

# How to E-Trade in the Durell Portal (Basics)

In the Durell Portal you can e-trade open-market insurance products via the Quote Portal integration.

This guide will explain how to do this in the Admin dashboard.

We strongly **recommend using Chrome** instead of Firefox, Safari or any other browser to use all the features listed below.

## Product Store

Please first review the guide **How to Use the Product Store** and make sure you have setup your Intermediary details – you need to setup this basic information before you can get quotes for any product.

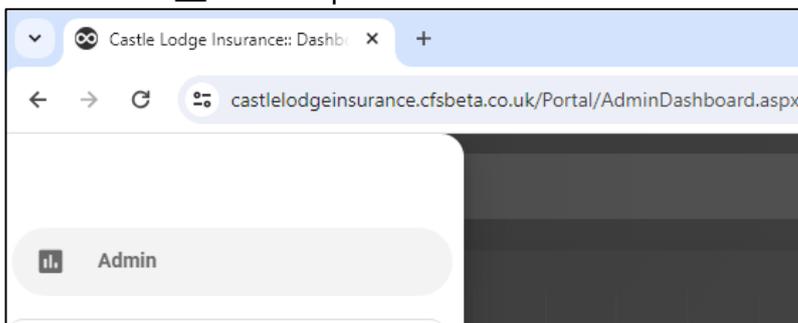
## Where is it located

You can e-trade directly in the **Admin** dashboard of the Durell Portal or through the integration of your Back-Office with the Durell Portal. Below we'll look at trading in the **Admin** dashboard, please see the guide **How to SSO to the Durell Portal** for details on how to use the integration to e-trade from your Back-Office.

- Click on the **≡ Menu** button in the top left.



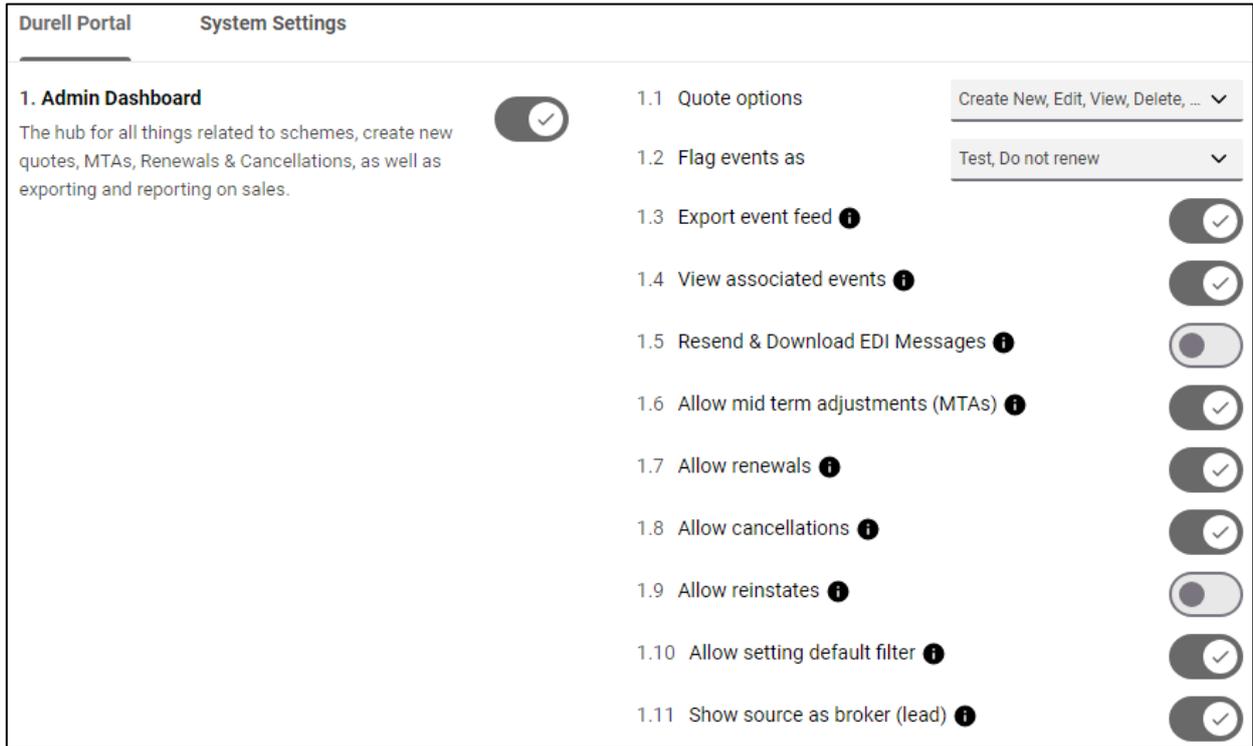
- Click on the **Admin** option in the list.



