

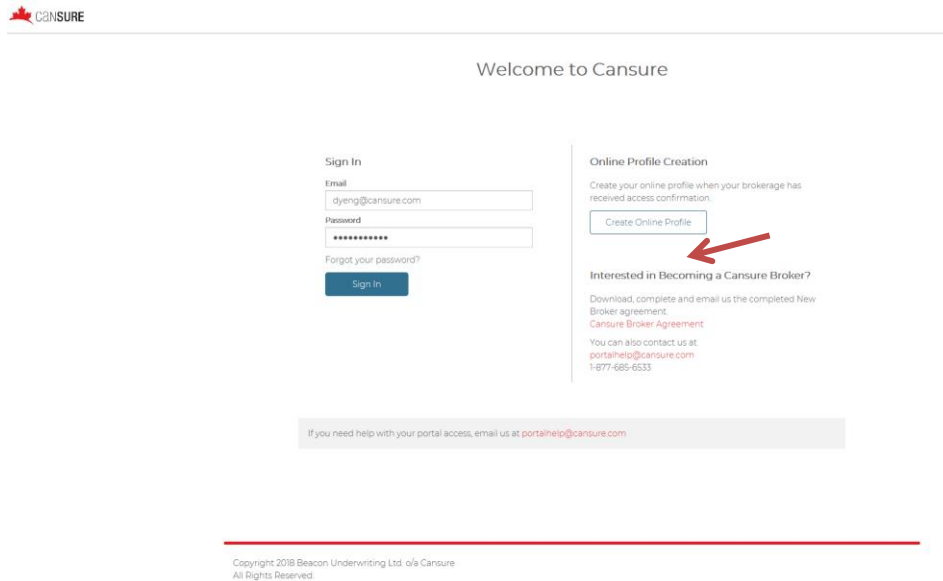


Cansure Portal Quick Start Guide

V.10072019

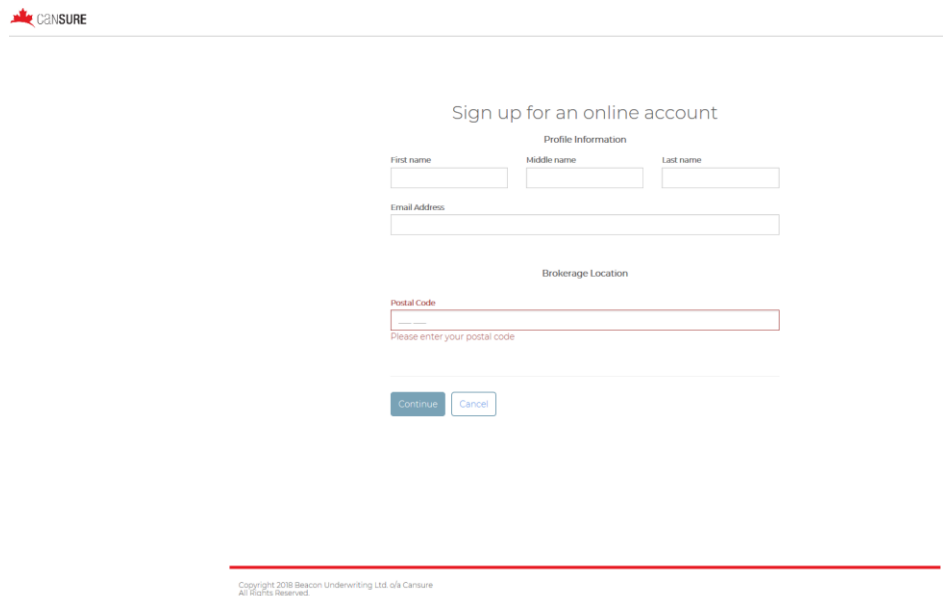
SELF REGISTRATION

1. Type “https://portal.cansure.com” in your address bar of your browser
2. Click the “Create Online Profile” button:



The screenshot shows the CANSURE portal home page. At the top left is the CANSURE logo. The main heading is "Welcome to Cansure". Below this, there are two main sections: "Sign In" and "Online Profile Creation". The "Sign In" section has fields for "Email" (containing ".dyeng@cansure.com") and "Password" (masked with asterisks), a "Forgot your password?" link, and a "Sign In" button. The "Online Profile Creation" section has a "Create Online Profile" button, which is highlighted with a red arrow. Below this, there is a section titled "Interested in Becoming a Cansure Broker?" with a link to download a "Cansure Broker Agreement" and contact information for portalhelp@cansure.com and 1-877-665-6533. At the bottom, there is a footer with the text "Copyright 2018 Beacon Underwriting Ltd. o/a Cansure All Rights Reserved."

