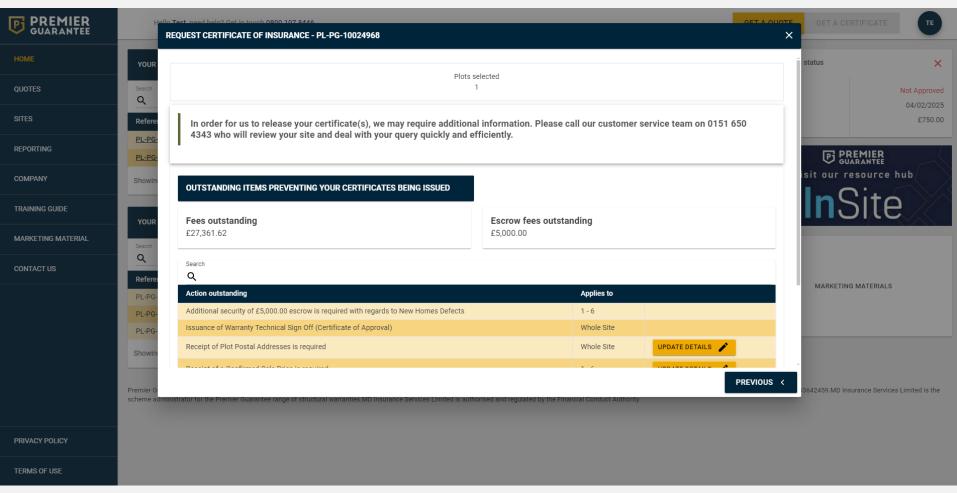


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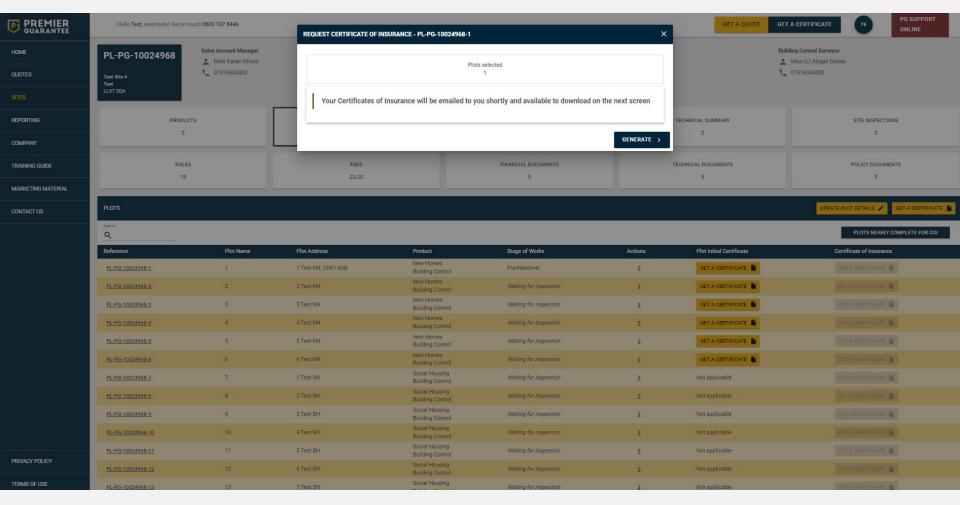
The **Get a Certificate** button will enable you to request a certificate for the relevant **Plot**. If you have outstanding **Actions** which prevent the certificate from being issued, these will be listed for your reference or will give you the number to contact head office .





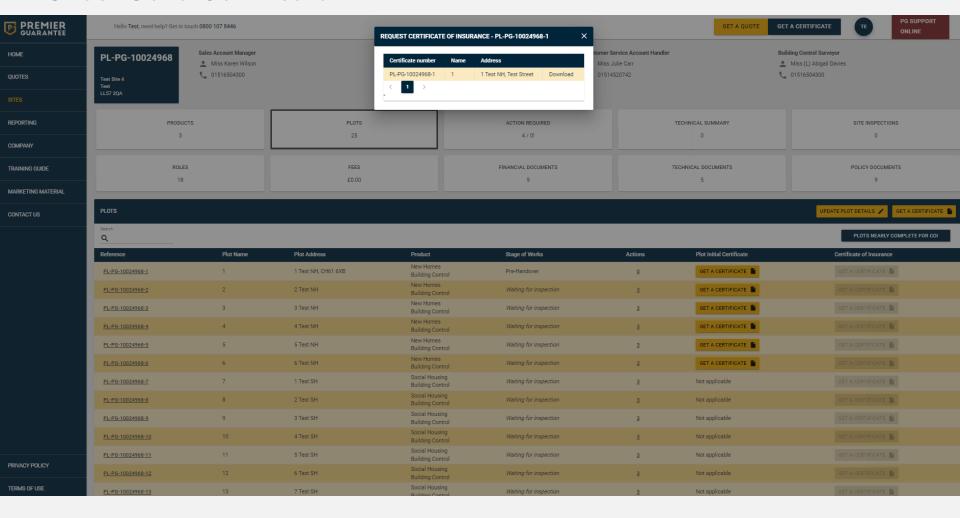
If you are trying to issue a COI and there are any outstanding **Actions** which would stop the relevant certificate(s) from being issued then this message will appear.





The **Get a Certificate** button will enable you to request a Certificate for the relevant **Plot**. If there are no **Actions** outstanding for the Plot then you can generate your own Certificate by clicking the **Generate** button. If you have outstanding **Actions** which prevent the Certificate from being issued, these will be listed for your reference.