If you don't see the **Admin** option in the menu then please review guide **How To Use Roles**, toggle on the access right **Admin Dashboard** at the top of of the **Durell Portal** tab of access rights and review the associated settings.

This screenshot shows a typical setup, it has:

- all options selected under **1.1 Quote options**;
- under **1.2 Flag events as** 'Test' and 'Do not renew' are selected;
- all other options selected bar **1.5 Resend & Download EDI Messages** and **1.9 Allow reinstates**.



As mentioned in **How To Use Roles**, if any of the access rights are unclear please try them out with a test custom Role and user. If stuck, please contact our Support team to schedule a call to run through your settings.

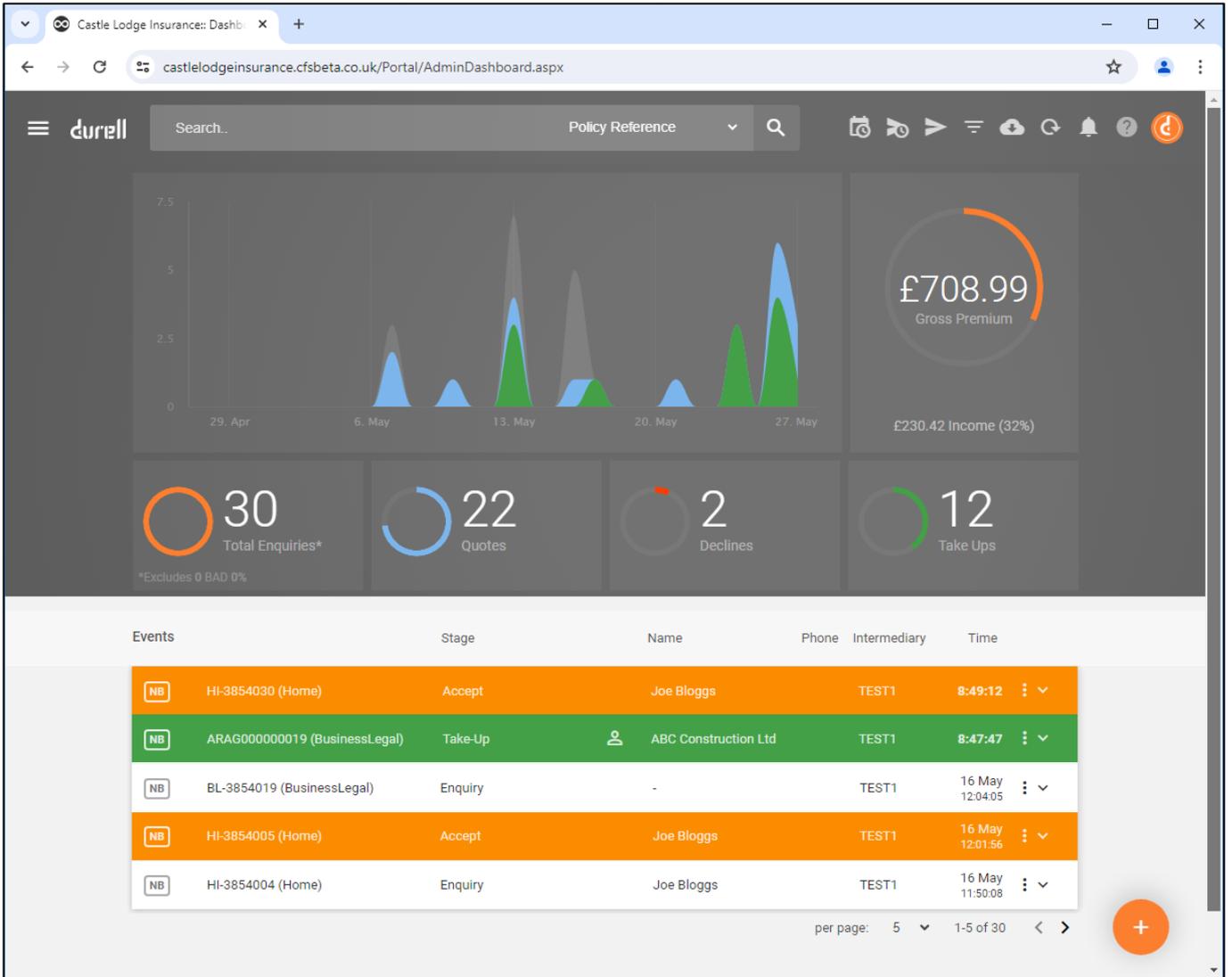
## The Admin Dashboard

This is where you will see all your e-trade activity in the Durell Portal.

