

How to Use the Product Store

Within the Durell Portal you can e-trade open-market insurance products via the Quote Portal integration. The products available can be viewed in the Product Store – this is where you can request agencies and add products to your Admin Dashboard.

This guide will explain the Product Store.

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

Agency Types

Insurers in Quote Portal can make their products available to brokers under a direct agency with that broker, or alternatively under an agency with Durell Wholesale.

Some products will only be accessible through Durell Wholesale – for example where the insurer only wants a single bordereau and statement for all business placed in Quote Portal.

We will endeavor to pre-approve brokers with Durell Wholesale agencies for each new product ahead of its launch. For more details regarding Durell Wholesale please visit <https://durellwholesale.co.uk/>

Product Visibility

Insurers can choose how visible their products are in Quote Portal – e.g. are they only visible to specific brokers, networks or more typically products will be visible to all brokers. Insurers also choose what you can do without an agency:

- see that the product exists in the Product Store;
- view the question set;
- get an indicative quote.

Most typically you will be able to get an indicative quote without an agency.

Where is it located

Once you're logged into the Durell Portal.

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



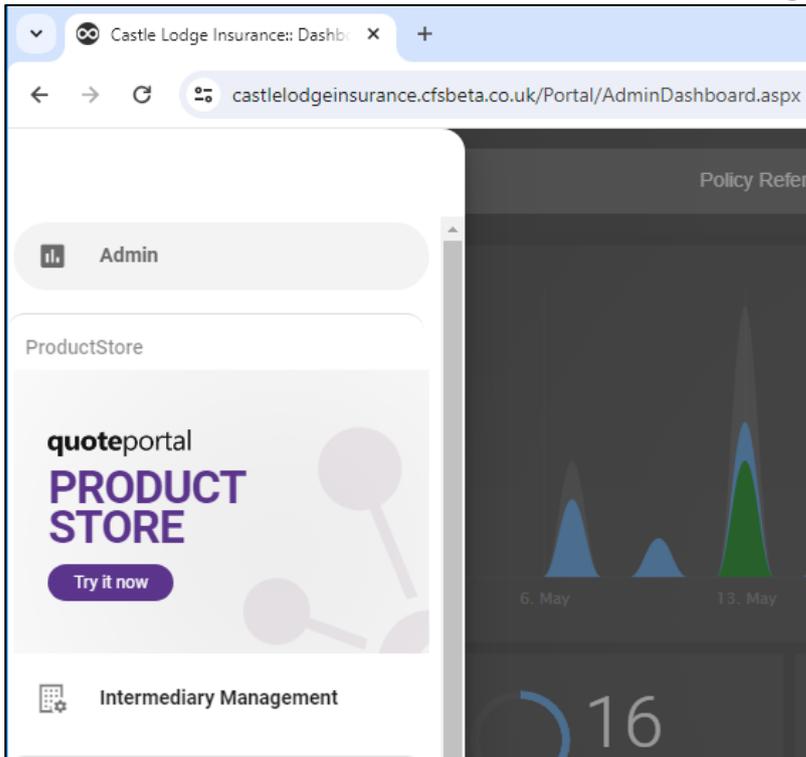
The features explained in this guide are all found in the **ProductStore** section of the menu.

If you don't see the **ProductStore** section in the menu then please review guide **How To Use Roles** and toggle on the access right **QuotePortal ProductStore** in the Administration and Configuration Modules section of the **Durell Portal** tab of access rights.

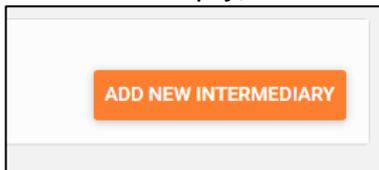
Intermediary Management

This is where you manage details about your business - to identify you to insurers, display in documents, receive email communications from Quote Portal, etc. **You need to setup this basic information before you can get quotes for any product.**

- Under the **ProductStore** section click **Intermediary Management**.