3. All fields are required information:
 - The email address must match up with your brokerage email domain address.
 - The postal code field will trigger the location that your profile should be assigned to.



The screenshot shows the "Sign up for an online account" form. The form is titled "Sign up for an online account" and is divided into two main sections: "Profile Information" and "Brokerage Location". The "Profile Information" section has three input fields for "First name", "Middle name", and "Last name", followed by an "Email Address" field. The "Brokerage Location" section has a "Postal Code" field with a red border and a red error message below it that says "Please enter your postal code". At the bottom of the form, there are two buttons: "Continue" and "Cancel". At the bottom of the page, there is a footer with the text "Copyright 2018 Beacon Underwriting Ltd. o/a Cansure All Rights Reserved."

4. After all information is entered, an option to select your office appears.
 - If you work at more than one office location in your brokerage, please use the office location that you are primarily based.



Select your office

Don't see your office? Contact us at portalhelp@cansure.com or call us toll free at 1-877-685-6533

<p>Cansure-test</p> <p>700 West Georgia Street Vancouver, British Columbia V7Y 1A1</p> <p>Select</p>
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5. Additional details are required to complete the registration of your profile.



Your profile

First Name	test
Last Name	test
Email	demo@cansure.com
Phone Number	Extension
Brokerage Name	Cansure-test
Address	700 West Georgia Street Vancouver, British Columbia V7Y 1A1 (604) 539 5318
<p>Continue Cancel</p>	

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6. After you receive this confirmation, you will receive an automatically generated email from info@cansure.com with your temporary password to log in to the portal.



Great! Your request has been submitted. You'll be hearing from us within 24hrs with instructions.

Need a quote right away?
In a rush and need access immediately?



