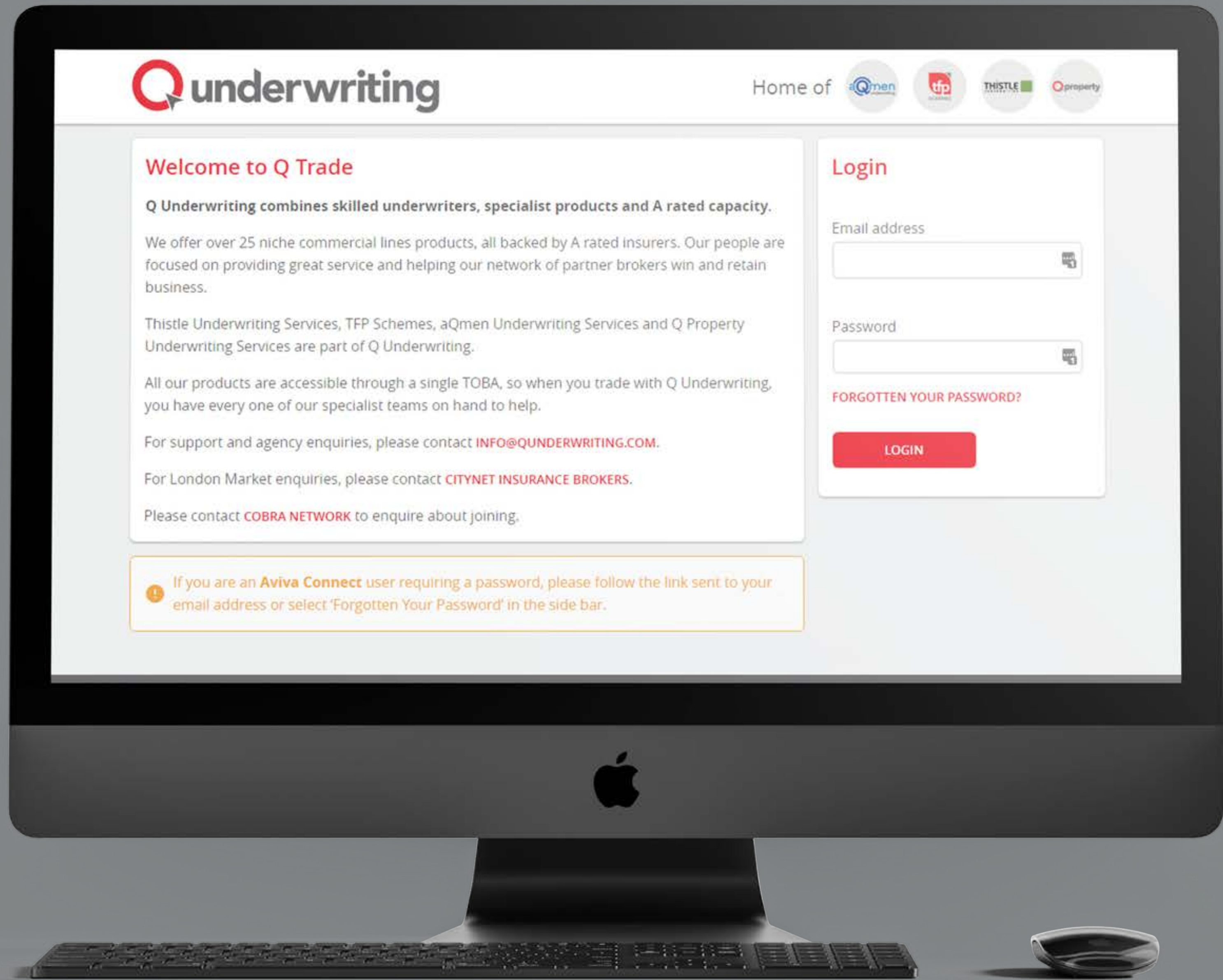
underwriting

Qtrade
User Guide

September 2020

Contents


underwriting
Home of
Welcome to Q Trade
Q Underwriting combines skilled underwriters, specialist products and A rated capacity.
We offer over 25 niche commercial lines products, all backed by A rated insurers. Our people are focused on providing great service and helping our network of partner brokers win and retain business.
Thistle Underwriting Services, TFP Schemes, aQmen Underwriting Services and Q Property Underwriting Services are part of Q Underwriting.
All our products are accessible through a single TOBA, so when you trade with Q Underwriting, you have every one of our specialist teams on hand to help.
For support and agency enquiries, please contact INFO@QUNDERWRITING.COM.
For London Market enquiries, please contact CITYNET INSURANCE BROKERS.
Please contact COBRA NETWORK to enquire about joining.
If you are an Aviva Connect user requiring a password, please follow the link sent to your email address or select 'Forgotten Your Password' in the side bar.
Login
Email address
Password
FORGOTTEN YOUR PASSWORD?
LOGIN

Introduction

Qtrade is the new broker portal from Q Underwriting. Powered by Acturis, Qtrade will bring together all of Q's specialist commercial insurance products onto one platform, making trading across Q easier than ever before.

The portal has been designed to be broker-centric and intuitive. This guide will explain the basics as well as some FAQs and error-handling. Should you have any queries, you can always speak to your usual underwriting contact or email **Qtrade@Qunderwriting.com.**

Qtrade will supersede This Way for Thistle Underwriting brokers and Solo for TFP Schemes brokers.