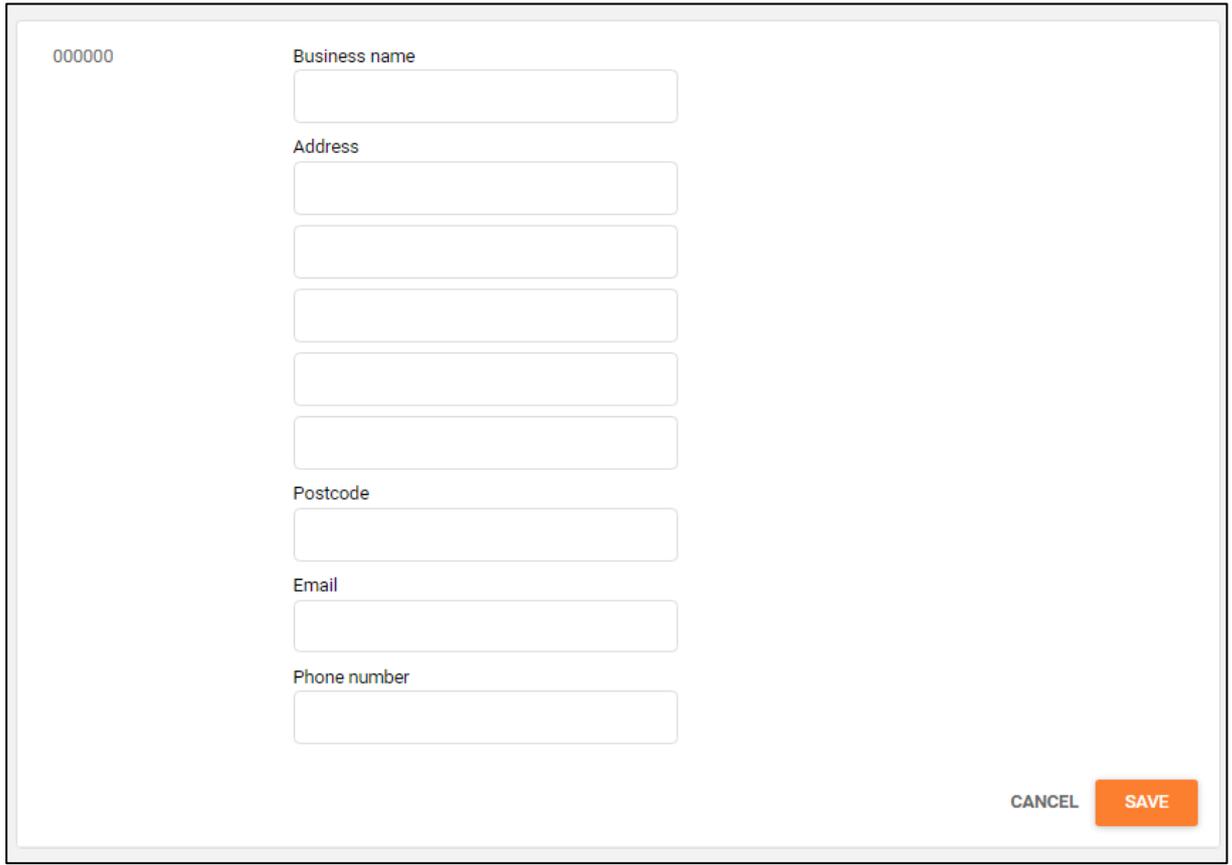
- If the list is empty, click the **ADD NEW INTERMEDIARY** button.



- Or if there are already Intermediary details in the list, click the **> More** icon on the right to check or update those details.



- Make sure to complete at least the Business name, Address and Email and then click **SAVE**.



The screenshot shows a form with the following fields:

- 000000
- Business name
- Address (multiple lines)
- Postcode
- Email
- Phone number

Buttons: CANCEL, SAVE

The Business name, Address and phone number will pull through to quote and policy documents. You should enter the contact details you want your clients to see in any documentation issued.

The email address is crucial! This is the address that will receive quote and confirmation emails from Quote Portal.