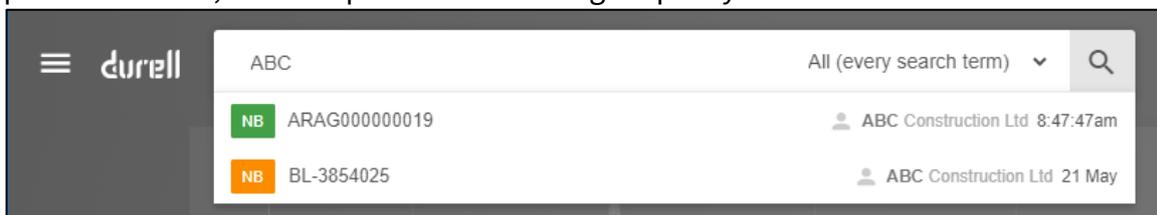
The top half of the screen shows quote conversion MI, and the bottom half shows a quote 'event feed'.

In Quote Portal quotes progress through **Stages**

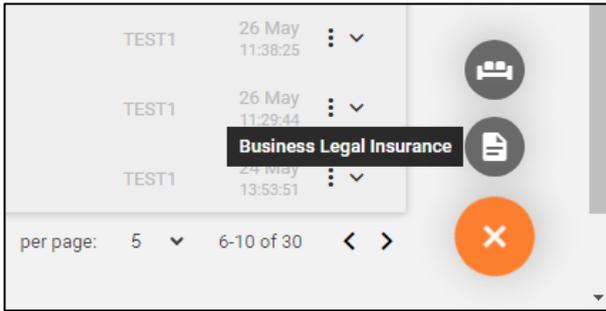
- **Enquiry** – a white Enquiry row is an incomplete quote, no outcome has been generated;
- quoted as **Accept, Refer** or **Decline** – respectively orange, red and grey rows that have generated a quote outcome;
- **Take-Up** – a green Take-Up row is a converted quote.



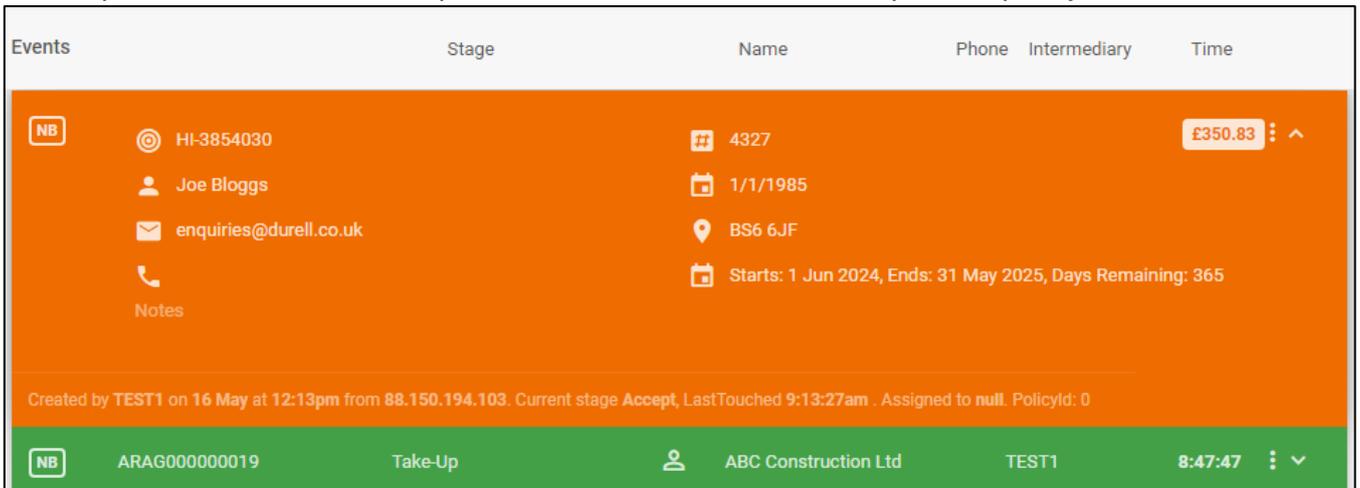
- The **Search** box at the top of the screen has dropdown options that allow you to search for the exact Policy Reference or Quote Reference, or on 'All (every search term)' to search all fields for partial matches, for example when searching for policyholder name.