Accounts

New Accounts

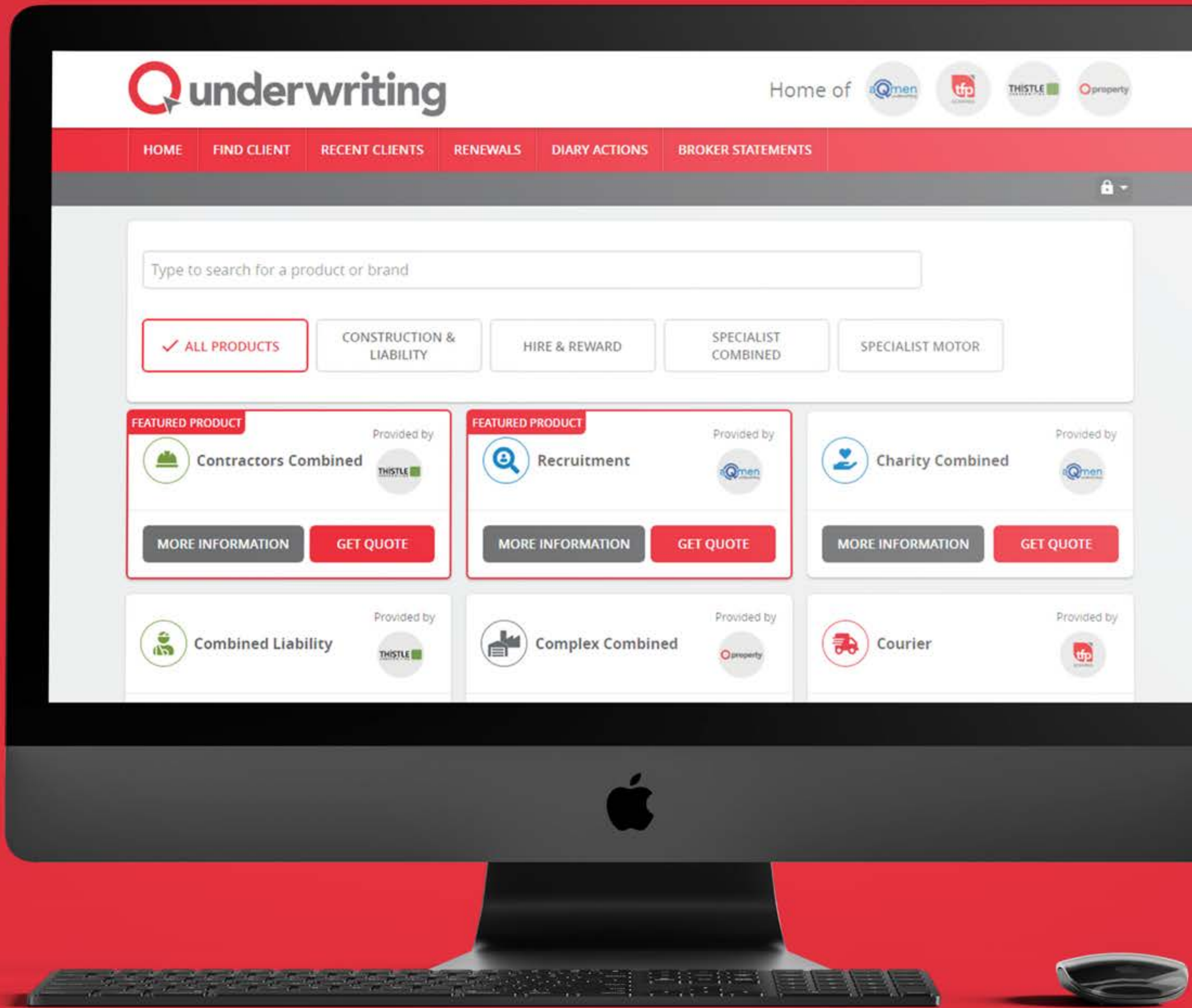
1. Click the ‘take me to my account’ link in the Qtrade Invitation Email
2. Confirm your email address
3. Click the ‘complete registration’ link in the Qtrade Registration Email
4. Confirm your business postcode (e.g. your office postcode)
5. Set your password, confirm it and **log in**

Reset Password

1. Click the ‘forgotten your password?’ link on the login page
2. Enter your email address and click ‘Next’
3. Click the ‘reset’ password’ link in the Qtrade Account Recovery Email – please note, this link is valid for 30 minutes only
4. Confirm your business postcode (e.g. your office postcode)
5. Set your password, confirm it and **log in**

Screen 1

Home & Product Selection Page



Home & Product Selection Page

The Qtrade home page displays many of Q Underwriting's specialist commercial products.

You can search for a product by keyword, category or by searching for the brand which underwrites it within Q Underwriting. You can also filter the products by categories, by clicking the boxes under the search bar.

You can find out more information about a product by choosing the more information button, which will open a 'pop-up' with a brief introduction to the product and a limited list of features and benefits. For more information, click 'find out more' to be taken to the product page on our website.

Basic Navigation

New Clients

New clients can be added at the point of requesting a new quote.

Existing Clients

Existing clients can be found from the 'find client' menu link.

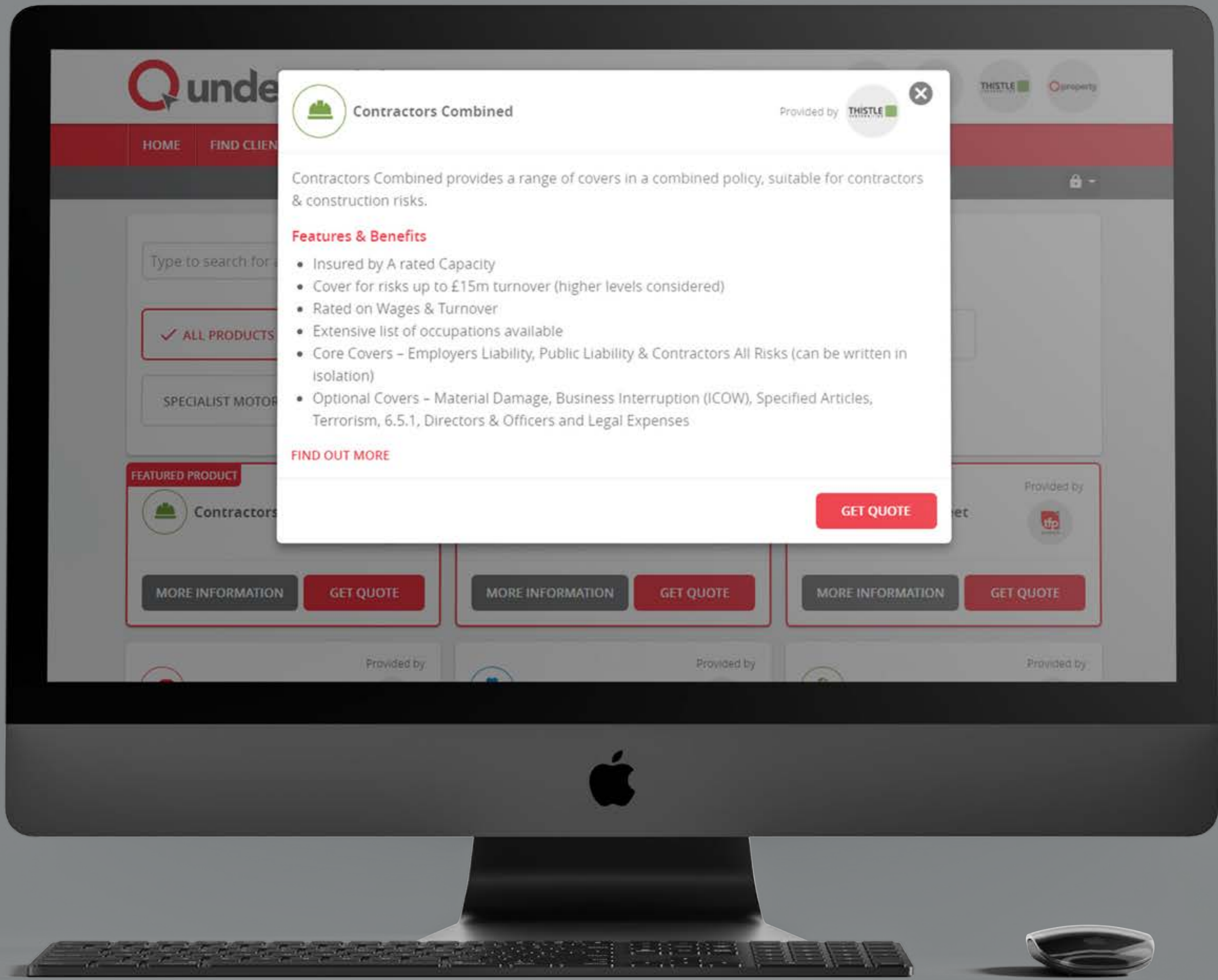
Existing clients can be amended by locating them and choosing Edit Details on their profile.

