

SPGC PORTAL USER GUIDE

Creating Your Account



The Cansure Portal is now the SPGC Portal!

Email address

nahuja@spgcanada.ca

Password

.....

Sign In

First time here? [Forgot Password? Click here.](#)

Need a password reset? Creating a new account? Upgrading your old log in credentials? Click this link to get started!

Our Brands



Subscribe to our newsletter.

Get portal and product announcements and more.

Subscribe to us



Interested in becoming an SPGC Broker?

Complete and submit your broker agreement.

Download agreement

Click here to subscribe to all upcoming news and product updates from Cansure and Beacon an i3, including product training session announcements!

Brokerages who have not worked with our SPGC MGA brands before can click here to find our broker trading agreement in order to gain access to the portal.

Send completed agreements to portalhelp@spgcanada.ca, and we can help get you started with us!

Creating Your Account



Login Assist

Enter your email address and instructions will be emailed to you.

[Return to the Sign in page](#)

Step 1: Fill out your email address associated to your previous log in and check your email for your next step.



✔ You should receive an email shortly to the provided address, assuming it matches our rules for account setup. Please contact your administrator if you don't receive an email as expected. ✕

Step 2: Wait for this green banner to appear, this will be your indication that the validation email was sent to your inbox. Don't see a banner or can't locate the email? Please check all security functions such as Mimecast, Spam, and Junk.

If there is any errors during this process, please email portalhelp@spgcanada.ca.



Creating Your Account



Confirm Account

It's great to meet you.

Before diving in, let's get your account details in order.

Email: nitasha1997@gmail.com

First Name

This field is required.

Last Name

Password policy:

- A minimum of 12 characters.
- One uppercase alphabetic character.
- One lowercase alphabetic character.
- One number.
- Spaces are not allowed.

Password



Confirm Password



Continue

Step 4: Once you are back on to the platform, you will be redirected to this page. Confirm your account details by completing this form

Hot Tip: When creating a password, make sure you are following the criteria below:

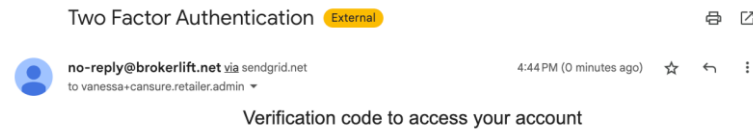
- A minimum of 12 characters.
- One uppercase alphabetic character.
- One lowercase alphabetic character.
- One number.
- Spaces are not allowed.

MFA – Multi Factor Authentication

We have introduced a new security feature to the Cansure Portal by implementing Multi-Factor Authentication (MFA) requirements.

1. MFA will be triggered if you are a first-time user **or** if the user's IP address has changed since the last login.
2. When MFA is triggered, an email is sent to your email address with a code.
3. You will need to retrieve the code from the email and return to the browser window that you were using and enter the code provided.

Step 5: Complete MFA



Two-Factor Authentication Code

Hello Vanessa Cansure Carrier Retailer Admin,

Please use the following code to complete your login:

