



Arthur J. Gallagher



RAC Broker Portal User Guide

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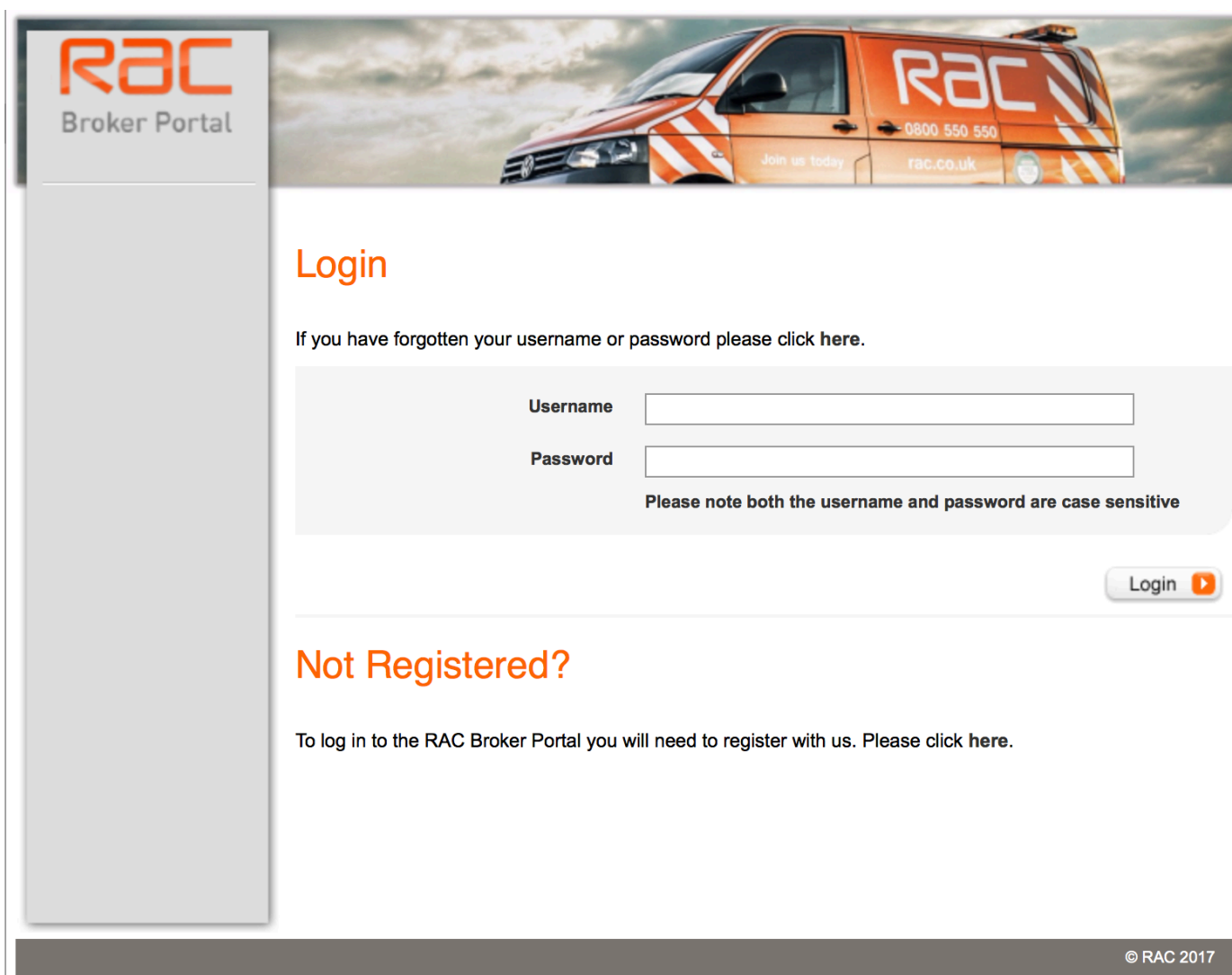
Login

Click this link:

<https://portal.racbusinessolutions.com/brokerportal/login.jsp>

Login with your username and password – this will have been supplied to you previously. Please endeavour to remember this password.