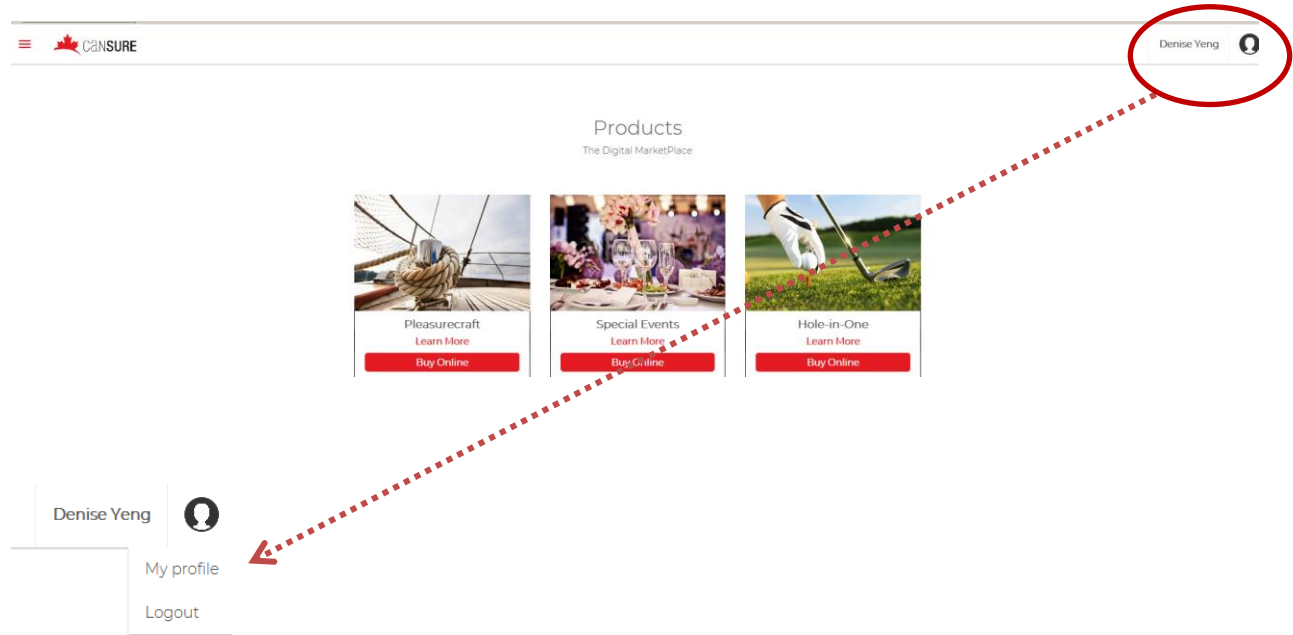
Email us
portalhelp@cansure.com



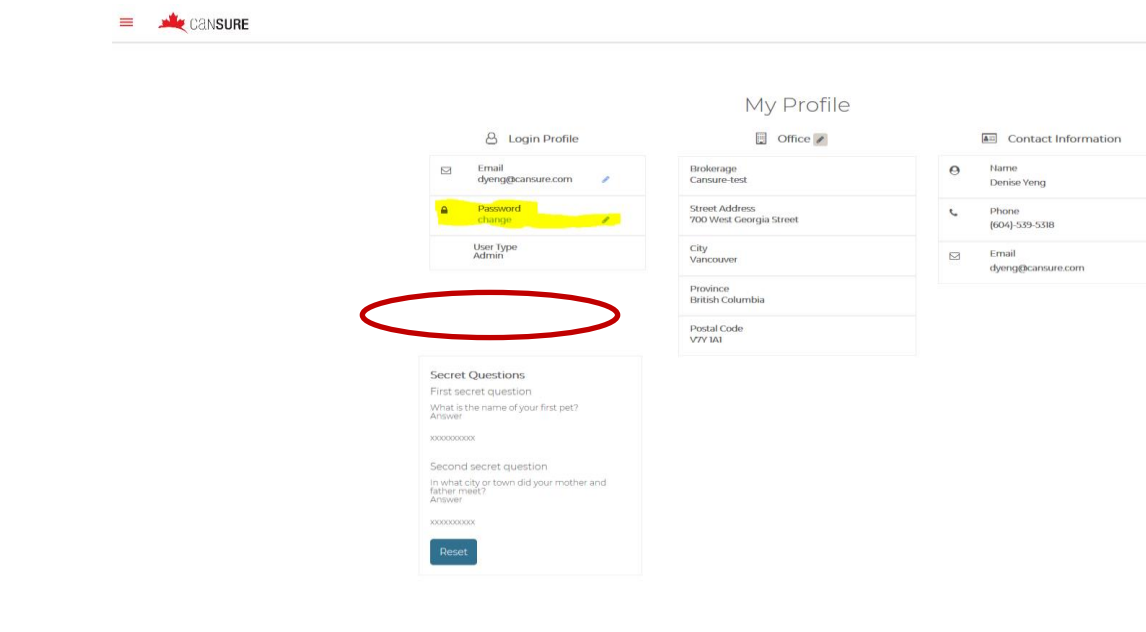
Call us
1-877-685-6533

Editing Your Profile (Password Change)

1. After logging in to the portal using your temporary password, you may change it to a password of your preference by clicking on “My Profile”:



2. You may edit your profile information using the pencil icon, or ‘change’ in the Password box to change your password.



FORGOT PASSWORD

- If you have forgotten your password, you are able to easily retrieve it using the “Forgot Password” link on the login page.

Welcome to Cansure

Chrome Browser provides the best experience when using the Cansure Portal.

Sign In

Email

Password

[Forgot your password?](#)

Online Profile Creation

Create your online profile when your brokerage has received access confirmation.

Interested in Becoming a Cansure Broker?