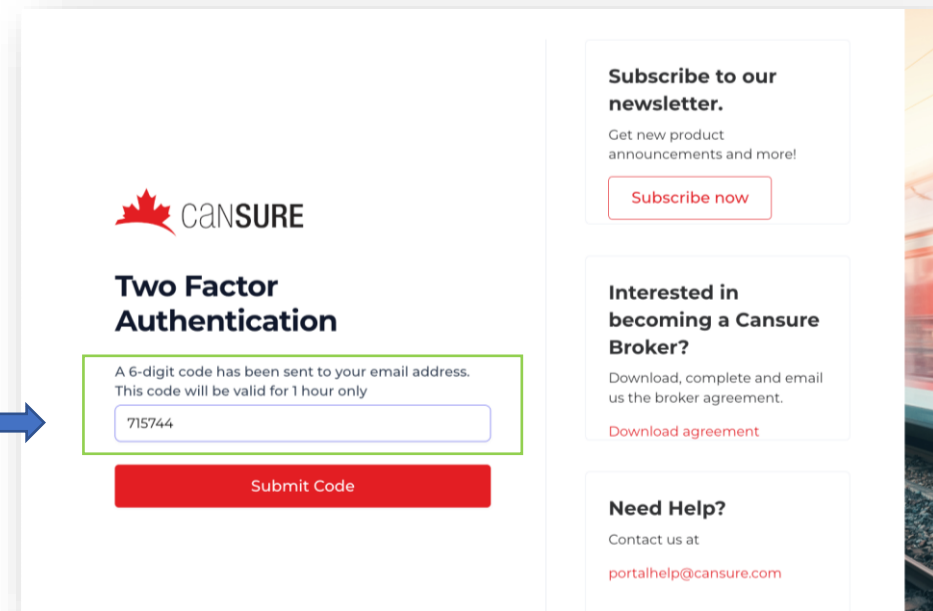
Verification Code: 715744

Please use the following verification code within next 1 hours to verify account.

If you have not tried to sign into your account recently, please change your password immediately to protect the security of your information.

Please do not reply to this email

This email and any files transmitted with it are confidential and intended solely for the use of the individual or entity to whom they are addressed. If you have received this email in error please notify the system manager. This message contains confidential information and is intended only for the individual named. If you are not the named addressee you should not disseminate, distribute or copy this email. Please notify the sender immediately by email if you have received this email by mistake and delete this email from your system. If you are not the intended recipient you are notified that disclosing, copying, distributing or taking any action in reliance on the contents of this information is strictly prohibited.



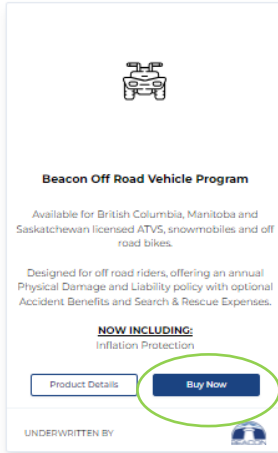
Congrats, you have now successfully signed up
to SPGC Portal!

Now let's look at the new features and
functionality.

Products Page

Products **Personal** Commercial

Change product selection from Commercial to Personal to help navigate you directly to the products that you need.



Beacon Off Road Vehicle Program

Available for British Columbia, Manitoba and Saskatchewan licensed ATVs, snowmobiles and off road bikes.

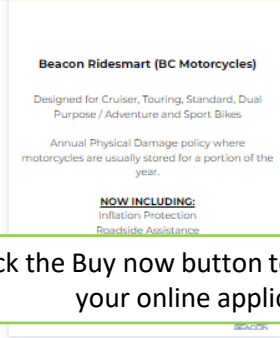
Designed for off road riders, offering an annual Physical Damage and Liability policy with optional Accident Benefits and Search & Rescue Expenses.

NOW INCLUDING:
Inflation Protection

Product Details Buy Now

UNDERWRITTEN BY

Click the Buy now button to be directed to your online application.



Beacon Ridesmart (BC Motorcycles)

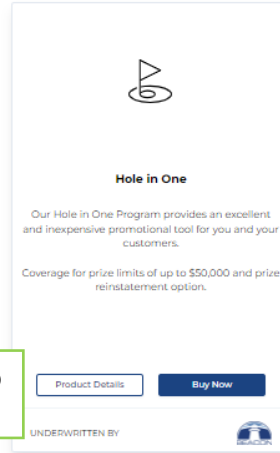
Designed for Cruiser, Touring, Standard, Dual Purpose / Adventure and Sport Bikes.

Annual Physical Damage policy where motorcycles are usually stored for a portion of the year.

NOW INCLUDING:
Inflation Protection
Roadside Assistance

Product Details Buy Now

UNDERWRITTEN BY



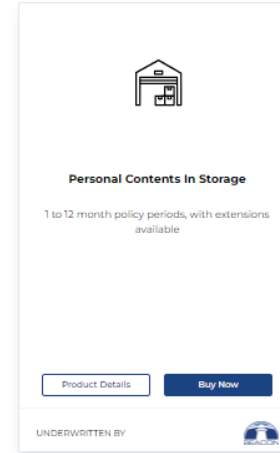
Hole in One

Our Hole in One Program provides an excellent and inexpensive promotional tool for you and your customers.