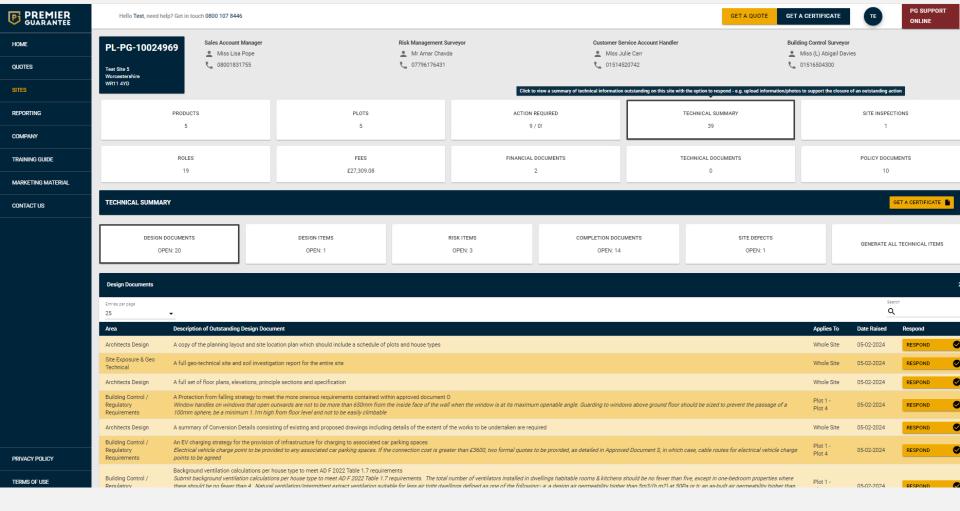


The Certificate will be available to view and download on screen and will also be emailed to you.



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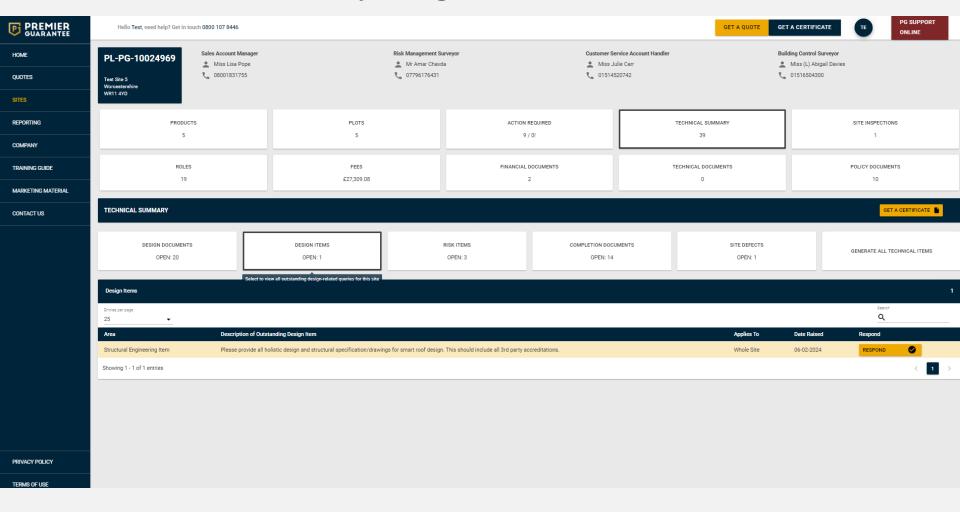
## Sites: Technical summary design documents



**Design Documents** are the design related documents your architect has produced for your Site (plans, drawings or calculations for example). These documents are required at the start of the project.



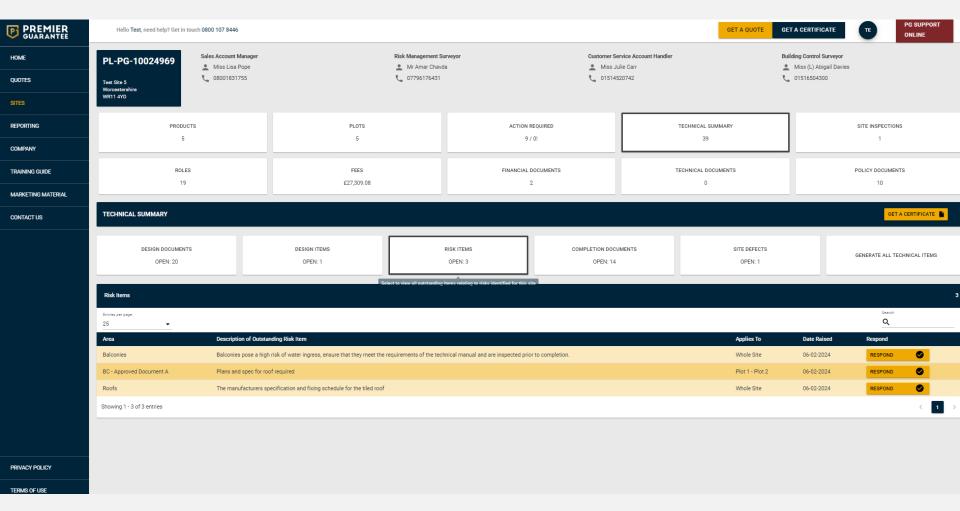
## Sites: Technical summary design items



**Design Items** are queries, questions or issues that our surveying team have raised in relation to the design elements of your construction project. Any items raised will require responses and closing before final sign-off.



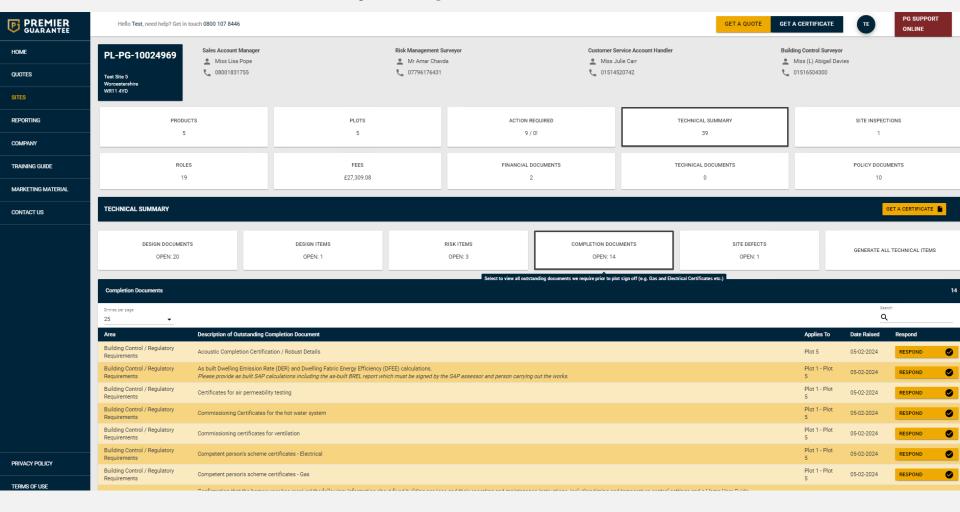
# Sites: Technical summary risk items



**Risk Items** are possible risk areas our surveying team have identified for your construction project that our on-site surveyor will need to verify and clear before final sign-off.