The 'recent clients' menu link will display the client profiles you have recently accessed.

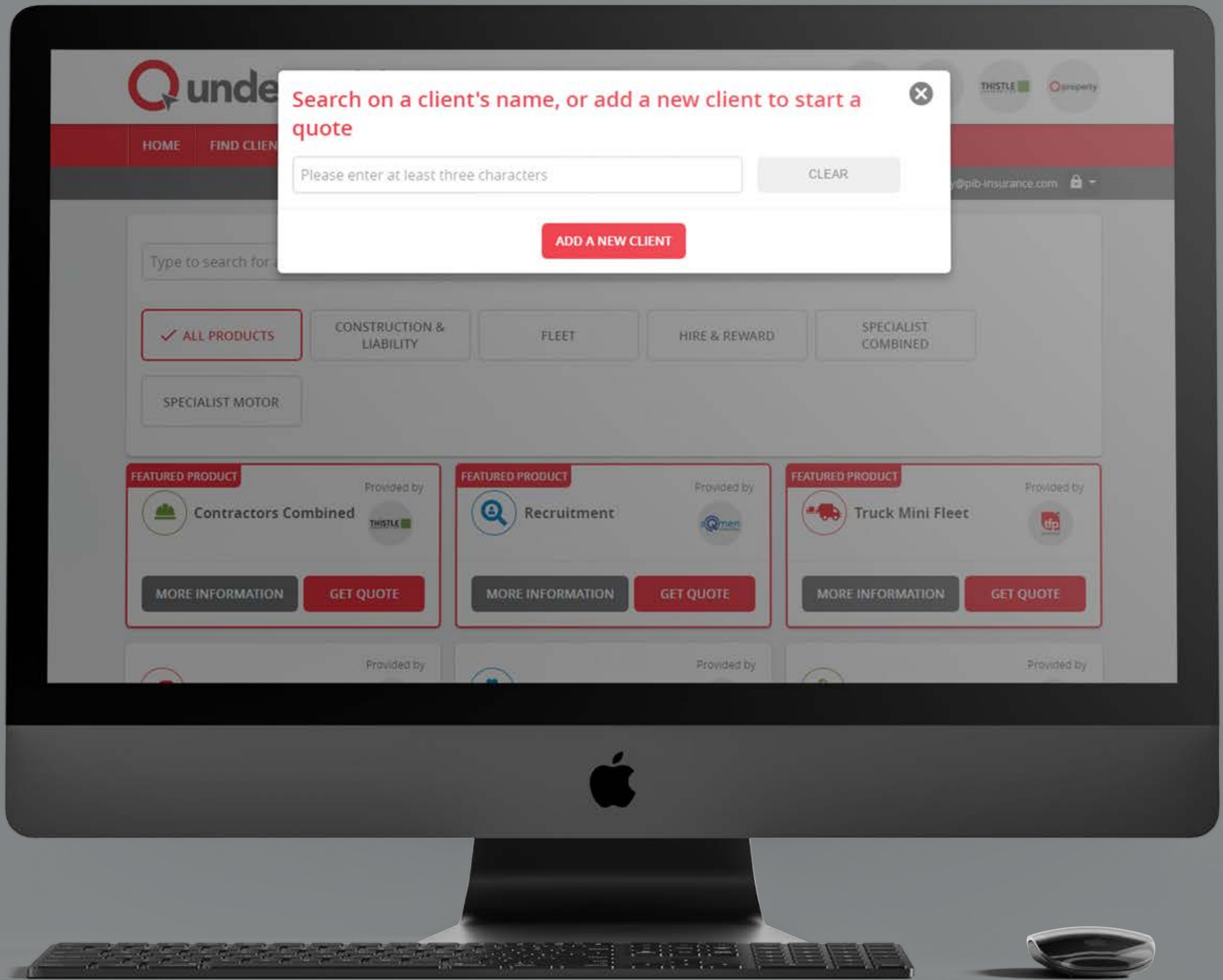
Getting in touch

Whenever you access policy information, the handy sidebar will populate with the contact details of the office which is handling your quotation. Feel free to contact them for support or speak to your usual underwriting contact.

Screen 2 New Quotes



Screen 3 New Quotes



New Quotes

Screen 2
You can get a quote by clicking the 'get quote' button on the product tile or on the more information pop-up.

Screen 3
If the product is Qtrade enabled, you will be directed to find a client or add a new client.

If the product is not Qtrade enabled, you will be directed to a manual submission form on our website **Qunderwriting.com**; here you can submit the risk manually and we will be in touch for any further information we require.