Coverage for prize limits of up to \$50,000 and prize reinstatement option.

Product Details Buy Now

UNDERWRITTEN BY

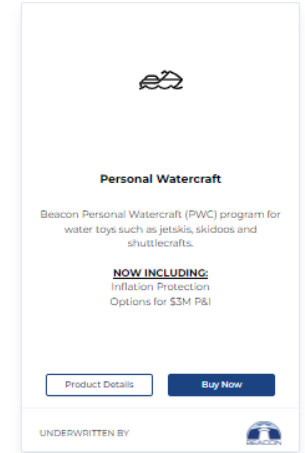


Personal Contents In Storage

1 to 12 month policy periods, with extensions available

Product Details Buy Now

UNDERWRITTEN BY



Personal Watercraft

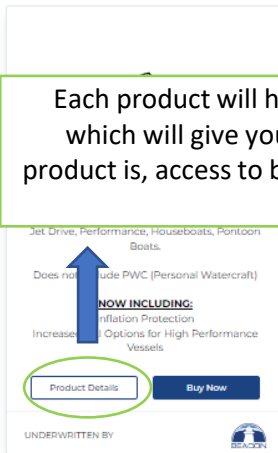
Beacon Personal Watercraft (PWC) program for water toys such as jetskis, skidoos and shuttlecrafts.

NOW INCLUDING:
Inflation Protection
Options for \$3M P&I

Product Details Buy Now

UNDERWRITTEN BY

Each product will have a "Product Details" Button which will give you a snapshot view of what the product is, access to brochures, paper applications and wordings



Pleasurecraft

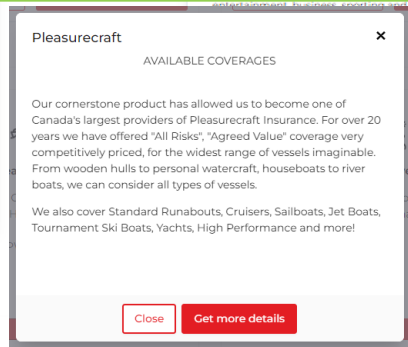
Jet Drive, Performance, Houseboats, Pontoon Boats.

Does not include PWC (Personal Watercraft)

NOW INCLUDING:
Inflation Protection
Options for High Performance Vessels

Product Details Buy Now

UNDERWRITTEN BY



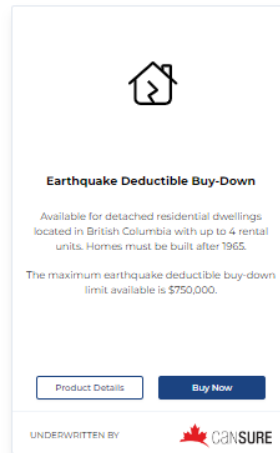
Pleasurecraft

AVAILABLE COVERAGES

Our cornerstone product has allowed us to become one of Canada's largest providers of Pleasurecraft Insurance. For over 20 years we have offered "All Risk", "Agreed Value" coverage very competitively priced, for the widest range of vessels imaginable. From wooden hulls to personal watercraft, houseboats to river boats, we can consider all types of vessels.

We also cover Standard Runabouts, Cruisers, Sailboats, Jet Boats, Tournament Ski Boats, Yachts, High Performance and more!

Close Get more details



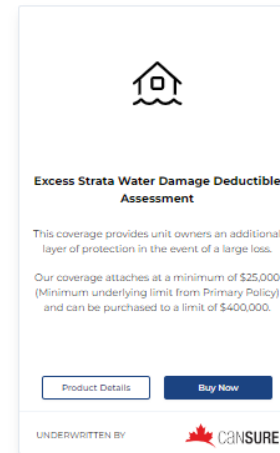
Earthquake Deductible Buy-Down

Available for detached residential dwellings located in British Columbia with up to 4 rental units. Homes must be built after 1965.