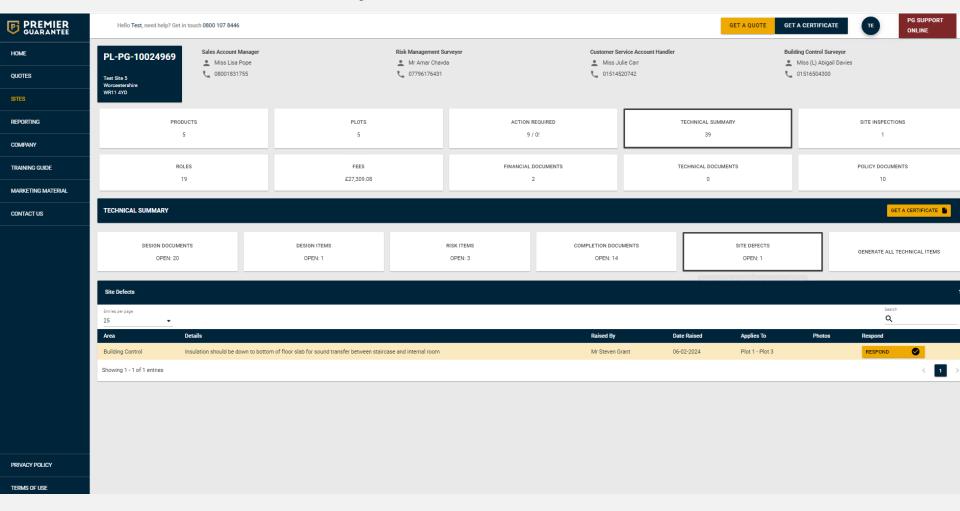
## Sites: Technical summary completion documents



**Completion Documents** are the certification documents for each house (electrical certificate or gas certificate for example) that we need to receive and review before signoff.



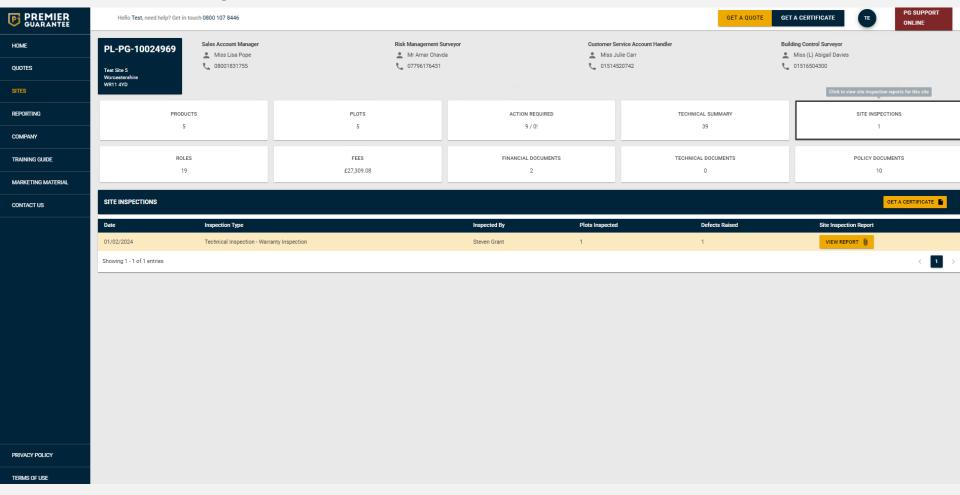
# Sites: Technical summary site defects



**Site Defects** are issues or problems that our onsite surveyor has raised when inspecting your project. They will need rectifying to our satisfaction before we can sign off any Plot.



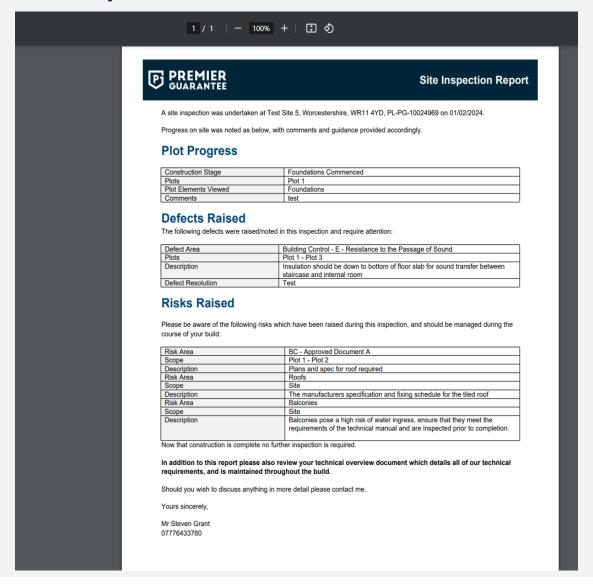
## **Sites: Site inspections**



The **Site Inspection** reports associated with any site visit will be listed here and available to view or download. If you need to access any historic reports please contact your customer services team. Select **View Report** to view the PDF.