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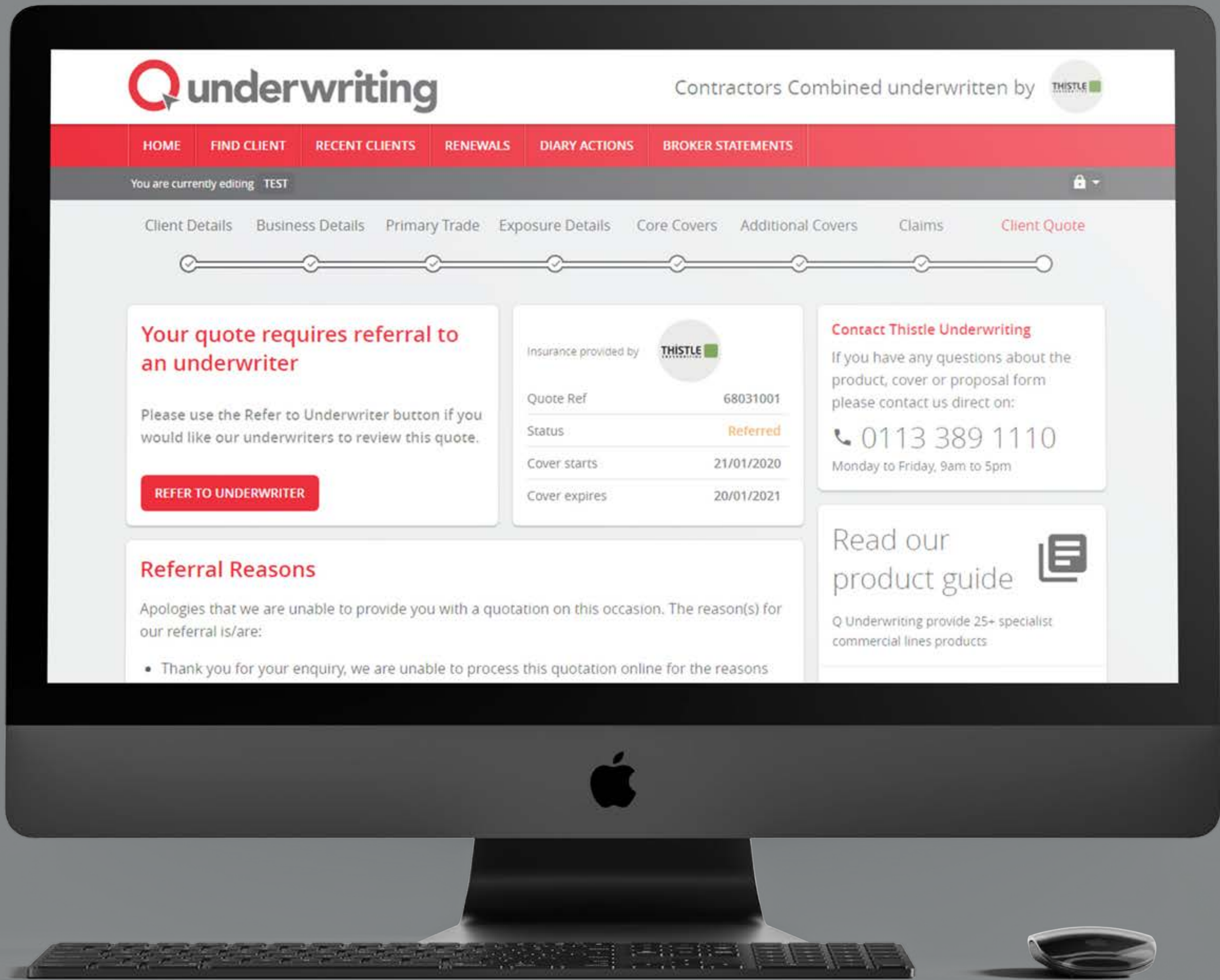
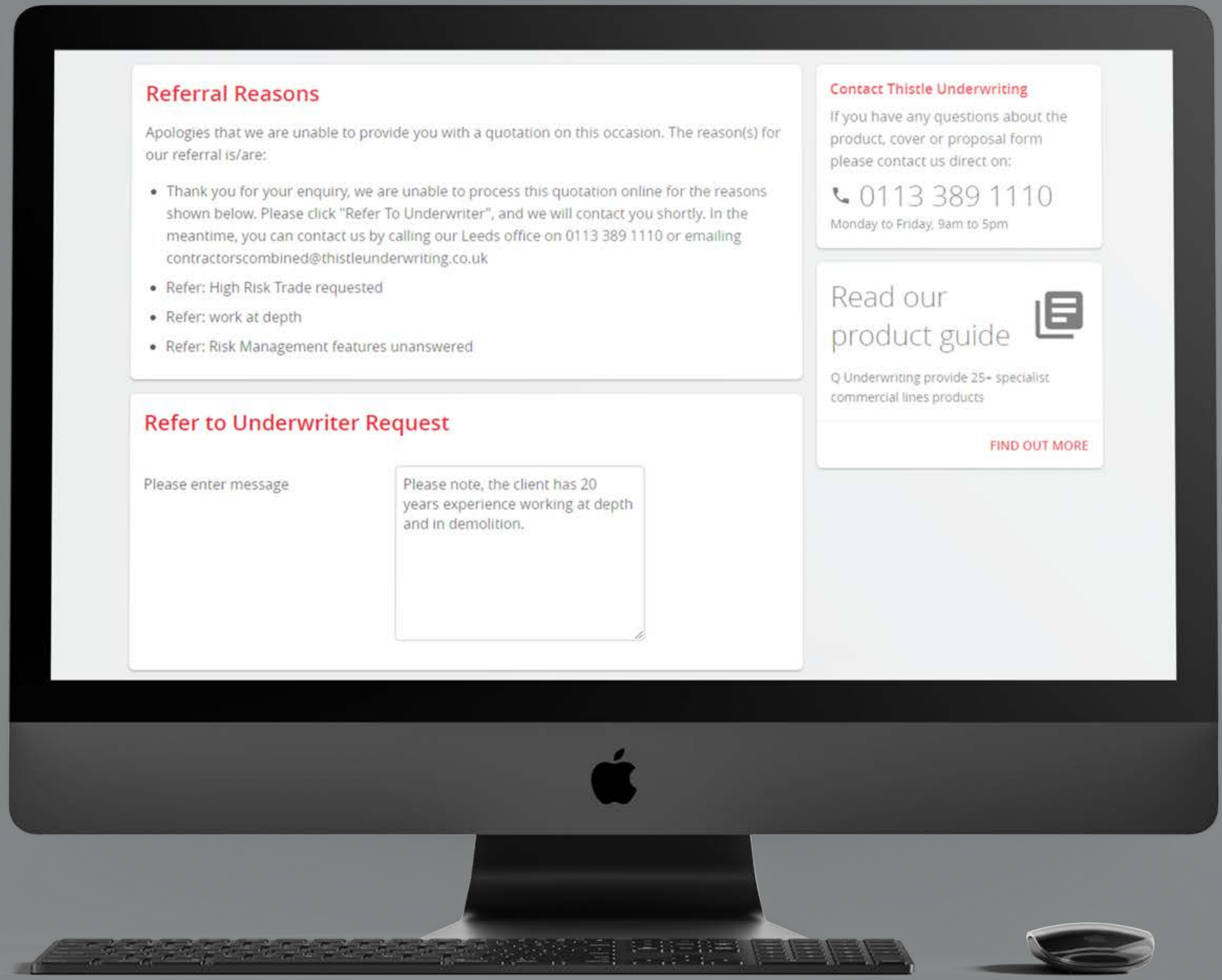
Screen 4 Referrals