You will also be required to update this password on a regular basis for security reasons – please ensure you do this when prompted otherwise you will require a password reset.



RAC
Broker Portal


Login

If you have forgotten your username or password please click [here](#).

Username

Password

Please note both the username and password are case sensitive

Login 

Not Registered?

To log in to the RAC Broker Portal you will need to register with us. Please click [here](#).


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New Quotation

Step 1

If not already on the correct screen, click 'New Quotation';
Insert Vehicle Registration, Customer Details and Cover Start Date.

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New Quotation
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Quote Details

Please answer all the questions below:

Vehicle Details

Registration Number * [Find My Vehicle](#)

Personal Details

Title *

Forename *

Surname *

Enter an address or a postcode to search for your address

Address 1 *

Address 2

Address 3

Address 4

Address 5

Postcode *

Telephone

Email

Cover Details

Cover Start Date *

Cover End Date

[Cancel](#) [Next](#)

New Quotation


Step 2

Select Your Vehicle Type.

Select Cover Level, and input the desired sell out price. Note – this 'Consumer Price' is inclusive of IPT.

Click 'Buy' on the appropriate cover option.

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Reference: **QTE00000856** Cover start date: **08/12/2017** Cover end date: **07/12/2018**
Status: **Quote** Customer name: **Mr Joe Bloggs** Agency Reference: **00AJG001**

Cover Details

The following cover options can be selected

Car	Bike	Van	Minibus	Taxi Car	Taxi Minibus	Motorhome	Courier	Classic Car
Cover <input type="checkbox"/>								
Roadside, Recovery, At Home, Onward Travel		£30.00	£33.60 - £84.99	<input type="text"/>	<input type="button" value="Buy"/>			
Roadside, Recovery, At Home, Onward Travel, European Cover		£55.00	£81.60 - £119.99	<input type="text"/>	<input type="button" value="Buy"/>			

The sum due and payable to RAC by the Broker in respect of each sale of the Products shall include, in addition to the Broker Price, a sum equal to the IPT tax liability due within Customer Price ("IPT Payment"). The IPT Payment shall be payable to RAC together with the Broker Price as set out in section 4 of your RAC contract.



Refer contract T&Cs' for full acceptable vehicle criteria and exclusions.

Please note that once cover is confirmed, a refund will only be given if the policy is cancelled within 14 days of the cover start date and no call out has been made

New Quotation

Step 3

Check details are correct and click download schedule.





Reference: RAC00000856	Cover start date: 08/12/2017	Cover end date: 07/12/2018
Status: Active	Customer name: Mr Joe Bloggs	Agency Reference: 00AJG001

Cover Confirmation


Cover Summary

Registration Number	<input type="text" value="RK17ZZO"/>
Cover Level	<input type="text" value="Roadside, Recovery, At Home, Onward Travel"/>
Agreement Code	<input type="text" value="AJG004"/>
Consumer Price	<input type="text" value="£40.00"/>
IPT Amount	<input type="text" value="£4.29"/>

Do not forget to download the policy summary and terms and conditions documentation from the links on the left hand side

[Download Schedule](#)  [Finish](#) 

*This will open a PDF file of a cover note for your customer



AJG - CDI System Group, 43-47 Bank Street, Irvine, Ayrshire, KA12 0LN

Your RAC Rescue Policy Schedule
Your Policy Number: RAC00000856
Name: Mr Joe Bloggs
Address: M, 147 Stanley Road, Teddington, TW11 8UF
Period of Cover: from: 08 December 2017 to: 07 December 2018

Cover details:

Make	AUDI
Model	A3 S LINE BLACK EDITION T
Registration Number	RK17ZZO
Cover Provided	Roadside, Recovery, At Home, Onward Travel
Annual Premium	£40.00 <small>This figure includes Insurance Premium Tax where applicable</small>
Cover Number	AJG004

(See Policy Summary and Terms Conditions for full details)

Any queries?