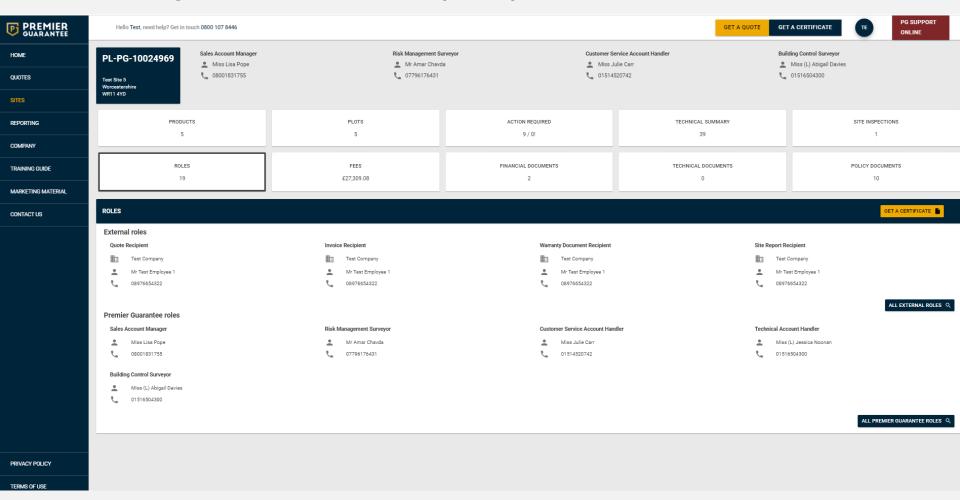


### **Sites: Site inspections**





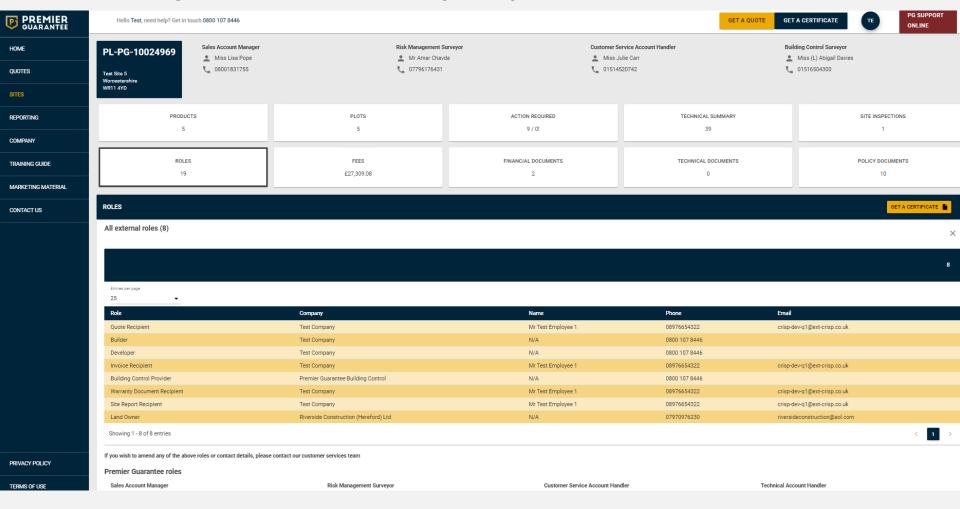
## Sites: People linked to the site (roles)



**Roles** are the companies and contacts who will have a role on your site. Should you need to make any changes, please call Customer Services on **0151 650 4343** or email **customerservice@premierguarantee.co.uk** including your site reference and details of the change.



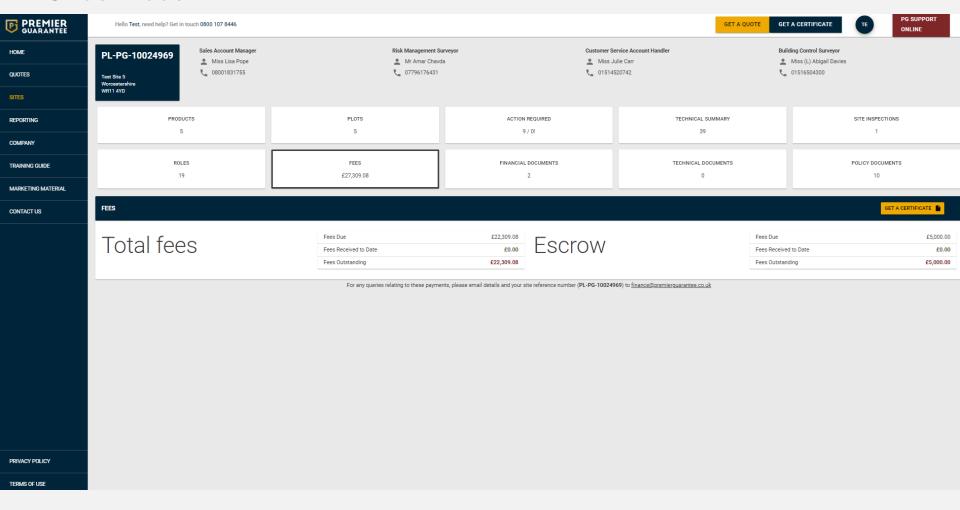
## Sites: People linked to the site (roles)



Expand to view all Roles or click the X to close.



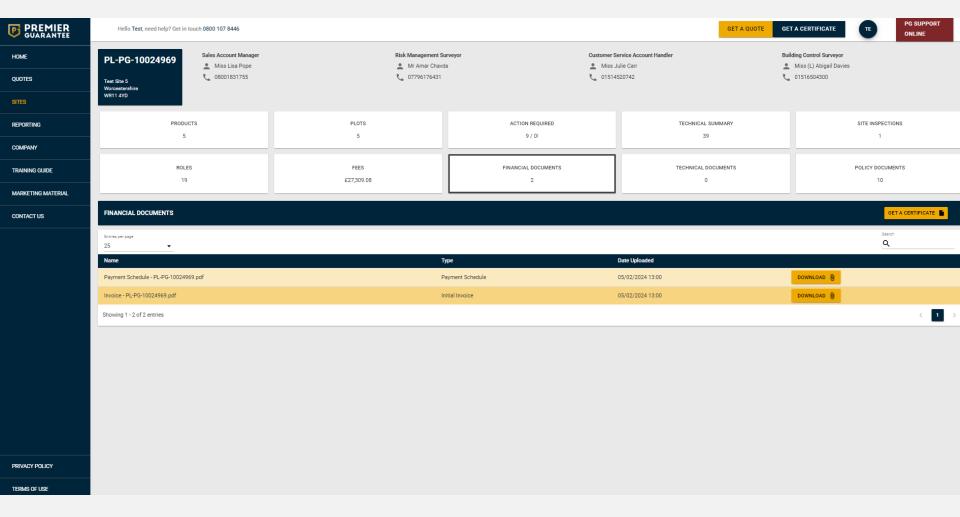
#### **Sites: Fees**



**Fees** shows a summary of any fees relating to the **Order**. For any queries relating to payments, please email your details and site reference e.g. PL-PG-1000000 to **finance@premierguarantee.co.uk** 