The maximum earthquake deductible buy-down limit available is \$750,000.

Product Details Buy Now

UNDERWRITTEN BY



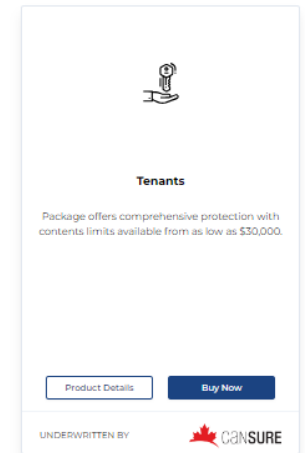
Excess Strata Water Damage Deductible Assessment

This coverage provides unit owners an additional layer of protection in the event of a large loss.

Our coverage attaches at a minimum of \$25,000 (Minimum underlying limit from Primary Policy) and can be purchased to a limit of \$400,000.

Product Details Buy Now

UNDERWRITTEN BY



Tenants

Package offers comprehensive protection with contents limits available from as low as \$30,000.

Product Details Buy Now

UNDERWRITTEN BY

Product Details Snapshot



BEACON RIDESMART (BC MOTORCYCLES)

DESIGNED FOR CRUISER, TOURING, STANDARD,
DUAL PURPOSE / ADVENTURE AND SPORT BIKES

Beacon RideSmart by Cansure is designed for B.C. motorcyclists, offering an annual Physical Damage policy which recognizes that motorcycles are usually stored for a portion of the year. Our 'Agreed Value' policies mean total losses are settled at the limit of insurance, while partial losses are settled at the actual cost of repairs.

Discounts for driver's training courses, experience, recognized club affiliations, and increased deductibles.

[Download brochure](#)





FEATURES OF RIDESMART PROGRAM

- Annual Policy that includes Storage
- "All Risks" Physical Damage policy
- "Agreed Value" based on current market value

POLICY EXTENSIONS INCLUDE

- \$1,000 Trailer Coverage
- \$1,000 Riding Gear Coverage
- \$1,000 Lock Re-Keying (if keys are stolen)
- Emergency Roadside Assistance
- Travel & Touring Protection

[Download the paper application](#)  [Download the wordings](#) 

[Get a Quote](#)

Here you can find the product details in a summary overview.

You can view brochures, download a PDF application, and access wordings (where available) for our products.

Once you are ready, click on the red "Get a Quote" button to be redirected to the application page.

Navigating Your New Dashboard

A snapshot of what is currently on your desk, available right when you sign in. Options to handle work in progress, retrieve policy documents, view upcoming renewals, and more.

The dashboard is titled "Dashboard" and features several key sections:

- Summary Cards:** A row of six cards showing: 11 Products, 402 In Progress Quotes, 26 Referrals, 94 Bound Policies, 0 Renewing Policies, and 3 Reports & Analytics.
- Get Started Section:** A circular area containing a "Get Started" button, a "Select Product" dropdown menu, and a "Start Application" button. A callout explains: "Your office location stats at a glance. Handy information for portal users who manage your office operations."
- Notifications Section:** A table with columns for Date/Time, Subject, Product, and Reference. A callout states: "This Notifications window shows your password change requests and communications related to your quoting activity."
- Product Selection Callout:** A separate callout points to the "Get Started" section, stating: "Know what product you need a quote for? Short on time to browse the marketplace? Click here for a shortcut to the product."

Navigating Your New Dashboard

Click here for a list of all active quotes in your office location.

Actions		
19 Product Details Available products on the portal	235 Apps in Progress Quoted and waiting for final order	1 Action Required Abeyance Needing your attention
115 Bound Policies Searchable by insured, bind date	1 Renewing Policies Within 60 days of expiration	2 All Reports & Analytics Product sales and site activity

Click here to access policies issued by your office location.

Click here to access follow up items, including underwriter notes and referrals.

Click here to run a bordereau style report of your office sales activity.

Click here for active and upcoming renewals, in a listed format to easily access and renew online.