If you have any queries or need to advise us of any changes to your policy, please contact your insurance adviser whose details are shown above.

Service sold through Arthur J. Gallagher, The Watbrook Building, 25 Watbrook, London, EC6N 8RW. Authorised and regulated by the Financial Conduct Authority. Provided by RAC Motoring Services Registered No. 01424389 and/or RAC Insurance Ltd. Registered No. 325524. Registered in England. Registered Office: RAC House, Brookwood Crescent, Woking, RG26 4HR. RAC Motoring Services is authorised and regulated by the Financial Conduct Authority. RAC Insurance Ltd is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

New Quotation

Step 4

See summary and Ts and Cs here for downloading and sending to customer.

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Policy Summary

Please click on the links below to download Policy Summaries for the various products:

- Car
- Bike
- Van
- Minibus
- Taxi Car
- Taxi Minibus
- Motorhome
- Courier
- Classic Car

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Terms and Conditions

Please click on the links below to download Terms and Conditions for the various products:



- Car
- Bike
- Van
- Minibus
- Taxi Car
- Taxi Minibus
- Motorhome
- Courier


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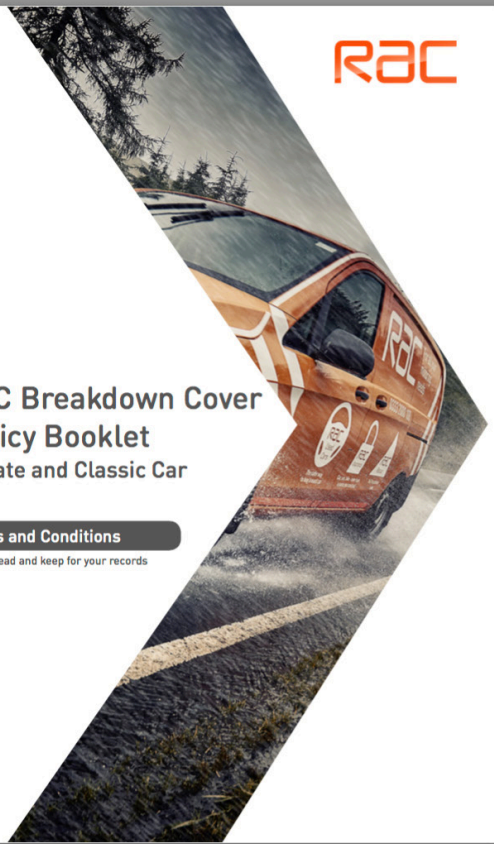
RAC Breakdown Cover

Private and Classic Car

Key Facts
PLEASE READ AND KEEP FOR YOUR RECORDS





RAC Breakdown Cover

Policy Booklet

Private and Classic Car

Terms and Conditions

Please read and keep for your records

Contact information


	Telephone	In Writing
Breakdown	0330 159 8622	
Breakdown in Europe		
Calling from Europe	00 33 472 45 52 55*	
Calling from a French Landline (freephone)	0800 290 112	
Calling from the Republic of Ireland (freephone)	1 800 535 005	
Bringing your vehicle back to the UK after a breakdown	0330 159 0342	
Claim Form Requests		europeanclaims@rac.co.uk
From the UK	0330 159 0334	www.rac.co.uk/ europeanclaimform
From Europe	0044 161 332 1040*	


New Quotation

Step 5

Click "Finish".

You have now successfully purchased RAC Breakdown Cover for your customer.