- Click the **+** button in the bottom right of the screen to start a new quote, you will see the products available as a list of icons.

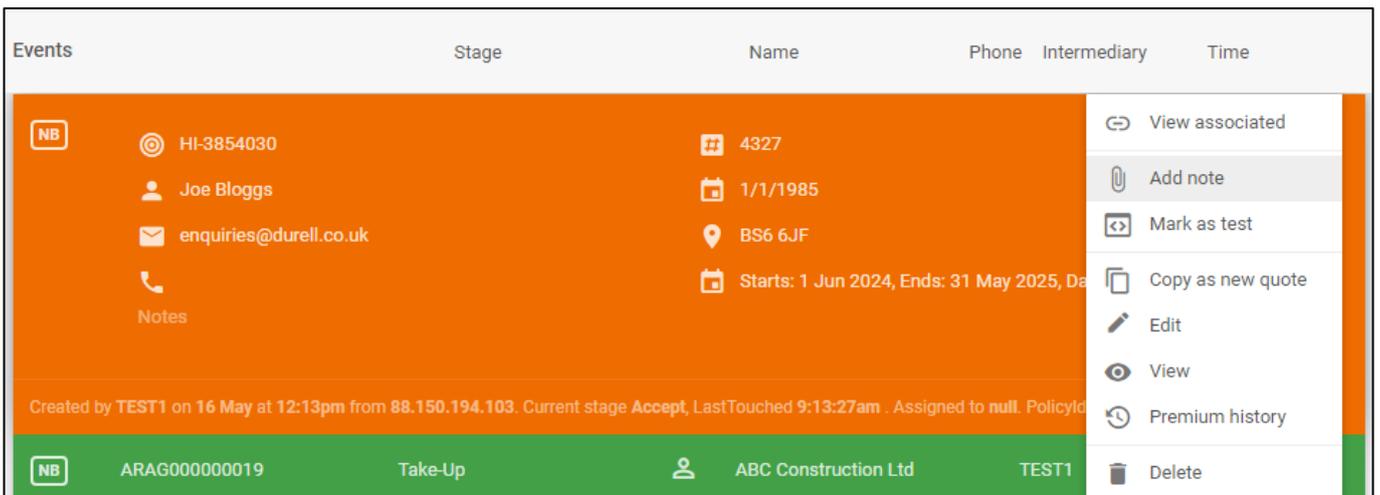


- Clicking the **∨** button on the right-hand-side of a quote event row will expand it to show basic quote information, this expanded view is referred to as the quote or policy ‘card’.



For policies (i.e. Green rows) you will see the insurance documents on the policy card.

- Clicking the **⋮** button on the right-hand-side of a quote row will show a menu of options available for that row.



You will also see options to **✎ Make a change** (i.e. MTA) and **✕ Cancel policy** for policies (i.e. Green rows).

- Clicking the  **Filter** button on the right-hand-side of the toolbar at the top of the screen opens the settings available to filter the events you see in the Admin dashboard.

You can save your settings as a named filter by clicking the  **Save As** button in the top right. The  **Share** button will share your saved filter with other users that have the same Role. The original owner is the only one that can edit a saved filter, other users can click the  **Save As** button and enter a new name to save it as one they can edit.

The  **Set as default** button will make the selected saved filter the default filter in the Admin Dashboard for all users with the same Role.

**Filter** This Month ▾      

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**Date**  
 

**Date type**  
 ▾

**Products**  
 QPBusinessLegal or QPHome. ▾

**Events**  
 NB, MTA, RNW or CANCEL. ▾

**Stages**  
 Enquiry, Accept, Refer, Decline or Take-Up. ▾

**Must have tag(s)**  
 No options selected. ▾

**Must have enrichment(s)**  
 No options selected. ▾

**Must NOT have enrichment(s)**  
 No options selected. ▾

**Export Layout**  
 0 fields defined 

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CANCEL    SAVE & APPLY

Clicking the  edit button next to the **Export Layout** setting opens a report designer that allows you to select from all the data fields to save an export layout with a filter. From the **Admin** dashboard you can then export the event feed with the  **Export Data** button on the right-hand-side of the toolbar at the top of the screen.