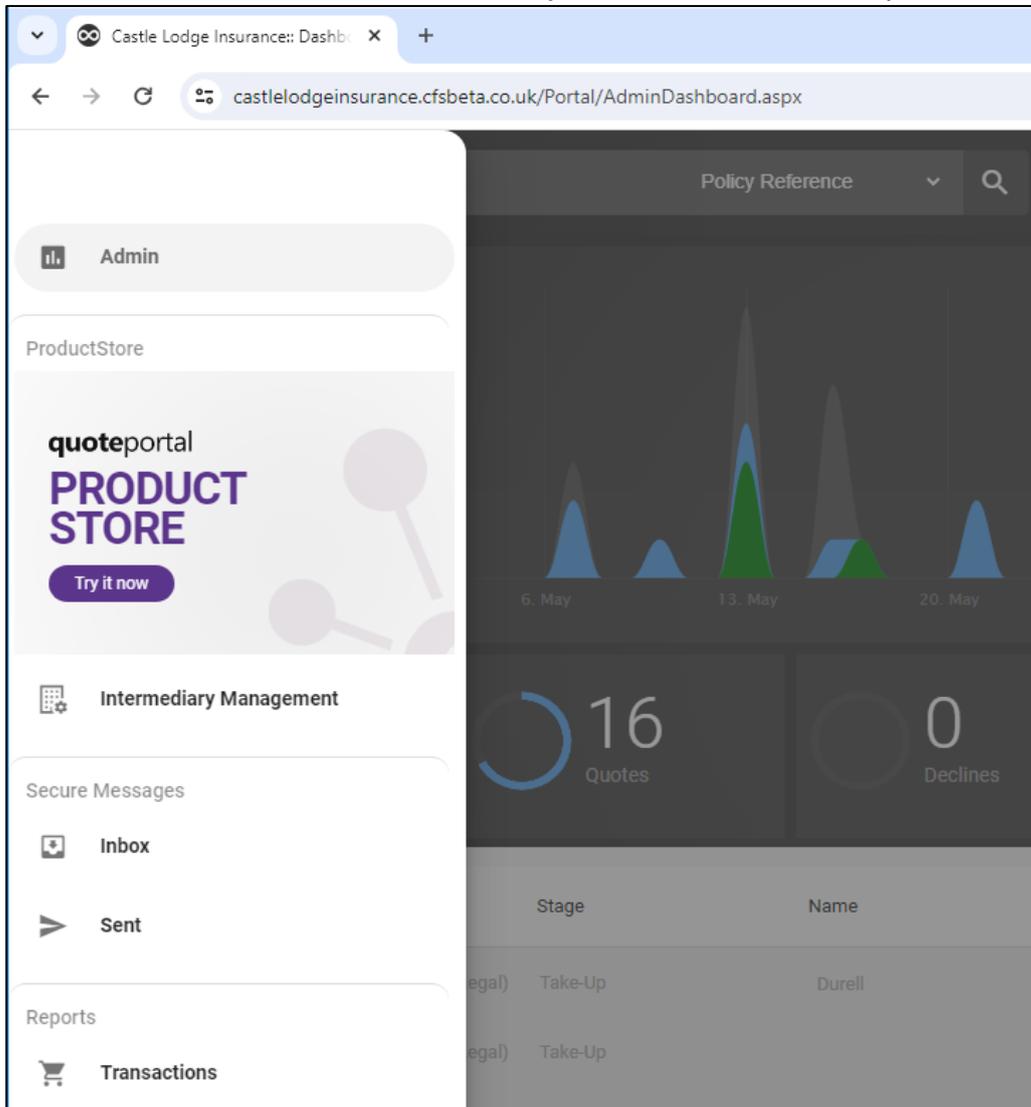
If you don't already have one, we suggest you setup a shared inbox to receive these emails. This means all members of your team will be able to pick-up quote and confirmation emails rather than those emails being delivered to a single user's inbox.

You can setup as many sets of Intermediary details as you want, for example for your different trading locations or teams. Users can then select from that list when they quote.