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Reference: **RAC00000856** Cover start date: **08/12/2017** Cover end date: **07/12/2018**
Status: **Active** Customer name: **Mr Joe Bloggs** Agency Reference: **00AJG001**

Cover Confirmation

Cover Summary

Registration Number	<input type="text" value="RK17ZZO"/>
Cover Level	<input type="text" value="Roadside, Recovery, At Home, Onward Travel"/>
Agreement Code	<input type="text" value="AJG004"/>
Consumer Price	<input type="text" value="£40.00"/>
IPT Amount	<input type="text" value="£4.29"/>

Do not forget to download the policy summary and terms and conditions documentation from the links on the left hand side

[Download Schedule](#)  [Finish](#) 

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Mid-Term Adjustments/ Policy Administration

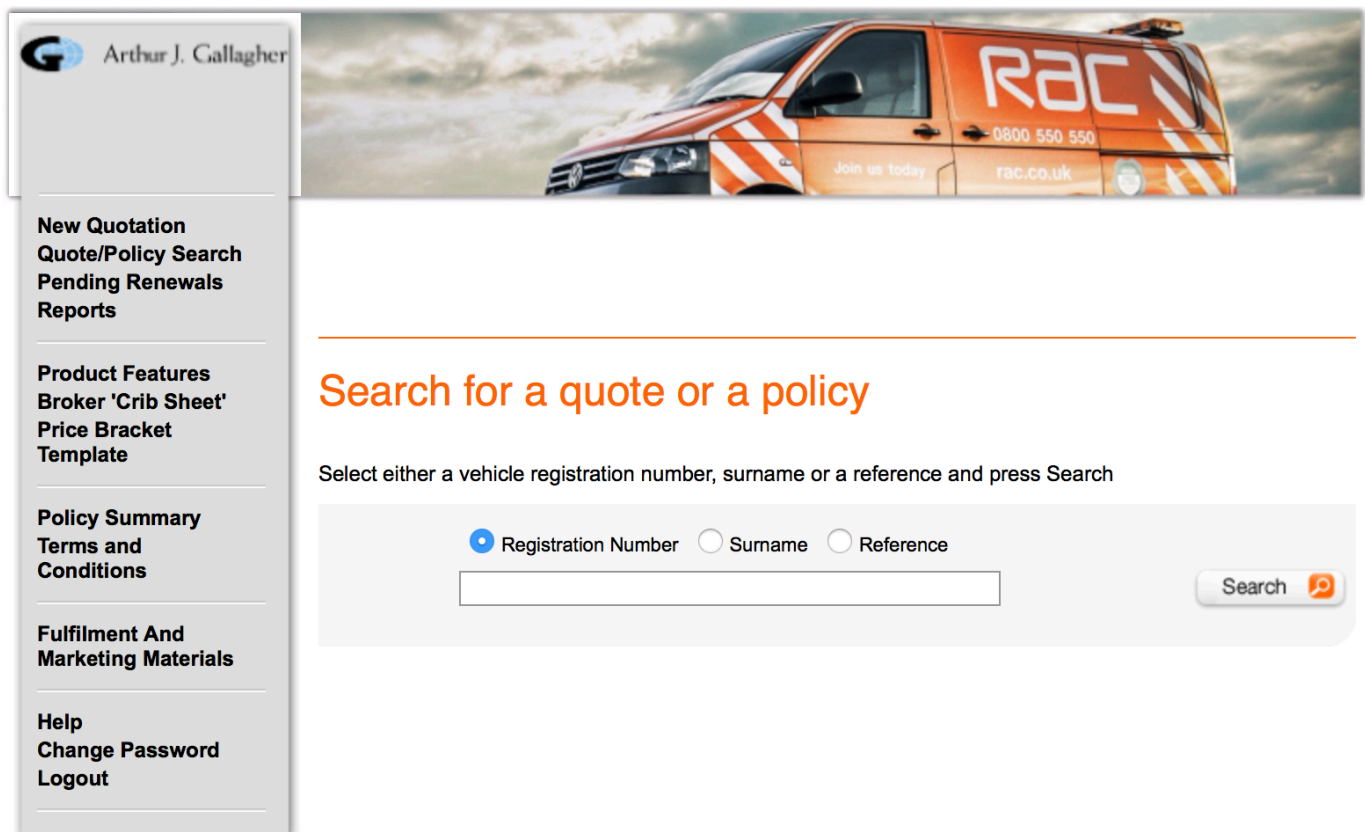
Step 1

Go to the main menu within the Broker Portal
Select 'Quote / Policy Search'