Q underwriting

Screen 5 Referrals



Referrals

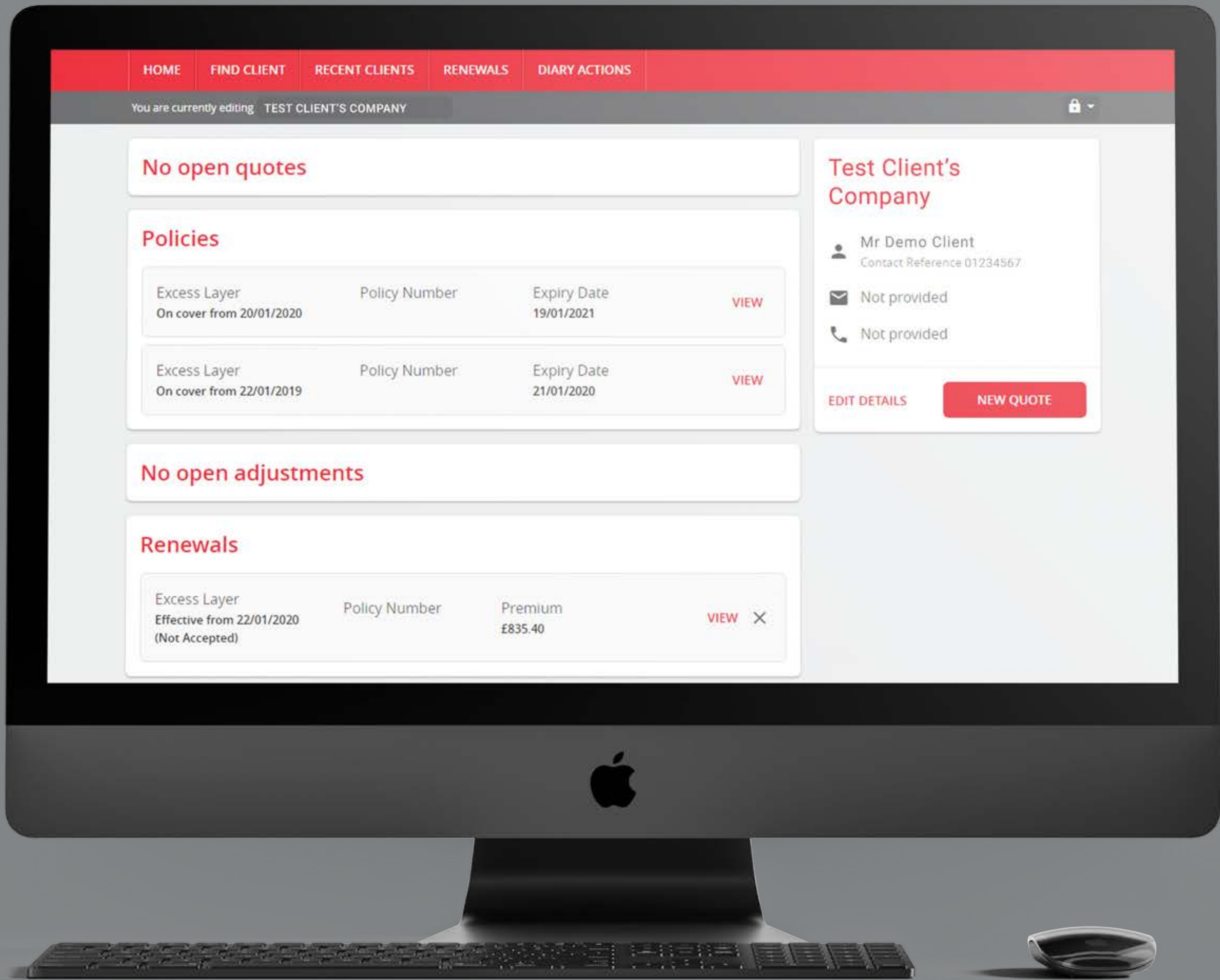
Screen 4

Some quotes cannot be provided online and will require referral to an underwriter. In this situation, please click 'refer to underwriter' to send the quote in for referral.