Navigating the Dashboard

Click the "Hamburger menu" to see further navigation items

Notifications

Date/Time	Subject	Product
> 25-Apr-2024 6:22 PM	Password Reset Request	
> 25-Sep-2023 12:53 PM	Password Reset Request	
> 20-Apr-2023 1:00 PM	Password Reset Request	

Navigating the Dashboard

- Products
- In Progress
- Manage
- Reports

In the "In Progress" Tab you will find all ongoing applications/quotes that have **not yet been issued**.

Search any policy by using the "Filters" button and filling out any of the columns listed in the image to the right.

Filters TOTAL: 0

Bind Date

Select start date

Select end date

All Products

All Statuses

Available

All Brokerages

[Clear Filters](#)

Applications

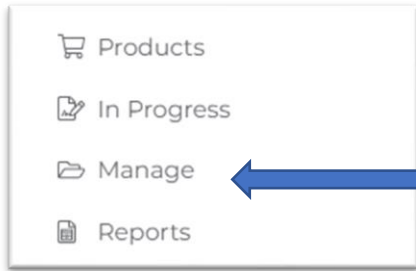
Attention: If Referred and premiums, terms and coverages are displayed, they are not in place until confirmed by Underwriting.

Filters ▼

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Applicant	Product	Reference #	Premium	Status	Renewal Status	Company	Brokerage	Assigned	Started On	Source
	Water Damage Deductible	REFWDD3009362	\$0	Open	Unavailable	Cansure	BrokerLift (Corporate HQ)	Test Cansure Dev Retailer	26-Apr-2024 1:46 PM	Portal
First Last	Water Damage Deductible	REFWDD3009361	\$0	Open	Unavailable	Cansure	BrokerLift (Corporate HQ)	Test Cansure Dev Retailer	26-Apr-2024 1:21 PM	Portal
First Last	Water Damage Deductible	REFWDD3009360	\$0	Open	Unavailable	Cansure	BrokerLift (Corporate HQ)	Test Cansure Dev Retailer	26-Apr-2024 1:18 PM	Portal
	Water Damage Deductible	REFWDD3009357	\$0	Open	Unavailable	Cansure	BrokerLift (Corporate HQ)		26-Apr-2024 1:05 PM	Portal

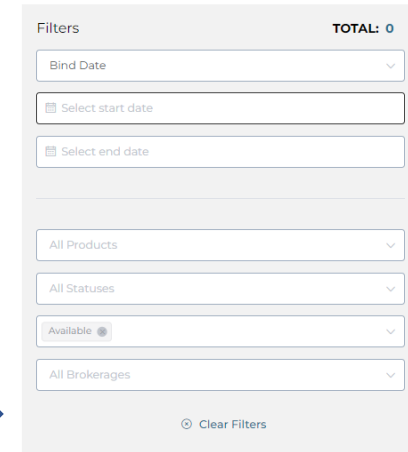
Understanding the Policy Management Feature



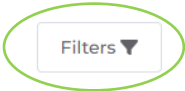
In The **“Manage”** tab you will have access to all **active** bound policies within your access viewpoint.

This tab is essentially your renewal list. If you need to find a policy for renewals, endorsements, or cancellations. This tab will be the place you will need to go to find your policy.

Search any policy by using the **“Filters”** button and filling out any of the columns listed in the image to the right.