We will be publishing a follow-up ‘How to ...’ guide explaining reporting in greater detail.

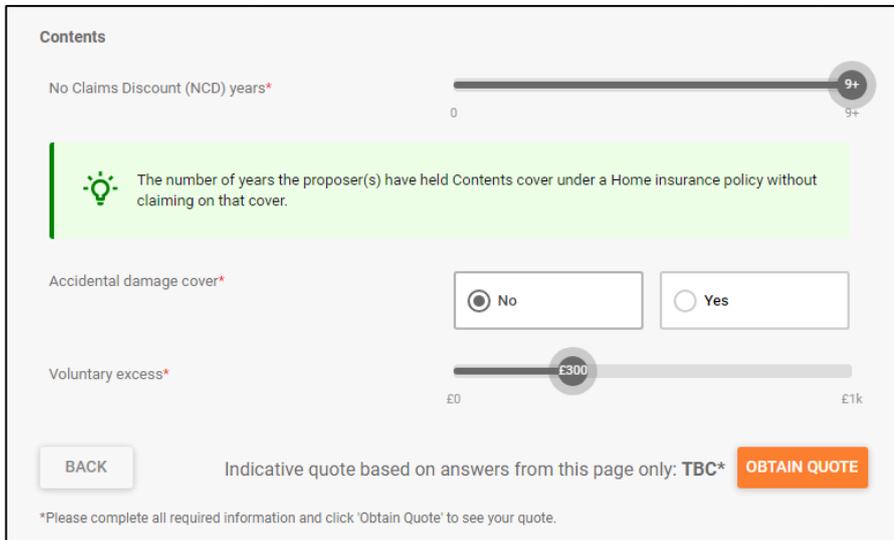
Some points to note regarding the **Date type** setting:

- Filtering by Date = ‘Take-up’ will only show converted events – you won’t see **Enquiry** or quoted **Accept / Refer / Decline** rows.
- Filtering by Date = ‘Insurance Date’ is the same as filtering by ‘Effective’ date but also includes events with ‘Take-up’ date in the period and ‘Effective’ date prior to the period – typically used in insurer bordereau reports.

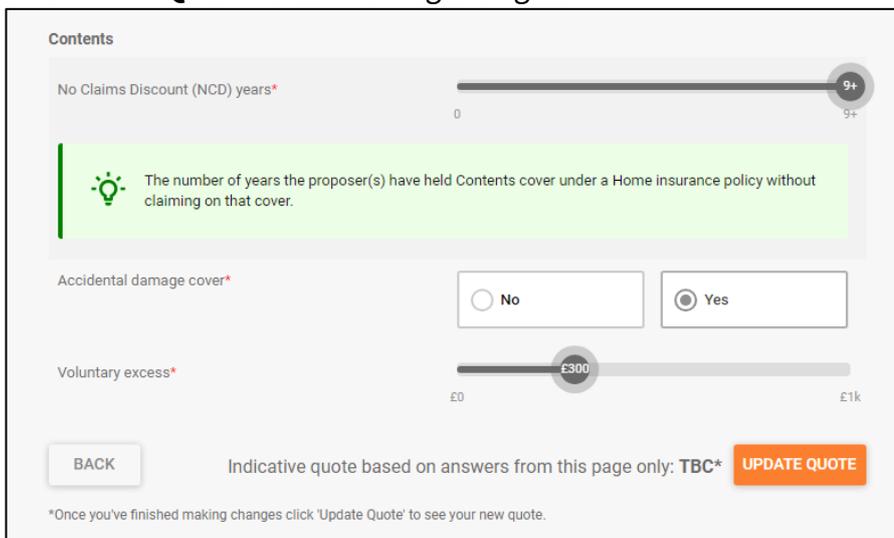
### Quick Quote

Wherever possible products in Quote Portal will have an initial Quick Quote page – this will give you an indicative quote based on the limited information on the Quick Quote page only. It is intended to give you a broad idea of quotability, a firm quote will be given on the final Quote page.