Step 2

Search for the policy you are looking to amend by typing in either of the following options:

- Registration Number
- Surname
- Policy Reference





The screenshot shows the RAC Broker Portal interface. On the left is a navigation menu for Arthur J. Gallagher, with categories like 'New Quotation', 'Product Features', 'Policy Summary', 'Fulfilment And Marketing Materials', and 'Help'. The main content area features a header with an RAC van image and the text 'Search for a quote or a policy'. Below this, it instructs users to 'Select either a vehicle registration number, surname or a reference and press Search'. A search form contains three radio buttons: 'Registration Number' (selected), 'Surname', and 'Reference'. A text input field is positioned below these buttons, and a 'Search' button with a magnifying glass icon is on the right.

Mid-Term Adjustments/ Policy Administration

Step 3

The Portal will then provide a list of policies to choose from. Select the appropriate policy by clicking 'Select'

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Search for a quote or a policy

Select either a vehicle registration number, surname or a reference and press Search

Registration Number Surname Reference

Click 'select' to view a Quote or Policy

Reference	Registration Number	Customer Name	Cover Start	Cover End	Status	
RAC00000856	RK17ZZO	Mr Joe Bloggs	08/12/2017	07/12/2018	Active	select
RAC00000855	RK17ZZO	Mr chris John	06/12/2017	06/12/2017	Cancelled	select
RAC00000809	RK17ZZO	Admiral john smith	07/11/2017	07/11/2017	Cancelled	select
RAC00000814	RK17ZZO	Admiral john smith	07/11/2017	06/11/2018	Active	select

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Mid-Term Adjustments/ Policy Administration

Step 4

Select the appropriate option from the available administration adjustments provided.

To make an amendment to the policy, click the 'Adjust' button. Amend the required details on the policy screen and click 'Confirm'.

*Please note, you cannot amend the level of cover or the policy length at the current time.

The screenshot displays a web-based policy administration interface. It features a sidebar on the left and a main content area with several sections:

- Year Of Manufacture:** A text input field containing the value "2017".
- Cover Details:** A section containing several text input fields:
 - Cover Effective Date: 08/12/2017
 - Cover End Date: 07/12/2018
 - Cover Level: Roadside, Recovery, At Home, Onward Travel
 - Agreement Code: AJG004
 - Motor Policy Insurer: Unknown
 - Transaction Date: 08/12/2017Below these fields are two buttons: "History" and "Reprint schedule", both with right-pointing arrow icons.
- Price Details:** A section containing three text input fields:
 - Price to Broker: £30.00
 - Consumer Price: £40.00
 - IPT Amount: £4.29

At the bottom of the interface, there are three buttons: "Back" (left-pointing arrow), "Cancel cover" (cross icon), and "Adjust" (right-pointing arrow). The "Adjust" button is highlighted with a red rectangular box.

Mid-Term Adjustments/ Policy Administration

Step 5

Select the appropriate fields from the available administration adjustments provided.