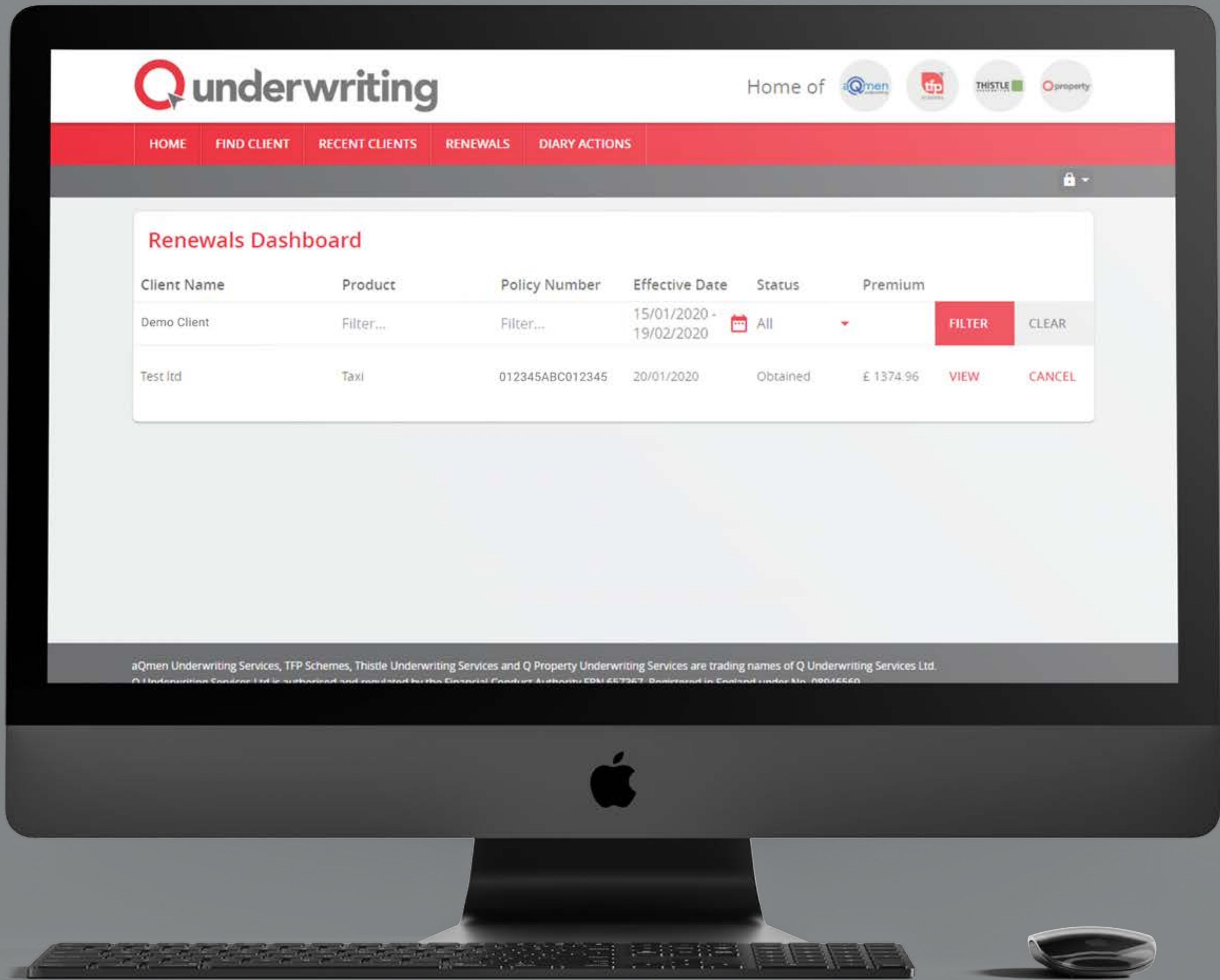
Screen 5

Enter any notes, comments or additional information and your contact details in order to submit the referral.

Screen 6 Renewals



Screen 7 Renewals



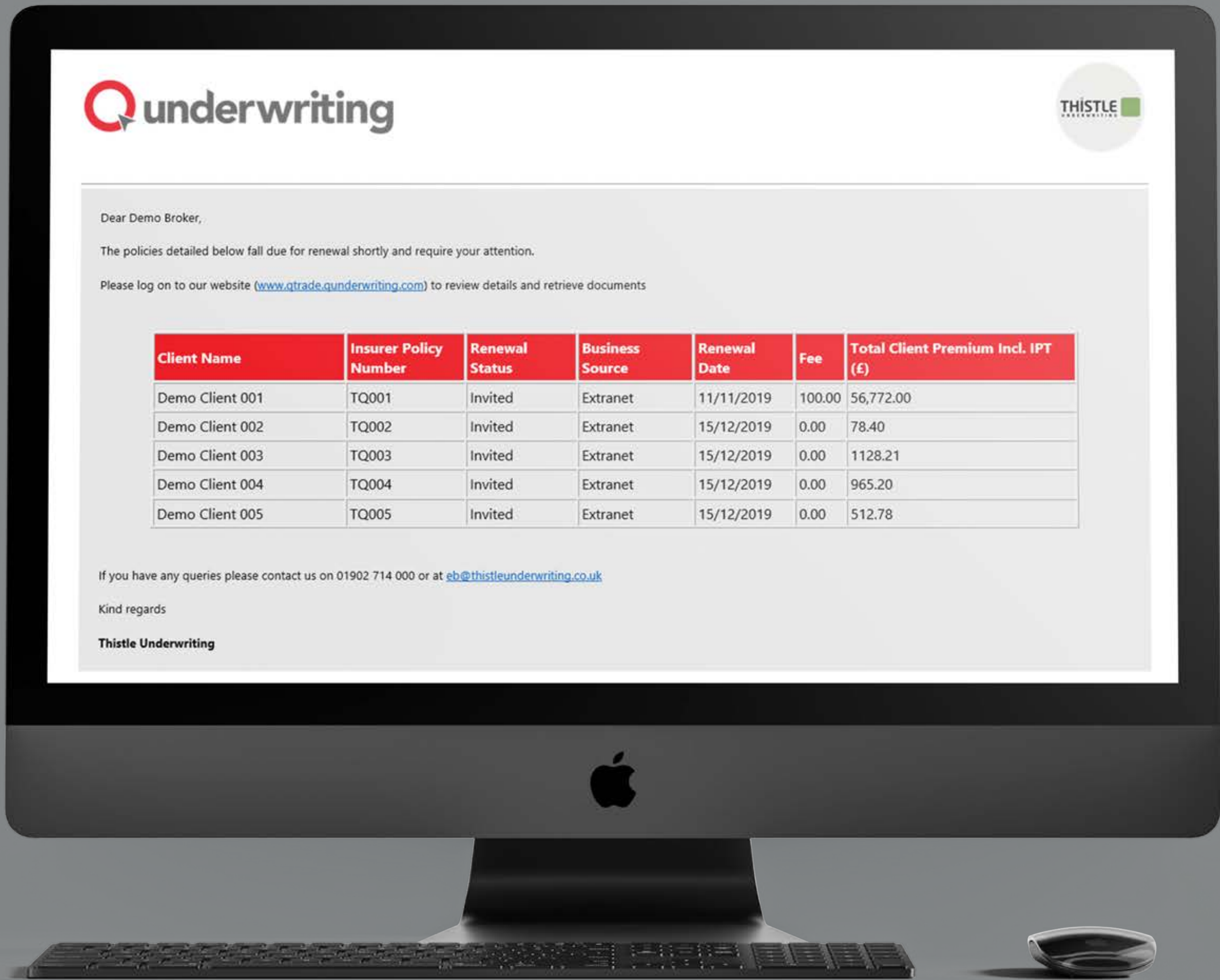
Renewals

Screen 6
You can access renewals either from the client profile or from the renewals dashboard.

Screen 7
The renewals dashboard will display upcoming renewals for all clients in your office. You can use the filters and search options to refund the results. Click 'view' to see the retrieve the quote information. From this page you can either abandon the renewal or pay by broker account; if the buttons are unavailable, please speak to your usual underwriting contact or get in touch using the phone number displayed on the sidebar.

Renewals from legacy systems will be included on client profiles as well as on the renewals dashboard.

Screen 8 **Renewals Bulletin**



Dear Demo Broker,

The policies detailed below fall due for renewal shortly and require your attention.