Click the **OBTAIN QUOTE** button at the bottom of the Quick Quote page:



Or **UPDATE QUOTE** after making changes:



To see the indicative quote and click **CONTINUE** to progress through the question set:

### Required Fields

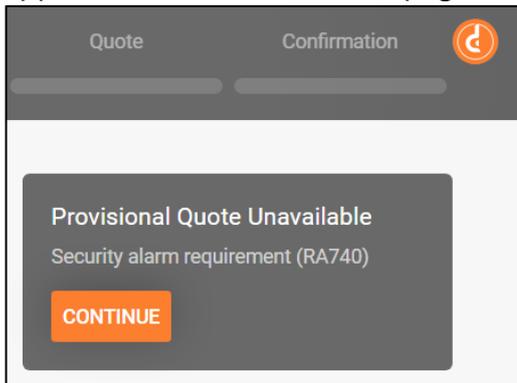
At the end of each section of the question set you click CONTINUE to save your answers to that section and progress to the next section. If a field is required Quote Portal will stop you progressing and highlight the missing field:

## Decline Messages

The refer and decline messages shown in the system come directly from the insurer, hopefully they give a good enough explanation of why a quote isn't accepting but if you're stuck, please email [admin@quoteportal.net](mailto:admin@quoteportal.net) for assistance.

If you see a decline on the Quick Quote page you can still continue through the question set – this can be useful if you think completing the risk may change the quote outcome.

For example an address entered on the Quick Quote page may require additional security to quote; this screenshot shows the decline message “Security alarm requirement (RA740)” - adding an approved alarm on the Home page may change the quote outcome to accept on the Quote page.



### Quick Change (Pre Quote)

Some products in Quote Portal will allow a 'quick change' of options and requote when you reach the Quote page, either just click **CONTINUE** or edit details and click **RECALCULATE** to see your updated quote:

The screenshot shows a web browser window with the URL `castlelodgeinsurance.cfsnetwork.co.uk/App_QuoteModules/QuotePages.aspx?user=castlelodgeinsurance&QuoteType=...`. The page header features the Durell logo and the text "Home Insurance". A progress bar below the header shows the current step as "Quote".

A yellow information box on the left contains the following text:

- Standard Policy Excess £100 (£1000 for Subsidence).
- PLEASE NOTE - The risk is unacceptable if:
  - The buildings of the property to be insured are constructed or roofed in whole or in part with asbestos.
  - If the home is used for business purposes other than clerical.
  - If the expiry date of the previous insurance is greater than 30 days before cover is required.
  - If the property is anything other than a permanent home.
- Automatic Cover - If contents cover is required, £5,000 Business equipment cover is automatically provided (in the home only) for office equipment used for business or professional purposes.
- Automatic Cover - £5,000 cover is provided for tracing and accessing leaks in any one period of insurance.
- Automatic Cover - £1,000 cover is provided for refrigerated and frozen food.