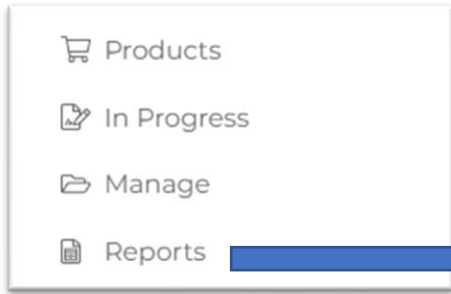
Policies



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Insured	Product	Policy #	Premium...	Status	Renewal Status	Effective Date	Expiry Date	Company	Broker Code	Brokerage	Assigned	Source
Mary Beth, Kenneth Seb	Water Damage Deductible	WDD0000880	\$575	Active	Unavailable	26-Apr-2024	26-Apr-2025	SPGC	TUW_BLHQ	BrokerLift (Corporate HQ)	Test Cansure Dev Retailer	Portal
First Last	Water Damage Deductible	WDD0000879	\$420	Active	Unavailable	26-Apr-2024	26-Apr-2025	SPGC	TUW_BLHQ	BrokerLift (Corporate HQ)	Test Cansure Dev Retailer	Portal
Mary Beth, Kenneth Seb	Water Damage Deductible	WDD0000878	\$575	Active	Unavailable	26-Apr-2024	26-Apr-2025	SPGC	TUW_BLHQ	BrokerLift (Corporate HQ)		Portal
First Last	Water Damage Deductible	WDD0000877	\$420	Active	Unavailable	26-Apr-2024	26-Apr-2025	SPGC	TUW_BLHQ	BrokerLift (Corporate HQ)		Portal

Understanding the Reports Feature



Reporting

Product Reporting



Bordereau

Generate a bordereau sales report of a specific product and date range. Data generated in the report is pre-configured per product.

Generate Report

The **Reporting** feature allows broker to track sales transactions on the portal based on required time frame. This is helpful for anyone in a management or sales reporting function to easily monitor staff sales activity in the portal based on product and date range.

The **Analytics** feature is intended for portal users who have administration access. This allows the user to extract a list of all current users and locations to support staff onboarding / offboarding access as well auditing locations within your brokerage group.

Analytics - Site/User Metrics



All Portal Users

Generate a report of all the portal users in your organization

Generate Report



All Portal Locations

Generate a report of all the locations of the brokerages in your organization.

Generate Report

Overview of Quoting Features

Summary: Overall snapshot of the quote, premium, and client contact details.
Details: Detailed view of the application, showing all questions and answers.
Continue: Placeholder for you unfinished application, click here to go back to the last completed part of your application
Documents: To see any documents generated related to the quote, such as different saved versions of the quote with different coverage options.
Notifications: Any referral or underwriter notifications

Here is the navigational menu, where you can click through each stage of the application.

Save Button is located here, click this button to save your process (auto-save still occurs though!).

Back | Summary | Detail | **Continue** | Documents | Notifications

Application: Water Damage Deductible REFWDD3009361

This policy will be bound as user: **Test Cansure Dev Retailer**

Save



Eligibility

Postal Code: vlvvl

The following requirements must be met in order to proceed:

- Underlying policy limit is for each and every loss and not subject to an aggregated limit.
- The property is a single strata unit and is owner-occupied or rented on either a short-term or long-term basis.
- Underlying policy with a minimum deductible assessment limit of \$50,000 will remain in force for the duration of this coverage.
- There is no other Excess Deductible Assessment coverage in place with Cansure.

Does the applicant agree to the above statements: Yes No

Your active application, is in a questionnaire format, please fill all answers and click Next to navigate to the next page.

Issue Quote | Bind Policy | Send to Underwriter | More Actions

Premium

Broker to colle... ons

Here you can Issue and download a quote, bind and download your active policy, send a referral to an underwriter or assign a quote to another person (Depending on your access level)

How to 'Version' a Quote

To access the versions of the quote, click on 'Documents' when you're in the quote to view a complete list of all versions to access.



Back | Summary Detail **Continue** Documents Notifications

Application: Water Damage Deductible REFWDD3009362

This policy will be bound as user: **Test Cansure Dev Retailer**

Save

Eligibility

Applicant

The Unit

Coverage

Strata

Policy Details

User Agreement

Payment

Eligibility

Postal Code

The following requirements must be met in order to proceed:

- Underlying policy limit is for each and every loss and not subject to an aggregated limit.
- The property is a single strata unit and is owner-occupied or rented on either a short-term or long-term basis.
- Underlying policy with a minimum deductible assessment limit of \$50,000 will remain in force for the duration of this coverage.
- There is no other Excess Deductible Assessment coverage in place with Cansure.