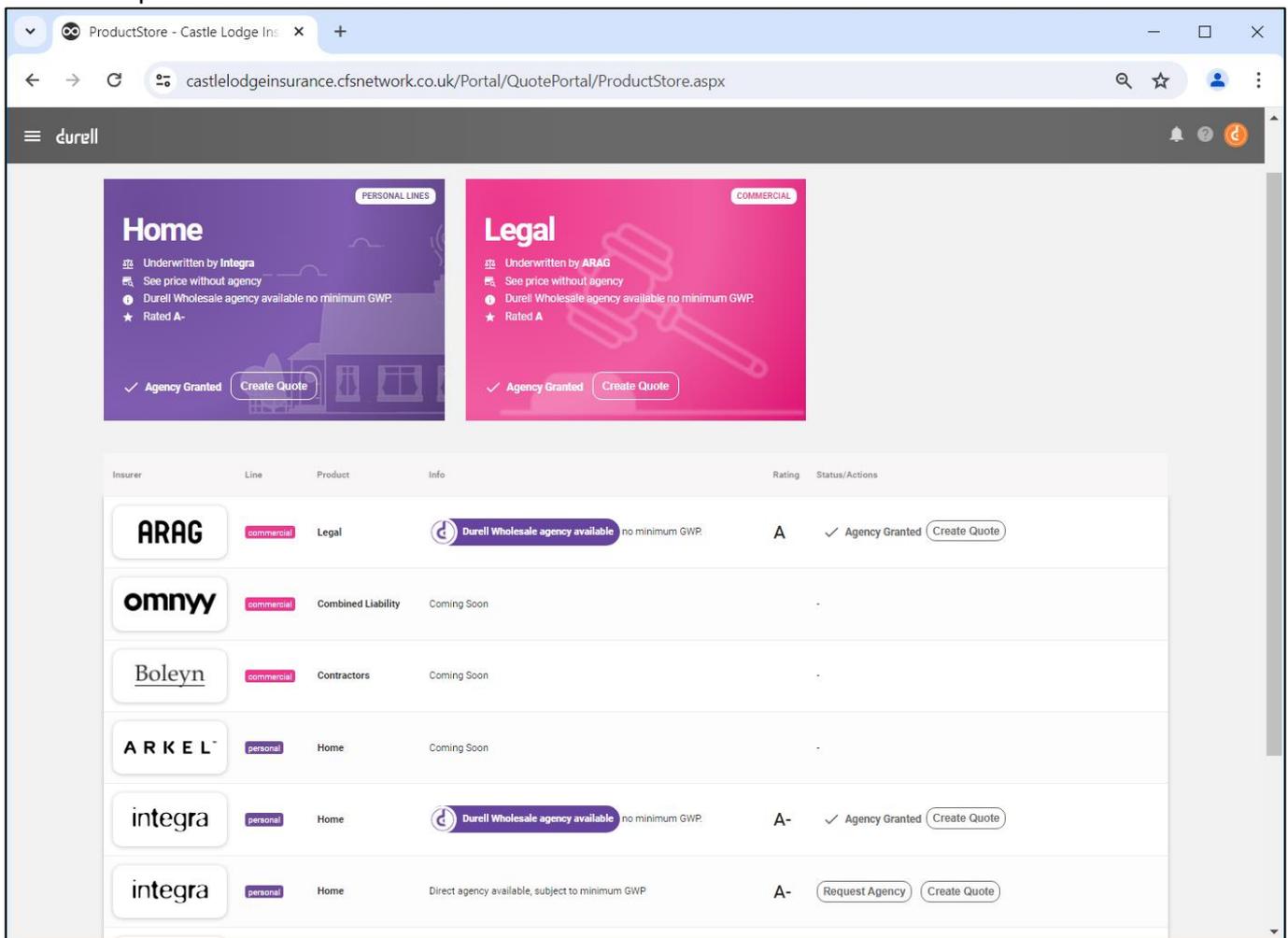
Product Store

This is where you manage the products you can e-trade in the Durell Portal.

- Under the **ProductStore** section click anywhere in the **Try it now** panel.



- We will be developing this page further but fundamentally this is where you see which products are available.



For example in this screenshot you see that:

- ARAG’s Business Legal product is available under a Durell Wholesale agency only;
- Integra’s Home product is available either under a Durell Wholesale agency or an agency directly with Integra.

The AM Best rating of the capacity is shown in the Rating column.

Creating a Quote

Clicking any of the ‘Create Quote’ buttons in the Product Store will start a new quote for that product. Whether you see a quote on the final Quote page will depend on whether or not you have an agency. If you don’t have any agency then what you see depends on what the insurer allows you to see without an agency, as described in the **Product Visibility** section above.

Requesting an Agency

Clicking any of the **Request Agency** buttons in the Product Store will request an agency for that product.

| Insurer | Line | Product | Info | Rating | Status/Actions |
|---------|----------|---------|---|--------|---|
| integra | personal | Home |  Durell Wholesale agency available no minimum GWP. | A- | <button>Request Agency</button> <button>Create Quote</button> |
| integra | personal | Home | Direct agency available, subject to minimum GWP | A- | <button>Request Agency</button> <button>Create Quote</button> |

This sends a notification to the team at Durell to process the request; if you don't get a response within 2 working days or you need a response more quickly please email admin@quoteportal.net.

In a coming release clicking this button will raise the request directly with the insurer to action themselves.

When the request has been processed you will see ✓ **Agency Granted** next to the product and be able to e-trade it in the portal (see guide **How to E-Trade in the Durell Portal (Basics)**).