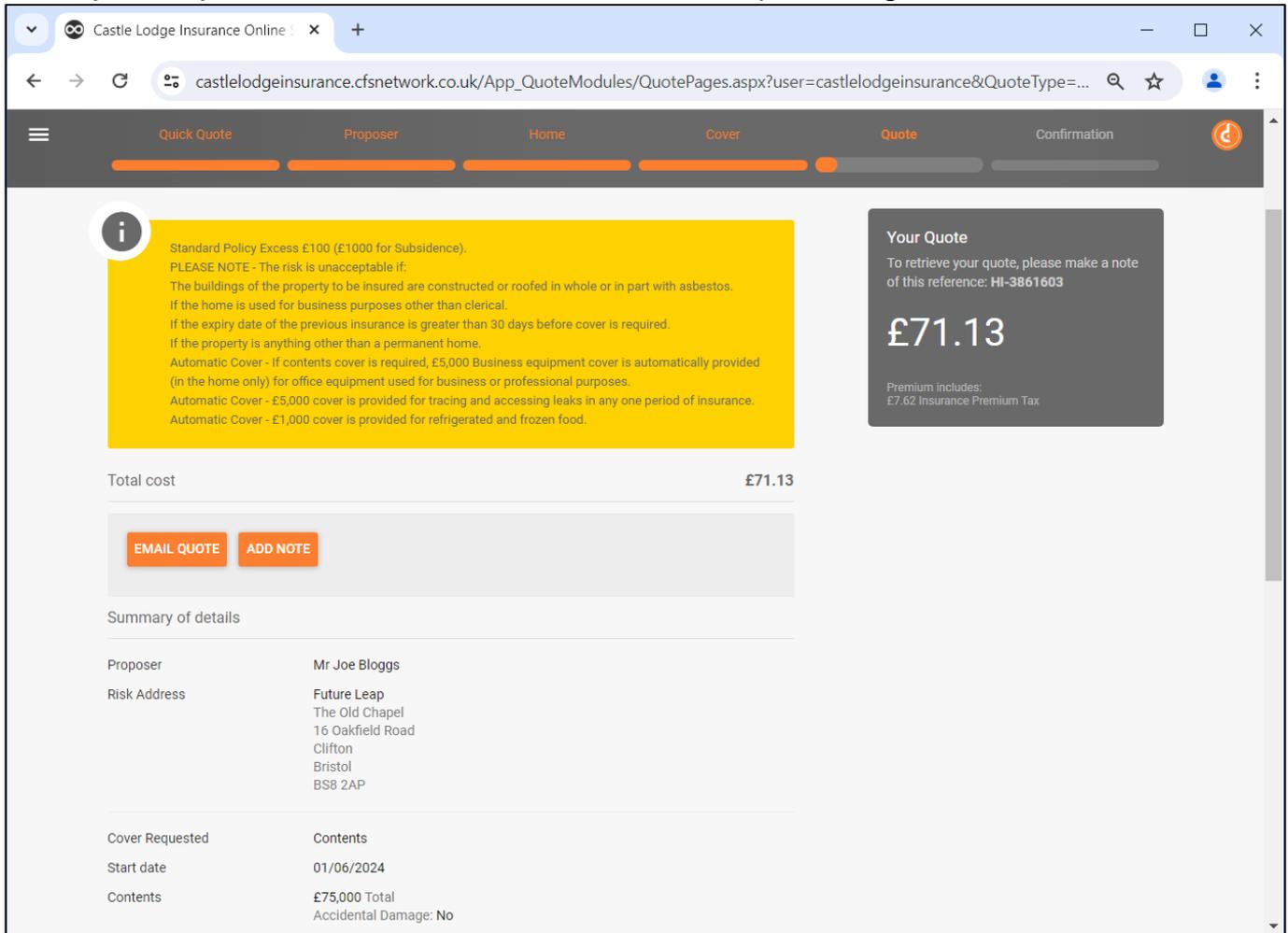
On the right, a grey box titled "Your Quote" displays:

- To retrieve your quote, please make a note of this reference: **HI-3861603**
- £61.60**
- Premium includes: £6.60 Insurance Premium Tax

Below the information box, the "Total cost" is listed as **£61.60**. The "Accidental damage cover" section has a "Contents\*" field with radio buttons for "No" (selected) and "Yes". The "Voluntary excess" section has a "Contents\*" field with a slider set to **£300**, ranging from £0 to £1k. At the bottom, there are "BACK" and "RECALCULATE" buttons.

## Quote

On the Quote page (and Pre Quote) you may see a yellow info box – this is information that the insurer deems you and your client need to be made aware of before purchasing.



Standard Policy Excess: £100 (£1000 for Subsidence).  
 PLEASE NOTE - The risk is unacceptable if:  
 The buildings of the property to be insured are constructed or roofed in whole or in part with asbestos.  
 If the home is used for business purposes other than clerical.  
 If the expiry date of the previous insurance is greater than 30 days before cover is required.  
 If the property is anything other than a permanent home.  
 Automatic Cover - If contents cover is required, £5,000 Business equipment cover is automatically provided (in the home only) for office equipment used for business or professional purposes.  
 Automatic Cover - £5,000 cover is provided for tracing and accessing leaks in any one period of insurance.  
 Automatic Cover - £1,000 cover is provided for refrigerated and frozen food.

**Your Quote**  
 To retrieve your quote, please make a note of this reference: HI-3861603  
**£71.13**  
 Premium includes:  
 £7.62 Insurance Premium Tax