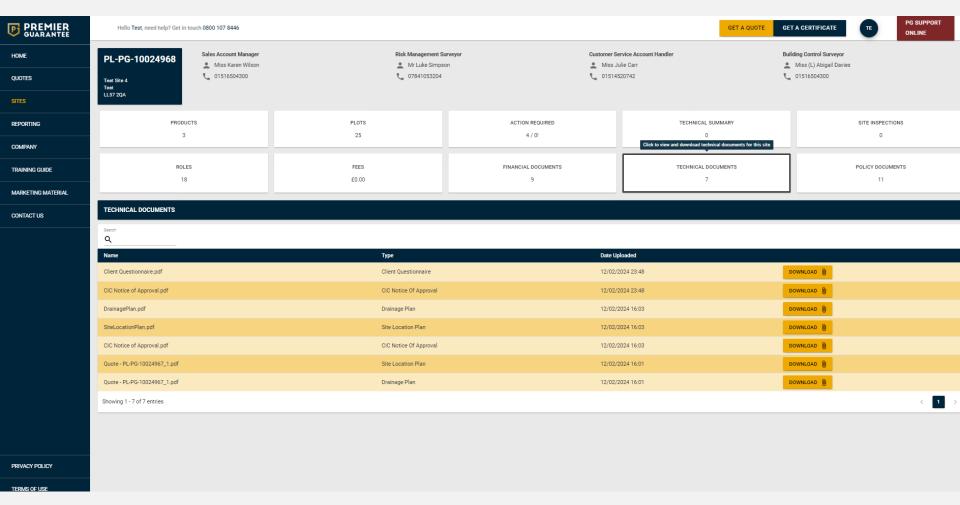
#### **Sites: Financial documents**



Here you are able to access any financial documents issued to your company including invoices, receipts and policy statements.



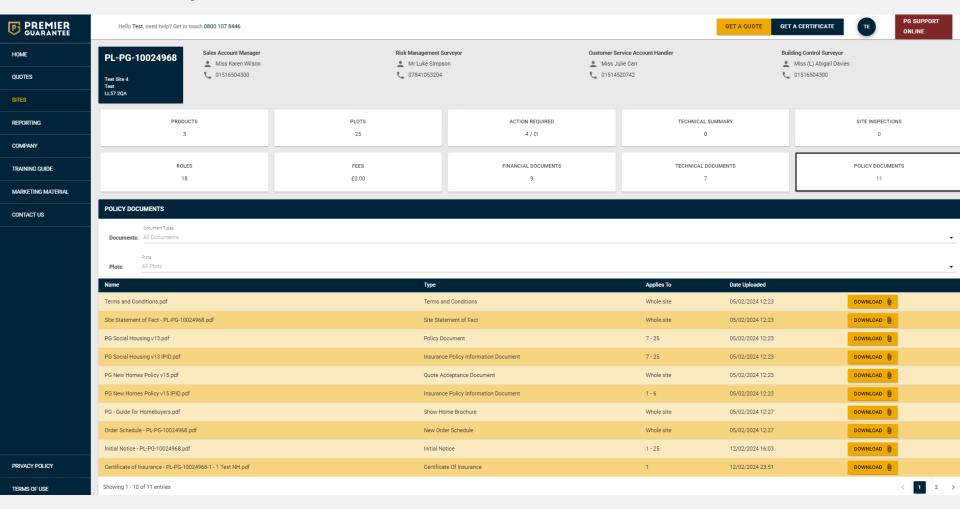
#### **Sites: Technical documents**



Any technical documents provided to Premier Guarantee are held here and available to download. Use the search function to find the relevant document required.



## **Sites: Policy documents**



Here you will find all documentation relating to the structural warranty provision such as policy and quotation documents. You are able to filter by document type and per plot.



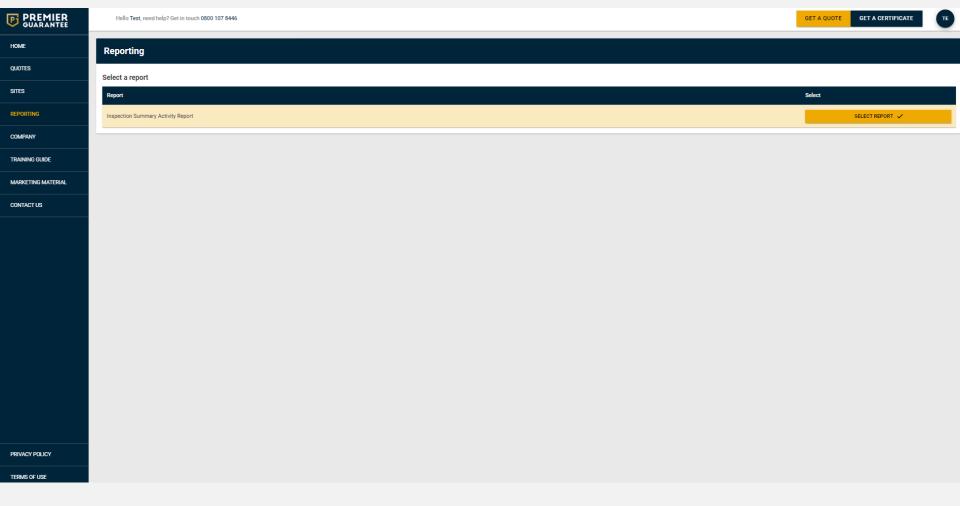
# Reporting

04.





# **Reporting: Developer reporting**

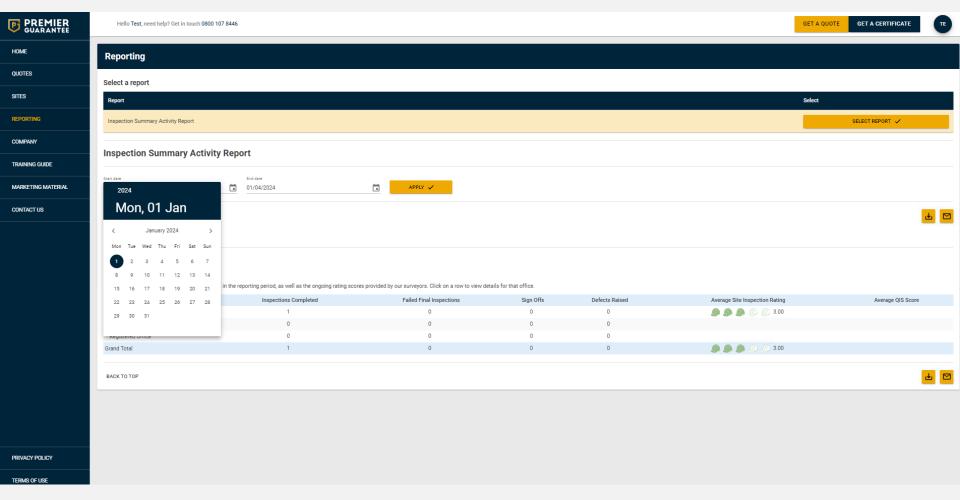


The reporting tab provides access to any relevant reporting that your company has access to. Click the **Select Report** button to open the report screen. Speak to your sales account manager for more details on reporting access.



