



WEBroker Dashboard



BROKER TRAINING GUIDE

How to Load a Saved Quote With Voyager WEBroker Dashboard

How to Load a Saved Quote on Voyager WEBroker Dashboard



[Click Here](#) to view the video guide version of this training manual.

- 1** To load a previously saved quote – go to “Reports” at the top of your dashboard and then “Quotes”.
 - In the type of search dropdown options select “By Quote Number”.
 - Type in your quote reference number then click “Submit” button.

The screenshot shows the top navigation bar with tabs: Home, Quote and Buy, Reports, Administration, and Help. The 'Reports' tab is selected and highlighted with a red box. A dropdown menu is open under 'Reports', listing options: Find a Policy, Summary, Invoices, Quotes, Annual Renewals, and Renewals Summary. The 'Quotes' option is highlighted with a red box and a red arrow points to it. Below the navigation bar, there are search fields for 'Policy Number', 'Surname', and 'Postcode', along with a 'Find' button. A 'Load screening and open quote engine' button is also visible.




The screenshot shows the 'Report' section with the heading 'Choose the type of lookup:'. A dropdown menu is open, showing options: (Select Type of search), (Select Type of search), By Period, By Month, By Email, By Quote Number, and By Surname. The 'By Quote Number' option is highlighted with a red box and a red arrow points to it.

The screenshot shows the 'Report' section with the heading 'Choose the type of lookup:'. The dropdown menu is now closed, and the selected option 'By Quote Number' is visible. Below this, there is an input field for 'Quote Number:' and a 'Submit' button. A red arrow points from the 'By Quote Number' dropdown to the 'Quote Number' input field, and another red arrow points from the input field to the 'Submit' button.

2

You will have the option to email, print or load the quote.

[Download Data](#)

Voyager Hub - Travel Insurance																
Quote Number	Version	Quote Date	Done By (user)	Status	Taken Up Policy ID	Product	Policy Type	Main Insured Surname	Email Address	Start Date	End Date	Postcode	Price	Blacklisted	Authorised	Actions
	3	01/09/2016 14:34:01		Valid	0	WEBroker 2016	Short Stay			19-09-2016	28-09-2016		23.99	No	Yes	info@actsmartmedia.com   
Totals:													23.99			

email quote

print quote

load quote

- 3** When you load the quote – it will look like you are back at the beginning of the quote system – keep pressing “Next” to get back to the point you left off (or were timed out).
-

IMPORTANT !

Please note that the quotation system will prompt you to ask the questions that need to be answered carefully and correctly by your clients in order that they make a full disclosure of relevant information in accordance with the Consumer Insurance Act. They have a duty to take reasonable care to avoid misrepresenting their circumstances when answering questions. This means ensuring they do not give information to the insurers that they know is untrue or misleading.

These questions relate mainly to the health of those travelling or upon whose health the trip may depend and to any planned participation in sports or activities that may present an increased risk of injury.

You may find it helpful to read the following to your client:

‘Please take reasonable care to answer all the questions honestly and to the best of your knowledge. If you don’t, your policy may be cancelled, or treated as if it never existed, or your claim rejected or not fully paid’.

Product:	WEBroker	?
Policy Cost Details:	{Default - Policy Price}	?



Next ▶