Please log on to our website (www.qtrade.qunderwriting.com) to review details and retrieve documents

Client Name	Insurer Policy Number	Renewal Status	Business Source	Renewal Date	Fee	Total Client Premium Incl. IPT (£)
Demo Client 001	TQ001	Invited	Extranet	11/11/2019	100.00	56,772.00
Demo Client 002	TQ002	Invited	Extranet	15/12/2019	0.00	78.40
Demo Client 003	TQ003	Invited	Extranet	15/12/2019	0.00	1128.21
Demo Client 004	TQ004	Invited	Extranet	15/12/2019	0.00	965.20
Demo Client 005	TQ005	Invited	Extranet	15/12/2019	0.00	512.78

If you have any queries please contact us on 01902 714 000 or at eb@thistleunderwriting.co.uk

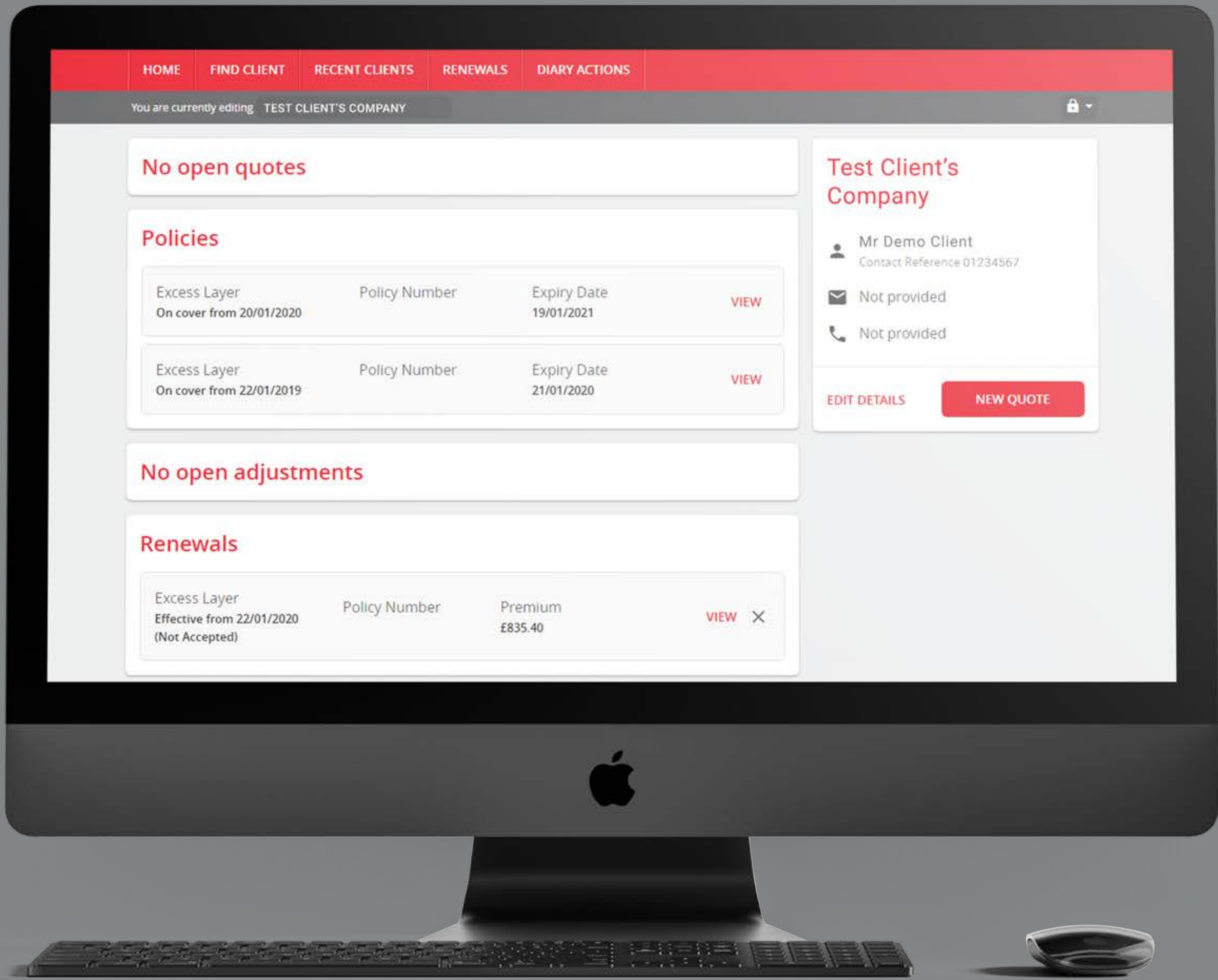
Kind regards

Thistle Underwriting

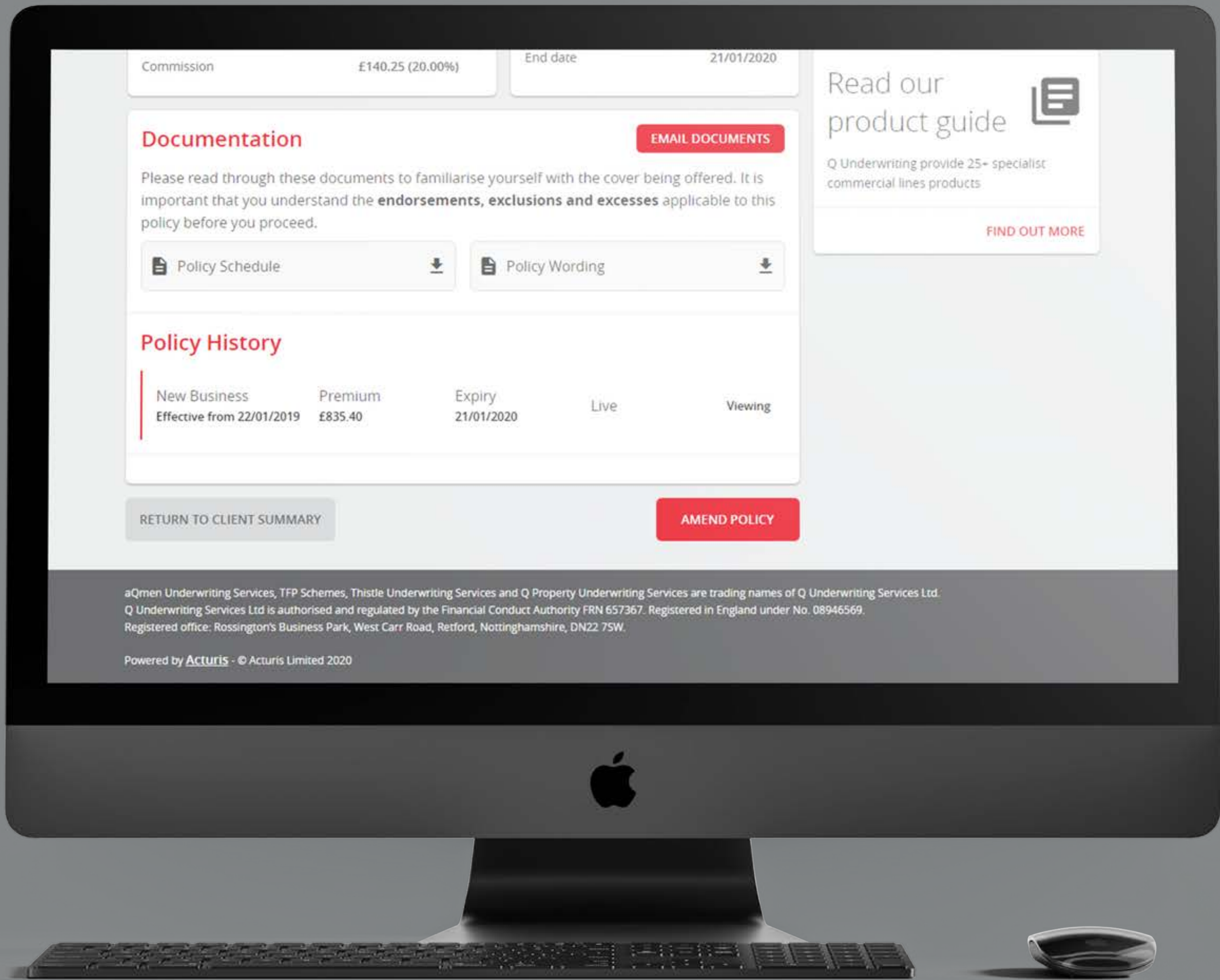
Renewals Bulletin

A nominated member of your staff will receive an auto-generated monthly Renewals Bulletin. You will receive a bulletin for each brand you trade with via Qtrade. You can see an example of this on screen 8, above.