Does the applicant agree to the above statements

Yes

No

Next

Issue Quote

Bind Policy

Send to Underwriter

More Actions

To produce multiple versions of a quote for a client, with different coverage options, click 'Issue Quote' after you have accepted the user agreement. Doing this will generate a new version of the quote and will automatically take you back to the Quote Summary page for your client.

How to 'Version' a Quote

In the Quote Summary view, use the Comments window to make notes for yourself to easily understand what is different in each version.

Date	User	Comment	Actions
12-Jul-2023 4:11 PM	dyeng@spgcanada.ca	Version 2 - 6 months coverage	EDIT DELETE
12-Jul-2023 4:11 PM	dyeng@spgcanada.ca	Version 1 - 3 months coverage	EDIT DELETE

Versions of the quote can be accessed by clicking on Documents when you are in the active client quoting window.

Back | Summary Detail Continue **Documents** Notifications

Documents

Dates	Type	File Name	Description	Ext	Version	Status	Actions
26-Apr-2024	Quote	2024-REFWDD3009361-Quote-V2		pdf	2	Complete	📄
26-Apr-2024	Quote	2024-REFWDD3009361-Quote-V1		pdf	1	Complete	📄

25/page < 1 >

Navigating to Your User Profile Settings

Click on your name here to view your profile settings.

Dashboard

13
Available Products for Quote & Purchase

2448
Applications in Progress (last 60 days)

320
Open Requests for Review

2316
Active Policies

33
Renewing Policies (within 60 days of expiry)

3
Available Reports

Select Product
Start Application

- Dashboard
- Notifications
- Change Password
- My Profile
- Logout

Notifications

Mark All Read

Date/Time	Subject	Product	Reference
> 26-Apr-2024 2:24 PM	Password Reset Request		
> 25-Apr-2024 6:22 PM	Password Reset Request		
> 25-Sep-2023 12:53 PM	Password Reset Request		
> 28-Aug-2023 1:29 PM	Password Reset Request		

My Profile

Profile

User Type	Portal Admin
Full Name	<input type="text" value="Nitasha Ahuja - Broker"/>
Email	<input type="text" value="nahuja@spgcanada.ca"/> Edit ⓘ
Phone number	<input type="text" value="Phone number"/>
Extension	<input type="text" value="Extension"/>

Home Location

Home Location Name	Test Cansure
Address	123 MGA Street
City	Toronto
Province	Ontario
Postal Code	L1H 4W1
Office Phone	(647) 111 1111

Credentials

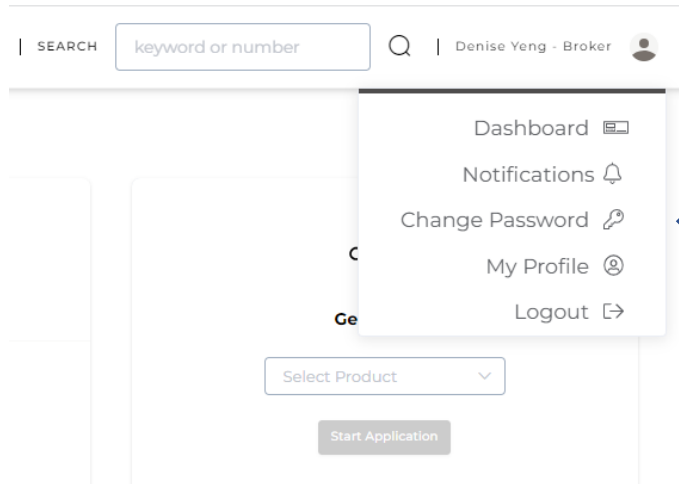
Password	*****	Reset password
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Here you will find your portal credentials, office location information and your access level.

To make any changes to your account, please email your request to portalhelp@spgcanada.ca

[Edit Profile](#) [Save](#)

Resetting your Password



To reset your password, click your name, and on the **“Change Password”** button to be redirected to the password change page.

From here enter your new desired password, click reset and off you go!

Note, password requirements must contain the following:

- One capital letter
- One special character
- One number
- Minimum of 8 characters



Set your Password

Password policy:

- A minimum of 12 characters.
- One uppercase alphabetic character.
- One lowercase alphabetic character.
- One number.
- Spaces are not allowed.