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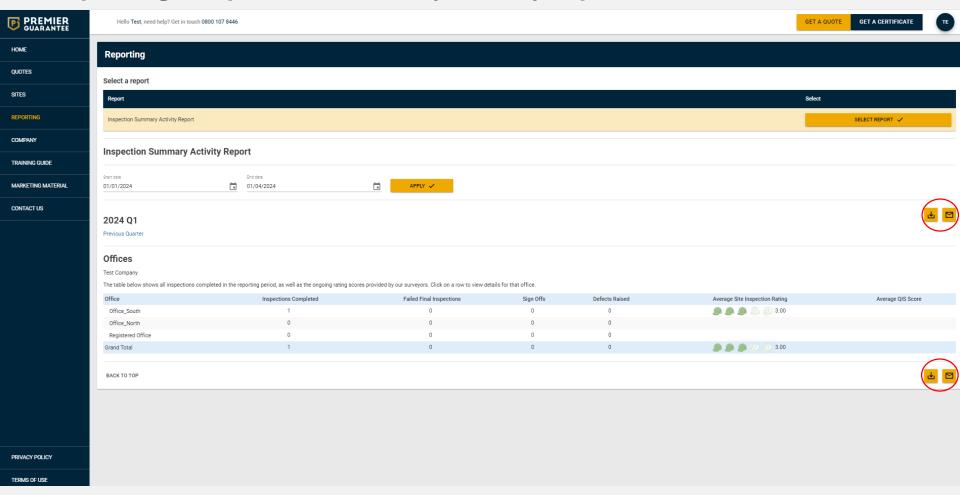
### Reporting: Inspection summary activity report



Select the date range you wish to review using the calendar icons and click the Apply button to generate the report.



#### Reporting: Inspection summary activity report



The download and envelope icons at the top of the report, provide the options to PDF or email the high-level overview to yourself. The same icons at the bottom of the report provide this functionality for the entire report including photos etc. Please note these files will take some time to download due to the file size. Each score can be clicked to expand and provide more detail.

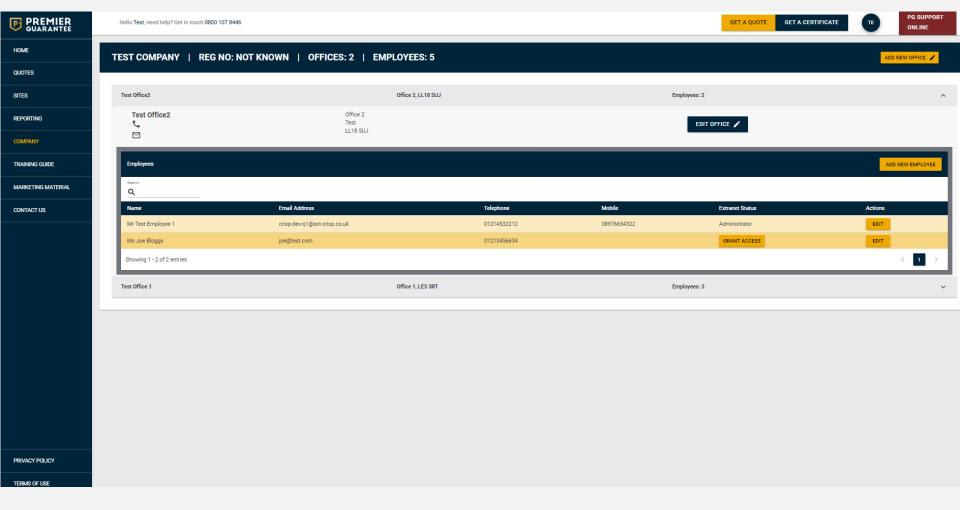


# Company & Access Management

05.



#### **Company: Offices and employees**

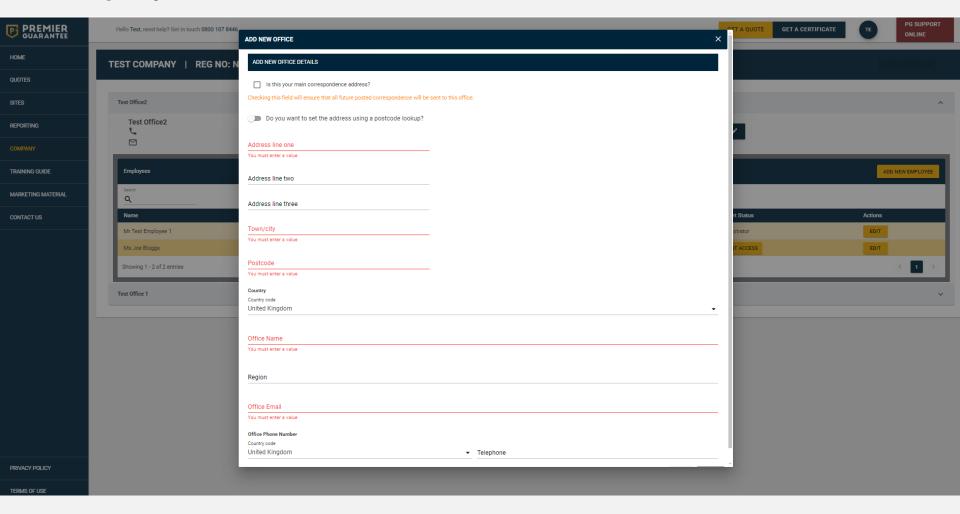


The Company tab provides a summary of the information we hold on your company, office(s) and employees. If you are set up as an Extranet Administrator, you can add a new office by clicking the Add New Office button but you are unable to edit a registered office.