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Status: **Active** Date: 08/12/2017 Date: 07/12/2018
Customer name: **Mr Joe Bloggs** Agency Reference: **00AJG001**

Adjust Policy

Search / Policy Details / Adjust Policy

Vehicle Details

Registration Number * [Find My Vehicle](#)

Make

Model

Year Of Manufacture

Is the vehicle over 6.4 metres? No Yes

Personal Details

Title *

Forename *

Surname *

Enter an address or a postcode to search for your address

Address 1 *

Address 2

Address 3

Address 4

Address 5

Postcode *

Telephone

Email

Cover Details

Effective Date *

Cover End Date

Cover Level

Agreement Code

Changes to this policy cannot be processed prior to this effective date

[Back](#) [Confirm](#)

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New Quotation
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Reference: **RAC00000856** Cover start date: **08/12/2017** Cover end date: **07/12/2018**
Status: **Active** Customer name: **Mr Joe Bloggs** Agency Reference: **00AJG001**

Adjustment Confirmed

Search / Policy Details

Vehicle and/or personal details have been adjusted as requested

[Download Schedule](#) [Finish](#)

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Cancellation

Step 1

To cancel the policy, click the 'Cancel cover' button.

The screenshot displays a web interface for managing a policy. It features several sections: 'Year Of Manufacture' with a value of 2017; 'Cover Details' including 'Cover Effective Date' (08/12/2017), 'Cover End Date' (07/12/2018), 'Cover Level' (Roadside, Recovery, At Home, Onward Travel), 'Agreement Code' (AJG004), 'Motor Policy Insurer' (Unknown), and 'Transaction Date' (08/12/2017); and 'Price Details' including 'Price to Broker' (£30.00), 'Consumer Price' (£40.00), and 'IPT Amount' (£4.29). At the bottom, there are buttons for 'Back', 'Cancel cover' (highlighted with a red box), and 'Adjust'. A footer contains links for 'Terms & Conditions', 'Privacy Policy', 'Compliance Statement', and 'Feedback/Help', along with the copyright notice '© RAC 2017'.

Year Of Manufacture	2017	
Cover Details		
Cover Effective Date	08/12/2017	
Cover End Date	07/12/2018	
Cover Level	Roadside, Recovery, At Home, Onward Travel	
Agreement Code	AJG004	
Motor Policy Insurer	Unknown	
Transaction Date	08/12/2017	
History ▶ Reprint schedule ▶		
Price Details		
Price to Broker	£30.00	
Consumer Price	£40.00	
IPT Amount	£4.29	
Back ◀	Cancel cover ✕	Adjust ▶

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Cancellation

Step 2

Choose reason from drop down box;

- If within 14 days, select has RAC been called out Yes or No
- If no - possible refund
- Yes - no refund
- Over 14 days - no refund

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Reference: **RAC00000856** Cover start date: **08/12/2017** Cover end date: **07/12/2018**
Status: **Active** Customer name: **Mr Joe Bloggs** Agency Reference: **00AJG001**

Cancel Policy

Search / Policy Details / Cancel Policy

Cancellation Details

Cover will be cancelled from today

Has the RAC been called out? * Yes No

If callouts have been made no refund is possible

Cancellation Reason * **Vehicle sold and not replaced**

[Back](#) [Confirm](#)

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Reference: **RAC00000856** Cover start date: **08/12/2017** Cover end date: **08/12/2017**
Status: **Cancelled** Customer name: **Mr Joe Bloggs** Agency Reference: **00AJG001**

Cancellation Confirmed

Search / Policy Details

This policy has been cancelled with a full refund of £40.00


[Download Schedule](#) [Finish](#)


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Cancellation

Step 3

No refund possible as after 14 day cooling off period.

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Reference: **RAC00000814** Cover start date: **07/11/2017** Cover end date: **06/11/2018**
Status: **Active** Customer name: **Admiral john smith** Agency Reference: **00AJG001**

Cancel Policy

[Search](#) / [Policy Details](#) / [Cancel Policy](#)

Cancellation Details

Cover will cancelled from today

This policy has been active for more than 14 days, no refund is possible

Cancellation Reason *

[Back](#)


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Cancellation

Step 4

RAC has been called out.