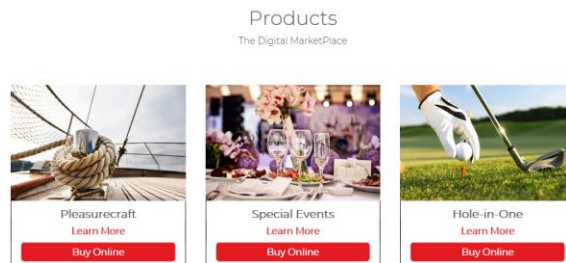
Download, complete and email us the completed New Broker agreement.
[Cansure Broker Agreement](#)

You can also contact us at
portalhelp@cansure.com
1-877-685-6533

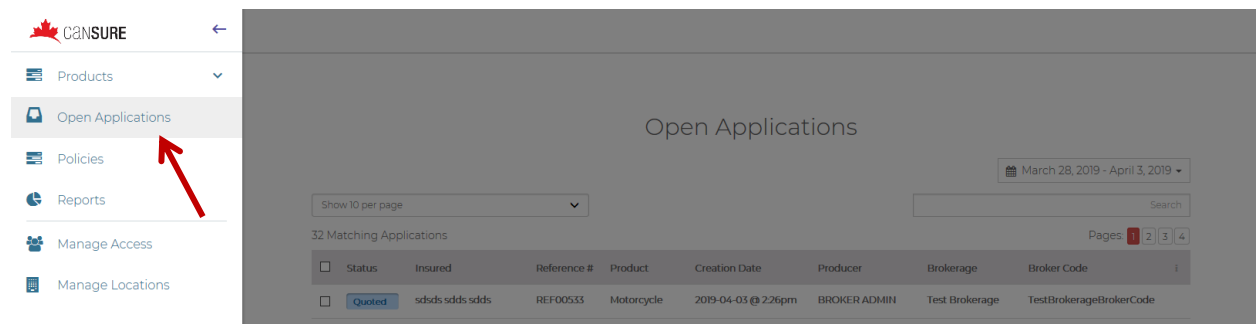
If you need help with your portal access, email us at portalhelp@cansure.com

MANAGING OPEN APPLICATIONS

- After you have started an application, it will automatically be saved under “Open Applications” section in the menu bar (as highlighted below):



- This screen will allow you to view and access all open applications in your brokerage location:



- You may choose to view applications within a specified date range using the calendar feature, or you can also type in the quote number in the Search field (REFxxxxx):

Open Applications

March 28, 2019 - April 3, 2019

Show 10 per page

32 Matching Applications

Status	Insured	Reference #	Product	Creation Date	Producer	Brokerage	Broker Code
<input type="checkbox"/> Quoted	sdsds sdds sdds	REF00533	Motorcycle	2019-04-03 @ 2:26pm	BROKER ADMIN	Test Brokerage	TestBrokerageBrokerCode

- Clicking on the desired Quoted policy will allow you to access the application details and continue to make any changes under “Available Actions”:

← Back to Open Apps

Application

Product	Ride Smart Motorcycle	Reference #	REF00533
Created Date	2019-04-03 @ 02:26pm	Brokerage Office	Test Brokerage 456 Broker Street Edmonton, Alberta TOA 0A1
Created By	BROKER ADMIN		
Broker Phone	(416)-444-4444		
Broker Email	test.broker.admin@brokerlift.com		

Application Details

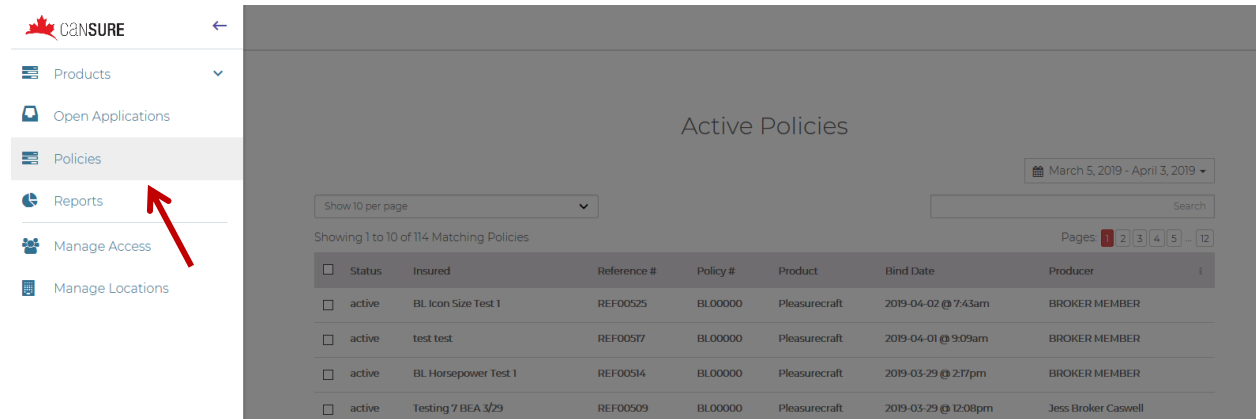
Premium	\$200
Deductible	\$500
Eligibility criteria	Yes
Applicant type	An individual