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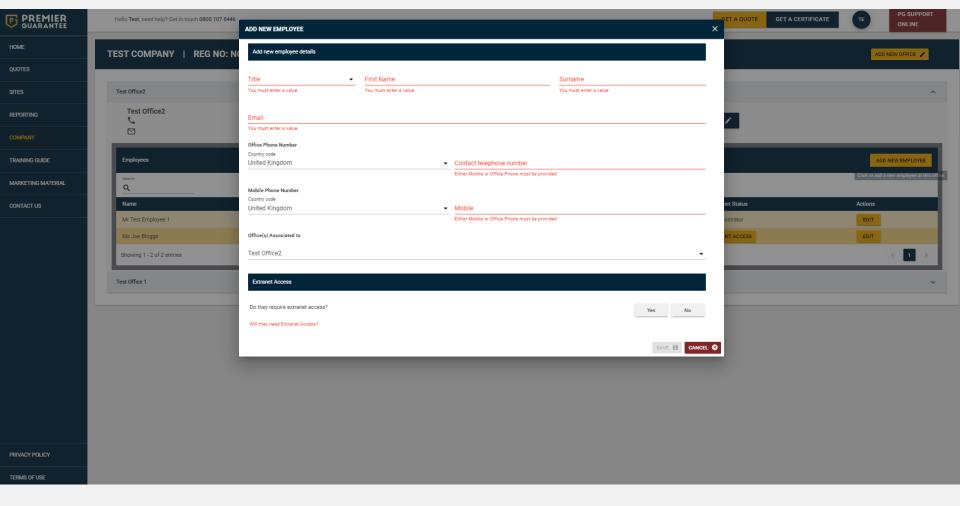
### Company: Add new office



Complete the new office details as required and click Save. The new office will then appear on the Extranet and you will be able to add new employees as required.



#### Company: Add new employee

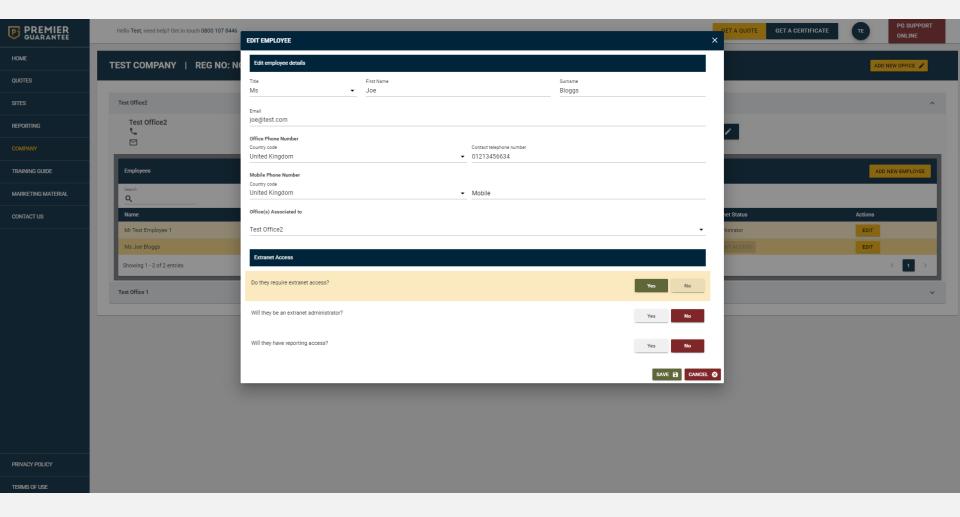


Complete details as required and click Save. The new employee will appear on the Extranet and you can add further employees by clicking the Add New Employee button. You are able to provide Extranet access and set as Extranet Administrator if required.



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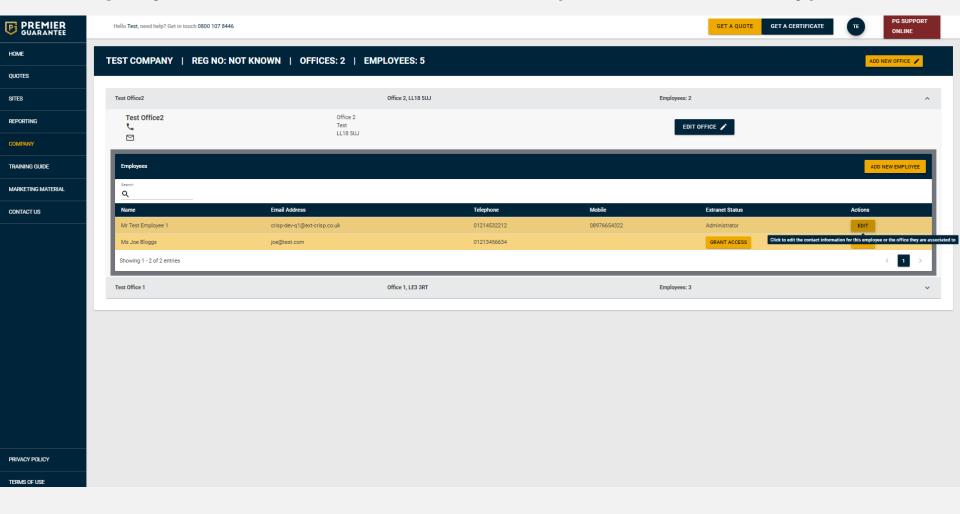
#### **Company: Grant Extranet and reporting access (administrators only)**



Extranet Administrators can give employees Extranet access by clicking the **Grant Access** button. We recommend that a company has more than one Extranet Administrator. This is shown under the **Extranet Status** column.