Enter your new password

New Password

Enter your new password again

Password Confirmation

Reset Password

Assigning Policies

Application: Water Damage Deductible REFWDD3009356

Highlights	Applicant	Brokerage	Financial
Product: Excess Strata Water Damage Deductible Assessment	Primary	Location: BrokerLift (Corporate HQ)	
Quote Status: Open	Secondary	Address: 401 University Avenue, 1002	
Application Start Date: 26-Apr-2024	Mailing Address	Brokerage Main Email: test.cansure.owner@brokerlift.com	
Payment Term: Annual	Email (optional)	Brokerage Main Phone: (416) 111 2222	
Binding Status: Pending	Phone (optional)	Created By	
Renewal Status: Unavailable		Assigned To	
		Reassign	

With our new platform, we are introducing a brand new feature that allows users to assign and reassign policies at both the quote or the bound stage of any policy

To access this feature, click onto the policy that you would like to reassign and click the **“Reassign”** button

From here you can find a list of users eligible to reassign the policy you have selected.

Wish to expand this list? Request an access change by emailing portalhelp@spgcanada.ca. Refer to the **“Determining Access levels”** to see the different levels of access that will work for you and your role within your brokerage

Assign Application

Filters

Filters

Search by name



Search By User Type



Search by location



Name	Email	Location	Address	Use	
Adrienne MacLellan (Member Admin)	amaclellan@beacon.insure	Test Beacon (Salmon Arm)	PO Box 370, 290 Alexander St., Salmon Arm, British Columbia, V1E 4N5	Member Admin	Assign
Aiden Ha (Broker)	aiden.ha@hubinternational.com	HUB International Barton Insurance Brokers	45710 Airport Road, Chilliwack, British Columbia, V2P 1A2	Member	Assign
Alan Tam	atam@cansure.com	Cansure Toronto (Test)	2760 - 333 Bay Street, Toronto, Ontario, M5H 2R2	-	Assign

HOT TIP

Use this filter box to manually search the name of the person you wish to assign the policy too

FAQ – What's new?

Quote Versioning

You can now save multiple versions of the same quote for a client, with different coverage options for comparison.

Products

Products are now organized by Personal or Commercial lines.

Policy History

Allows you to track the history of each bound policy all in one place. You can see policy renewal history (where applicable) and change history (coming soon!).

Reports and Analytics

A brand new tool for brokers to track their sales on our platform to help develop strategies for growth.

Personal Watercraft vs Pleasure craft

We have now segmented two classes of our pleasure craft product. PWC will now pertain to water toys such as Jet skis, Skidoos, Shuttlecrafts. Pleasure craft will pertain to Sailboats, Runabouts, Jet Drive, Performance Boats, Houseboats, Pontoon Boats.

Policy Assignment

This allows brokers to assign and reassign policies to other users in their brokerage location. For example, if an employee leaves, brokerages can reassign the bound policy to another employee to manage future renewals.

Multi-Factor Authentication

Added layer of protection to ensure maximum security for all users.

Comments

Brokers can now leave notes for themselves on a quoted or bound policy which will allow them to stay organized and track the sales lifecycle.

Access Levels

We are introducing user administration features for brokerages who have centralized teams managing portal access.

Renewal Lists

Renewal lists are now available on the dashboard for easy access to re-quote and issue. You can view these up to 60 days in advance.

Referrals

Information on referrals will be made more clear, providing the reason for referral in your dashboard without having to go into the policy itself.

Notification Center

Notifications will now be generated with alerts on your dashboard as you conduct business with us. This will allow you to stay on top of any incomplete work.

Change History

You can now change any details on an application after the policy has been bound, that have no immediate effect on the rate initially bound. Automatic generated notifications will be in Change History to keep track of any changes incurred.



Need any additional help? Speak to one of our
representatives by emailing
portalhelp@spgcanada.ca

We hope you enjoy SPGC Portal just as much as we
have creating it for you.

Thank you from the SPGC Team!