Available Actions
Make Changes and continue with application

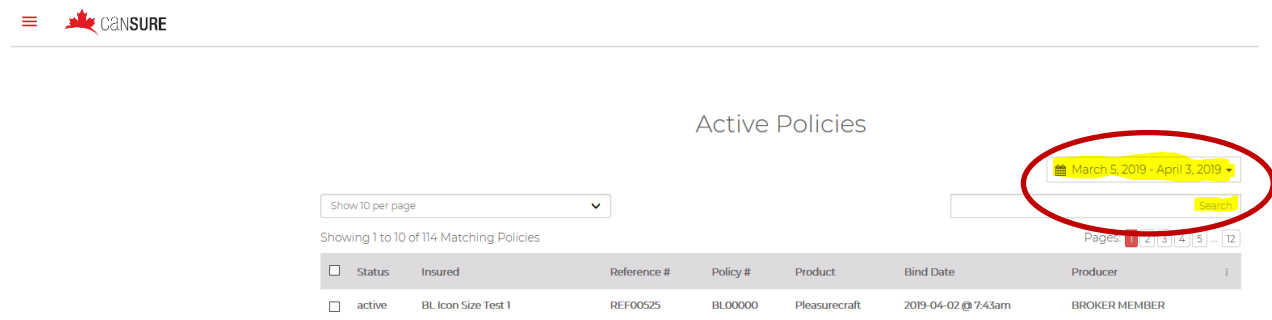
- Once you click on “Make changes and continue with application”:
 - You will be taken back to the application screens to review, confirm, and make edits prior to binding.
 - The screens will be pre-populated with previous information you have entered so you will not need to enter it again.

ACCESSING DOCUMENTS FOR ACTIVE POLICIES

- Once you bind and issue a policy for your client, an email will be sent to you with all policy documents including the wordings. If you would like to access the documents immediately to provide your client, you can access them by clicking “Policies” in the menu:



- Similar to searching for Open Applications, you can also use the Search field to quickly retrieve your client’s policy. Ensure that the desired date range is also amended accordingly as it will impact your search parameters.



- Clicking on the desired policy listed in the table under Active Policies will bring you to a policy detail screen which includes all applicable policy documents available to download or to email your client:



Active Policy

Pleasurecraft & Personal Watercraft

Product	Pleasurecraft & Personal Watercraft	Policy #	BL00000
Name of Insured	test test	Reference #	REF00517
Applicant Address	test test test, Ontario, M5J 1T1	Term	04/26/2019 - 4/26/2020
Phone	900 272 6231	Status	Active
Email	test@tester.com	Bind Date	2019-04-01 @ 09:09am
		Billing Method	Agency Bill

Details

Operator Eligibility Information

First Name	test
Middle Name	
Last Name	test
Date of Birth	18 Nov 1988
Years of Boating Experience	10
Number of Claims	No Claims
Boat intended to be used exclusively for pleasure	Yes

Vessel Information

Vessel Type	Sailboat
Hull Type	Aluminum
Make	aaa
Model	bbb
Year	2019
Length	20 ft 5 in
Total Purchase Price (CAD)	\$20,000
Year Purchased	2019

\$ 831.60	
Total (taxes included)	
Liability Limit	\$4,000,000
Deductible	\$1000
Hull & Machinery	\$20,000
Main Engine 1, Outboard	\$5,000
Trailer 1	\$5,000
Personal Effects	\$12,000

Policy Documents	
Download and save each document.	
Readings	📄
Insurance Policy Invoice	📄
Policy Declaration	📄

NEED ADDITIONAL ASSISTANCE?

If you have any questions or require assistance, please contact your Business Development Representative or send an email to: portalhelp@cansure.com

Product brochures can be found online by visiting: www.cansure.com/brochures/