Total cost **£71.13**

**EMAIL QUOTE** **ADD NOTE**

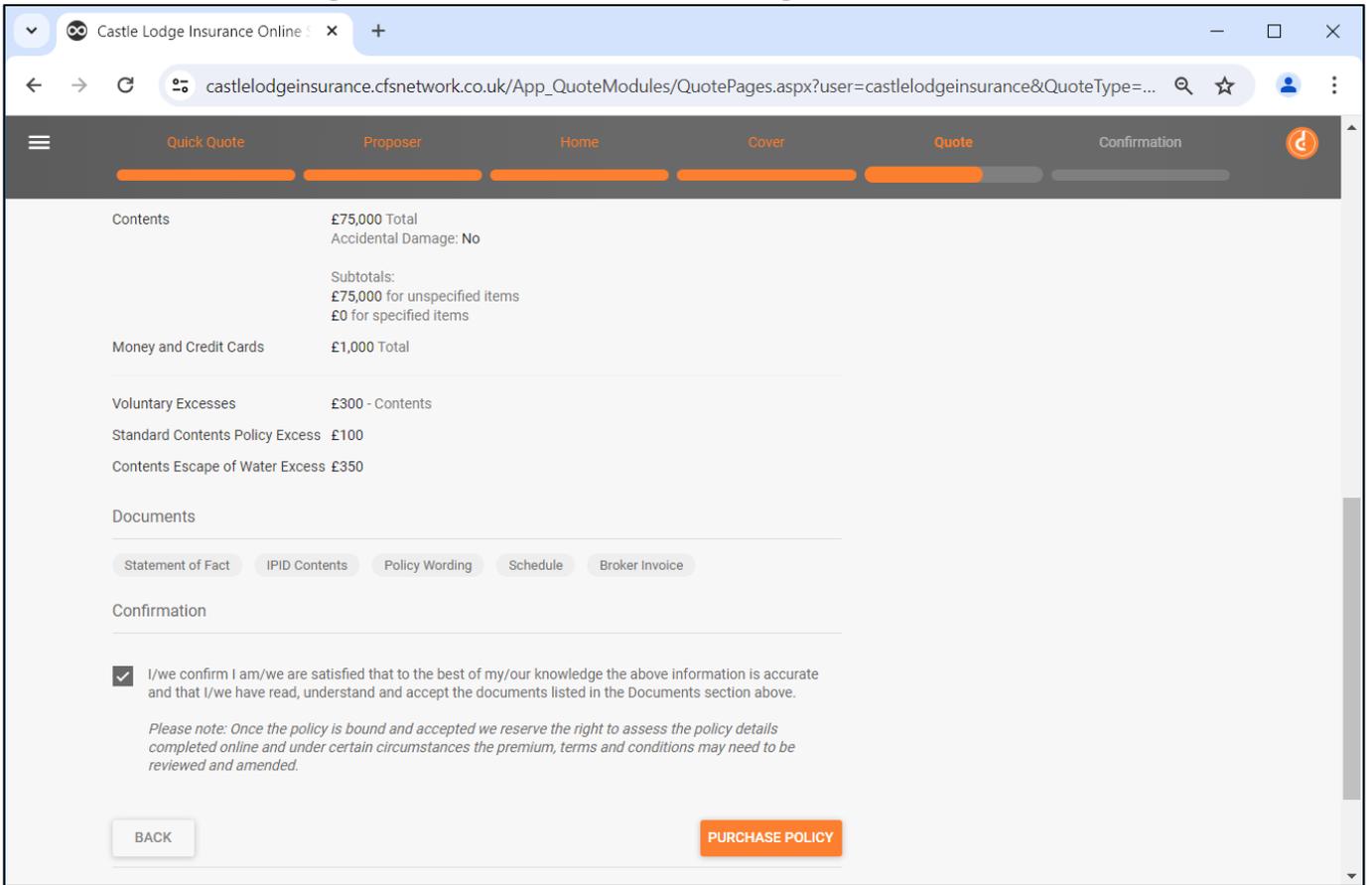
Summary of details

Proposer	Mr Joe Bloggs
Risk Address	Future Leap The Old Chapel 16 Oakfield Road Clifton Bristol BS8 2AP
Cover Requested	Contents
Start date	01/06/2024
Contents	£75,000 Total Accidental Damage: No

The **EMAIL QUOTE** button will send a quote email and document pack to the email address you have setup in Intermediary Management (see guide **How to Use the Product Store**), i.e. it emails you, not your client.

The **ADD NOTE** button will add a note to the quote in Quote Portal, when you purchase any notes will be saved against the policy in your Back-Office.

Scroll down to see the quote documents – these are clickable links so you can open and review the documents before ticking the confirmation box and clicking **PURCHASE POLICY**.



Any purchase in Quote Portal is a 'Purchase on account' – you will receive a monthly statement from Quote Portal with payment details for direct insurer agencies or the premium will be collected by Direct Debit for Durell Wholesale agencies.

### Confirmation

The final screen will show the policy reference and the policy documents – these are also clickable links, but the documents will be emailed to you and saved against the policy (in folder ‘CFS Notifications’) in your Back-Office.