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Reference: **RAC00000856** Cover start date: **08/12/2017** Cover end date: **07/12/2018**
Status: **Active** Customer name: **Mr Joe Bloggs** Agency Reference: **00AJG001**

Cancel Policy

Search / Policy Details / Cancel Policy

Cancellation Details

Cover will be cancelled from today

Has the RAC been called out? * Yes No


If callouts have been made no refund is possible

Cancellation Reason *

[Back](#) [Confirm](#)

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Reference: **RAC00000857** Cover start date: **08/12/2017** Cover end date: **08/12/2017**
Status: **Cancelled** Customer name: **Miss r blay** Agency Reference: **00AJG001**

Cancellation Confirmed

Search / Policy Details

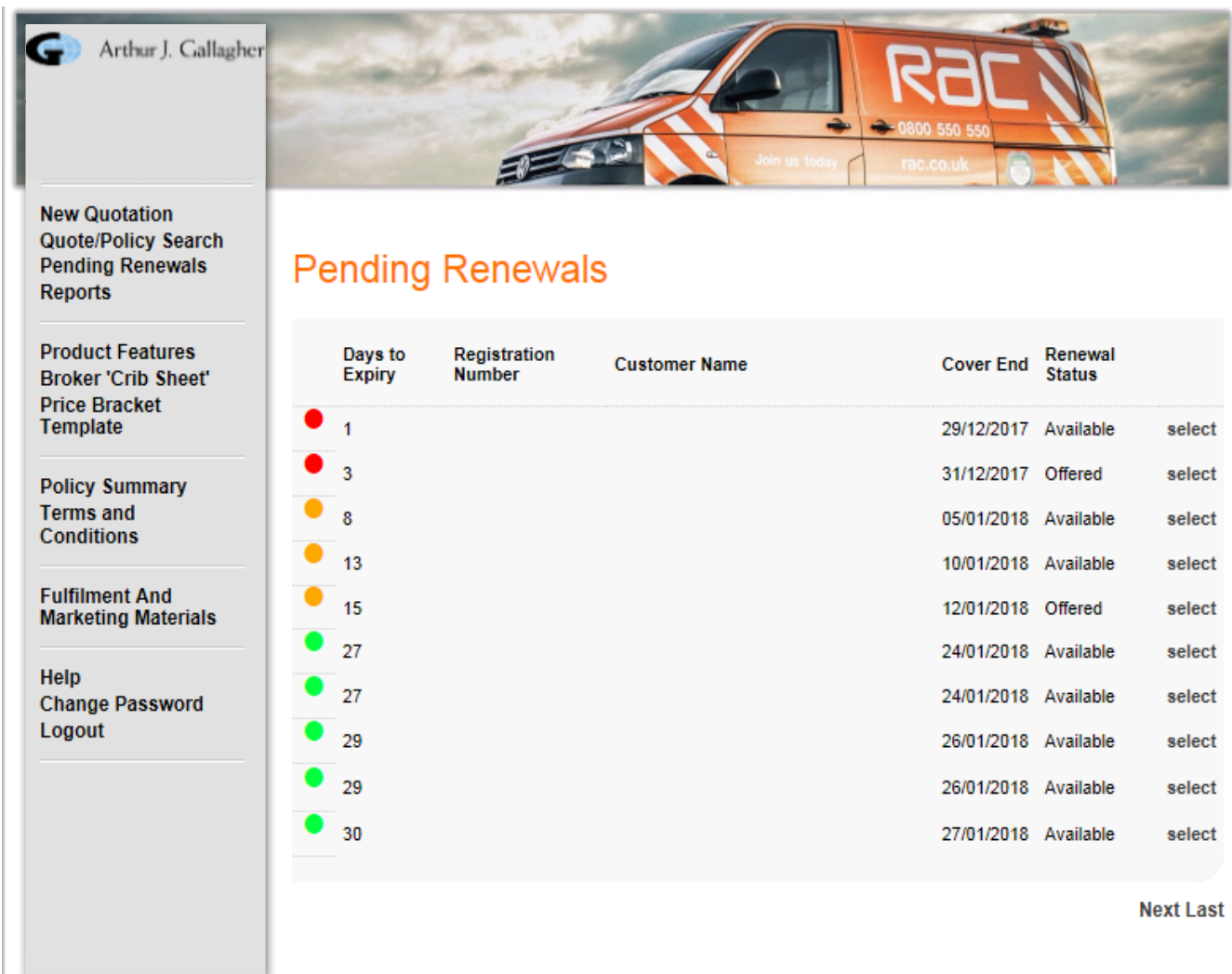
This policy has been cancelled with no refund

