

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 \equiv **Menu** button in the top left.



• Click on the **LL** 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**;
- o 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.

Durell Portal System Settings			
1. Admin Dashboard	1.1 Quote options	Create New, Edit, View, Delete,	v
The hub for all things related to schemes, create new quotes, MTAs, Renewals & Cancellations, as well as	1.2 Flag events as	Test, Do not renew	~
exporting and reporting on sales.	1.3 Export event feed ()		Ø
	1.4 View associated events 🕦		Ø
	1.5 Resend & Download EDI Me	essages 🕤	
	1.6 Allow mid term adjustments	s (MTAs) 🚯	Ø
	1.7 Allow renewals 🕕		Ø
	1.8 Allow cancellations ()		Ø
	1.9 Allow reinstates (
	1.10 Allow setting default filter	0	Ø
	1.11 Show source as broker (lea	ad) 🔁	Ø

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;
- 🐼 Castle Lodge Insurance:: Dashbo 🗙 + ~ × ← \rightarrow C castlelodgeinsurance.cfsbeta.co.uk/Portal/AdminDashboard.aspx ☆ 1 ÷ Policy Reference Q 9 ≡ durell £708.99 30 2 Events Name Time Stage Phone Intermediary NB 16 May 12:04:05 : ~ NB BL-3854019 (BusinessLegal) Enquiry TEST1 NB 16 May 11:50:08 : ~ NB HI-3854004 (Home) Enquiry Joe Bloggs TEST1 1-5 of 30 < > per page: 5 🗸
- **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 \bigoplus 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 \vee 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'.

Events		Stage		Name	Phone Intern	nediary Time	
NB	⊚ HI-3854030 L Joe Bloggs		⊞ ⊡	4327 1/1/1985 BS6 6.JE		£350.83 : ^	
	Notes			Starts: 1 Jun 2024, Ends	s: 31 May 2025, Da	ys Remaining: 365	
Created by	TEST1 on 16 May at 12:13pm fro	om 88.150.194.103. Current	t stage Accept , Last	Fouched 9:13:27am . Assig			
NB	ARAG000000019	Take-Up	2	ABC Construction Ltd	TEST1	8:47:47 : 🗸 🖌	

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 **Arrow 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 uses can click the **Save As** button and enter a new name to save it as one they can edit.

The 2 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 👻	∎ ∕	8<2
Date		
This month		
Date type		
Last Touched		~
Products		
QPBusinessLegal or QPHome.		~
Events NB, MTA, RNW or CANCEL.		~
Stages Enquiry, Accept, Refer, Decline or Take-Up.		~
Must have taq(s)		
No options selected.		~
Must have enrichment(s) No options selected.		~
Must NOT have enrichment(s) No options selected.		~
Export Layout 0 fields defined		,
(CANCEL	SAVE & APPLY

Clicking the \checkmark 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 **Apprt 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 <u>and</u> '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:

Contents		
No Claims Discount (NCD) years*	0	9+ 9+
-••• The number of years the proposer(s) h claiming on that cover.	ave held Contents cover under a Home insu	arance policy without
Accidental damage cover*	No (Yes
Voluntary excess*	£0	£1k
BACK Indicative quote base	ed on answers from this page only:	TBC* OBTAIN QUOTE
*Please complete all required information and click 'Obtai	n Quote' to see your quote.	

Or **UPDATE QUOTE** after making changes:

Contents		
No Claims Discount (NCD) years*	0	9
-•••- The number of years the propo- claiming on that cover.	oser(s) have held Contents cover under a Home insu	rance policy without
Accidental damage cover*	No No	Yes
Voluntary excess*	£300 £0	£1
BACK Indicative quo	te based on answers from this page only: 1	
*Once you've finished making changes click 'Upd	late Quote' to see your new quote.	



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

~ @	Castle Lodge Insurance Online 🗧 🗙 🕂				_		\times
$\leftarrow \rightarrow$	C castlelodgeinsurance.cfsnetwork	co.uk/QPHome/page1/HI-38610	524#section-Cover		९ ☆		:
≡	Quick Quote Proposer	Home	Cover	Quote Confirmati	on	6	•
	Home		🖋 Review				
	Cover			Your Quote To retrieve your quote, please make of this reference: HI-3861624	a note		l,
	Policy			£61 60			
	Start date*	01/06/2024		£01.00			
	Cover required*			Premium includes: £6.60 Insurance Premium Tax			
		Buildings Contents	Buildings and Contents				
	Contents						
	No Claims Discount (NCD) years*	0	99				
	••••••••••••••••••••••••••••••••••••••	eld Contents cover under a Home insurance	policy without				
	Accidental damage cover*	○ No	s				
	Voluntary excess*	£300	£1k				
	BACK Indicative quote based on	answers from this page only: £61.6	0* CONTINUE				
	*This is intended to give a broad idea of quotability. If you contin final Quote page.	ue, and our panel can provide cover, a firm quot	e will be given on the				-