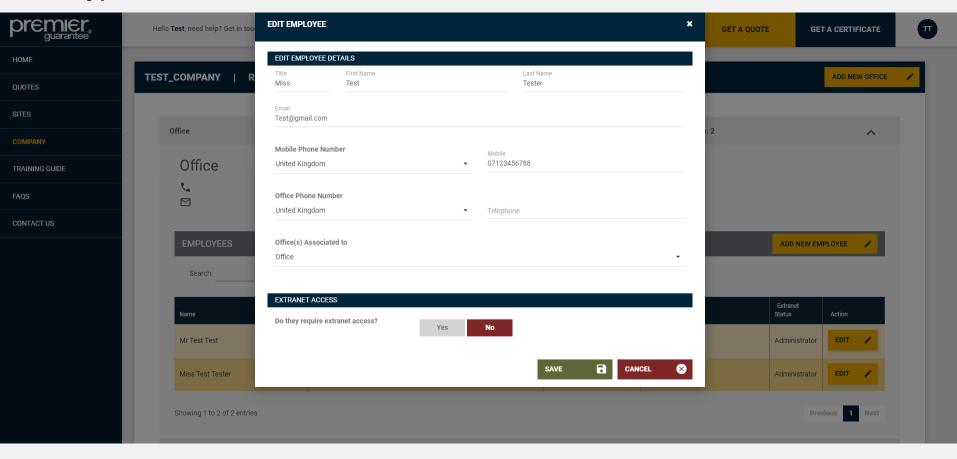
#### Company: Edit/remove Extranet access (administrators only)



Extranet Administrators can withdraw employee Extranet access by clicking the **Edit** button.



# Company: Edit/remove Extranet/reporting access (administrators only)



Change Extranet Access to No and click Save to withdraw access.

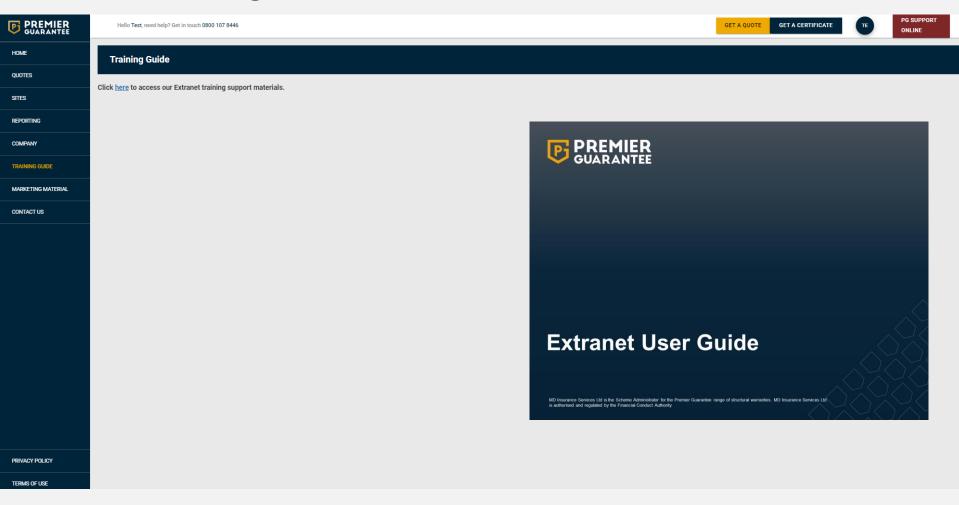


# **Customer Support**

06.



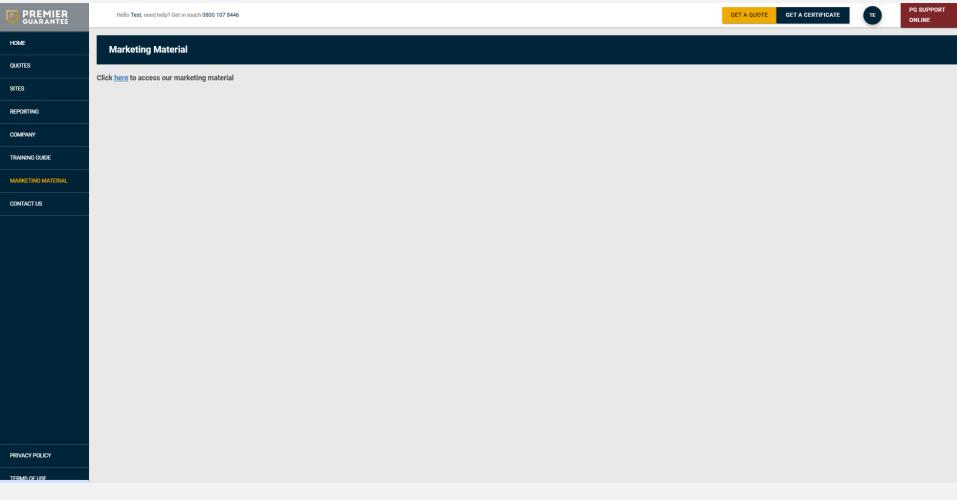
## **Extranet Training**



Additional Extranet training support materials are available via the Training Guide tab on the left hand side or contact your Account Manager or Customer Experience Specialist to arrange further training.



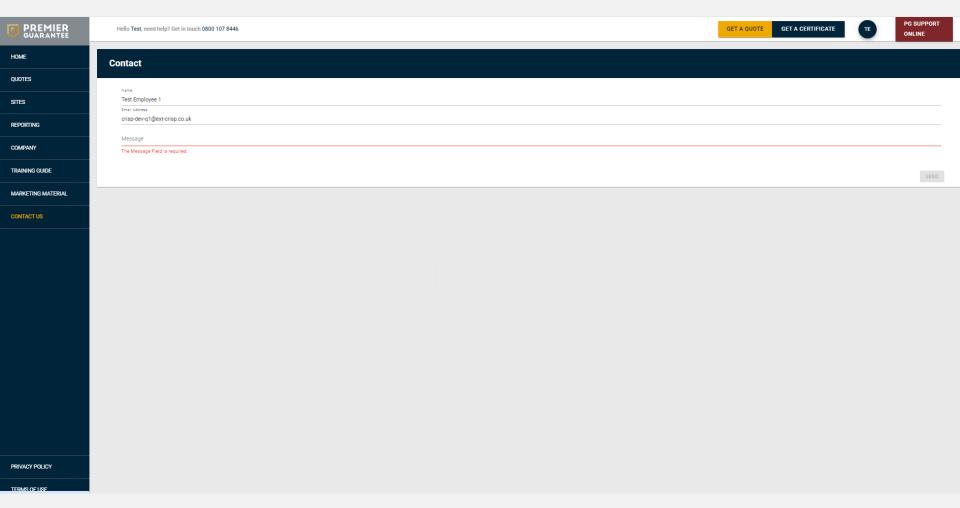
## **Marketing material**



Click here to order from a range of marketing materials from the Premier Guarantee website.



#### **Contact us**



If you have any questions that relates to the Extranet, please contact us using the form provided.





# Thank You

To arrange training call 0151 650 4343