[Download Schedule](#) [Finish](#)

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Renewals

From the main menu in the portal, select 'Pending Renewals'. This will display a list of policies available for renewal within the next 42 days. Select the appropriate policy and follow the relevant steps to renew the policy.



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Pending Renewals

Days to Expiry	Registration Number	Customer Name	Cover End	Renewal Status	
1			29/12/2017	Available	select
3			31/12/2017	Offered	select
8			05/01/2018	Available	select
13			10/01/2018	Available	select
15			12/01/2018	Offered	select
27			24/01/2018	Available	select
27			24/01/2018	Available	select
29			26/01/2018	Available	select
29			26/01/2018	Available	select
30			27/01/2018	Available	select

Next Last

Reports

From the main menu in the portal, select 'Reports'. This will then display a list of available reports.

RAC

Broker Cancellation Report

Broker AJG - CDL System Group **Reporting Period** November 2017

Cancellation Volume	Cancellation < 14 full refund	Cancellation < 14 no refund	Consumer Price	IPT	Price to Broker	Amount Payable
4	3	1	-£ 311.00	-£ 33.32	-£ 122.00	-£ 155.32

Product Features and Crib Sheet


From the main menu in the portal, select 'Product Features' or 'Crib Sheet'.

You can choose the crib sheet you wish to view and download.

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- Product Features
- Broker 'Crib Sheet' Price Bracket Template
- Policy Summary Terms and Conditions
- Fulfillment And Marketing Materials
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Broker Crib Sheets

Please click on the links below to download Crib Sheets for the various products:

- Car
- Bike
- Van
- Minibus
- Taxi Car
- Taxi Minibus
- Motorhome
- Courier
- Classic Car






Car Crib Sheet

Cover: Things to Remember


Features of RAC Breakdown Cover	Roadside	Recovery	At Home	Onward Travel	European Rescue
Roadside repairs if your vehicle is more than 1/4 mile from your home address	Yes	Yes	Yes	Yes	Yes
Recovery service to a repairer	Yes	Yes	Yes	Yes	Yes
Transport of you and your vehicle to your destination in the UK*	No	Yes	Yes	Yes	Yes
Service at your door if your vehicle breaks down at home	No	No	Yes	Yes	Yes
Use of a hire car** for up to 2 days whilst your vehicle is fixed, alternative transport or overnight accommodation	No	No	No	Yes	Yes
Covers the vehicle in 48 countries and their off shore islands in continental Europe	No	No	No	No	Yes
If you've put the wrong fuel in your car, call us and we will send help to drain, flush and clean out the fuel system and add up to 10 litres of fuel to get you on your way	Yes	Yes	Yes	Yes	No

*At Home To make new only**Hire car for 21 years old and over



Fulfilment and Marketing Materials

From the main menu in the portal, select 'Fulfilment and Marketing Materials' - choose the item you would like and follow the on screen instructions.



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Fulfilment And Marketing Materials

The following items of Fulfilment and Marketing are available:

- RAC Customer Leaflet
- RAC UK Membership Card
- RAC European Card
- RAC Card Stand

If you wish to order any of these items, please email brokersupport@rac.co.uk or, contact us on 0330 159 0522. Please include the following details:

- the name of each item
- the number required of each item
- your name and contact details if we need to discuss any aspect of your order
- the contact name and address for delivery

Contact

If you have any queries regarding the portal or policy administration queries please contact us using the below details:

Brokersupport@rac.co.uk

03301590522