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:

Proposer	
Title*	Mr 🗸
Forename(s)*	Tom
Surname*	Test
Date of birth*	· · ·
-	
This section still has 1 question remaining.	
	CONTINUE



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 <u>admin@quoteportal.net</u> 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:

Seastle Lodge Insurance Online S × +		-	
↔ ♂ C castlelodgeinsurance.cfsnetw	/ork.co.uk/App_QuoteModules/QuotePages.aspx?user=cas	stlelodgeinsurance&QuoteType= 🍳 🕁	4 :
durell		Home Insurance	^
Quick Quote Proposer	Home Cover	Quote Confirmation	
Standard Policy Excess £100 (£1000 for Su PLEASE NOTE - The risk is unacceptable if: The buildings of the property to be insured - if the home is used for business purposes of if the expiry date of the previous insurance- lif the property is anything other than a perm Automatic Cover - If contents cover is requi (in the home only) for office equipment use Automatic Cover - £5,000 cover is provided Automatic Cover - £1,000 cover is provided	bsidence). are constructed or roofed in whole or in part with asbestos. other than clerical. is greater than 30 days before cover is required. nament home. red, E5,000 Business equipment cover is automatically provided d for business or professional purposes. for tracing and accessing leaks in any one period of insurance. for refrigerated and frozen food.	Your Quote To retrieve your quote, please make a note of this reference: HI-3861603 £61.60 Premium includes: £6.60 Insurance Premium Tax	
Total cost	£61.60		
Accidental damage cover			
Contents*	No Yes		
Voluntary excess			
Contents*	£0 £1k		
BACK	RECALCULATE		



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.

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$\leftarrow \rightarrow$	c .	castlelodgeinsura	nce.cfsnetwork.co.u	uk/App_QuoteModu	lles/QuotePages.a	spx?user=ca	stlelodgeinsurance8	QuoteType= Q	. ☆		:
≡		uick Quote	Proposer	Home	Cover		Quote	Confirmation		6	•
	0	Standard Policy Excess £10 PLEASE NOTE - The risk is u The buildings of the propert if the home is used for busi If the expiry date of the prev if the property is anything o Automatic Cover - If content (in the home only) for office Automatic Cover - £5,000 cr Automatic Cover - £1,000 cr	0 (£1000 for Subsidence) inacceptable if: iy to be insured are constru- ness purposes other than idous insurance is greater i ther than a permanent hor ts cover is required, £5,00 equipment used for busin over is provided for tracing over is provided for refrige	ucted or roofed in whole or clerical. than 30 days before cover i ne. 0 Business equipment cov ess or professional purpos g and accessing leaks in an rated and frozen food.	in part with asbestos. is required. ar is automatically provi ses. ny one period of insuran	ded ce.	Your Quote To retrieve your of this reference £771.1 Premium includes £7.62 Insurance Pr	quote, please make a no 1: HI-3861603 3 emium Tax	ote		
	Total cos	st				£71.13					
	EMAI	L QUOTE ADD NOTE									J
	Summar	y of details									
	Proposer	M	Ir Joe Bloggs								
	Risk Addre	ess Fi Ti C B B B	uture Leap he Old Chapel 6 Oakfield Road lifton ristol S8 2AP								
	Cover Req	juested C	ontents								
	Start date	0	1/06/2024								
	Contents	£	75,000 Total ccidental 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**.

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÷	\rightarrow	C 😅 castlelodgein	surance.cfsnetwork.co.uk/App_QuoteModules/QuotePages.aspx?user=castlelodgeinsurance&QuoteType=	Q	☆	•	:
=		Quick Quote	Proposer Home Cover Quote Confirme	ation		6	•
		Contents Money and Credit Cards Voluntary Excesses Standard Contents Policy Exces Contents Escape of Water Exce	E75,000 Total Accidental Damage: No Subtotals: £75,000 for unspecified items £0 for specified items £1,000 Total £300 - Contents ss £100 ss £350				
		Documents Statement of Fact IPID Col Confirmation IPID Col Image: Confirm Lam/we are and that L/we have read, u Please note: Once the pol completed online and uncreviewed and amended.	Itents Policy Wording Schedule Broker Invoice satisfied that to the best of my/our knowledge the above information is accurate inderstand and accept the documents listed in the Documents section above. Icy is bound and accepted we reserve the right to assess the policy details fer certain circumstances the premium, terms and conditions may need to be				
		BACK	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.

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	Home Insur	ance	6	
Quick Quote	Proposer Home Cover Quote Confirmation			Ľ
Application Comp Your policy application is now comp Policy Number: Policy Holder:	Diete ete MPD0000016 BLOGGS J			
Effective Date:	01/06/2024			
Premium:	£71.13			
Documents:	Statement of Fact IPID Contents Policy Wording Schedule Broker Invoice			