Screen 9 MTAs / Adjustments / Cancellations



Screen 10 MTAs / Adjustments / Cancellations

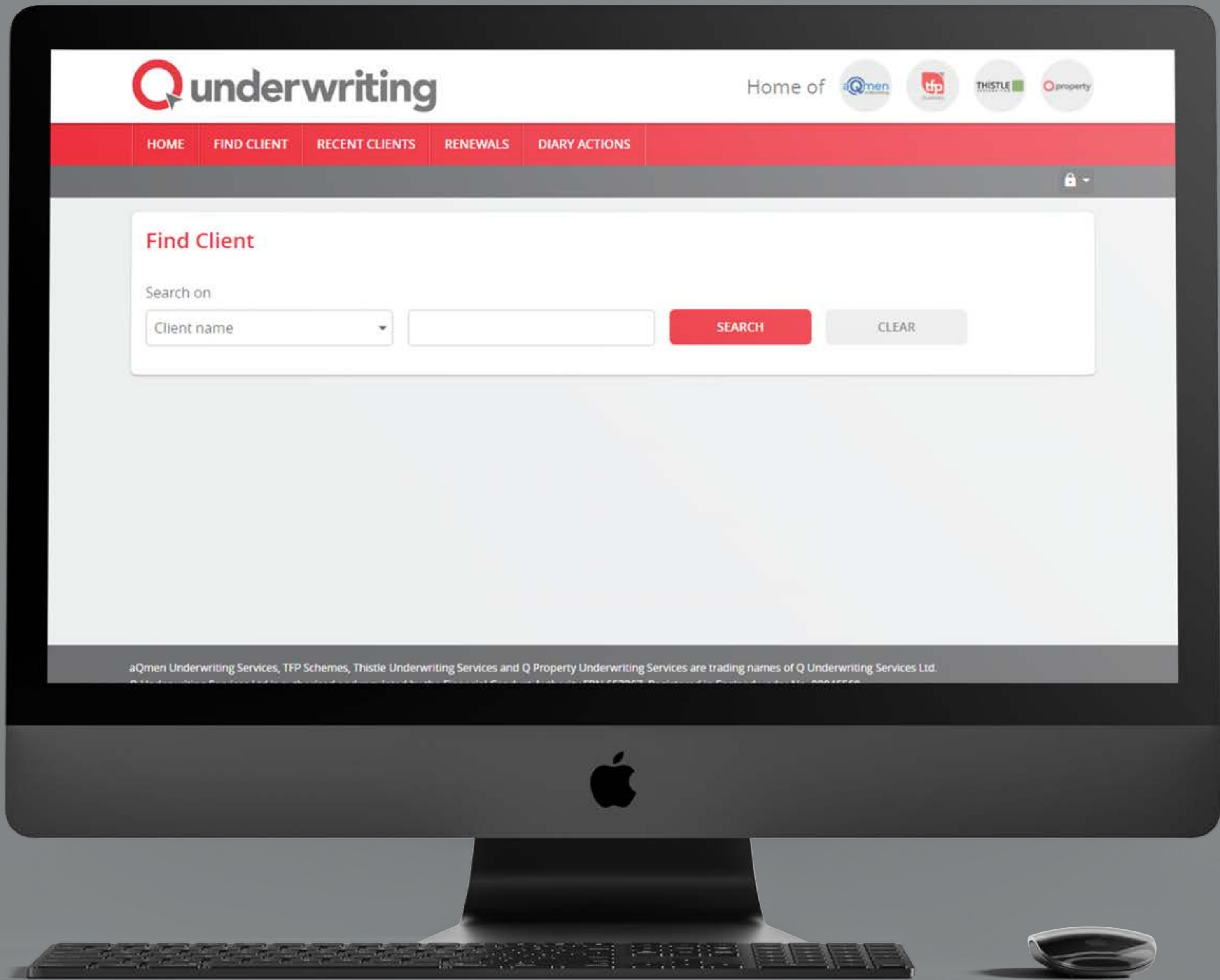


MTAs / Adjustments / Cancellations

Use the ‘find client’ menu link and search for a client to view their profile. Click ‘view’ on the policy you wish to amend or cancel, then scroll down and choose ‘amend policy’; complete the MTA effective date and then you can go through the risk capture process again in order to make adjustments.

If the ‘amend policy’ option is unavailable, or you wish to cancel the policy, please speak to your usual underwriting contact or get in touch using the phone number displayed on the sidebar.

Screen 11 Policies and Documentation



Policies and Documentation

Use the 'find client' menu link and search for a client to view their profile. Click 'view' on the policy you wish to explore. From the policy page, you can request an email copy of the documentation as well as accessing relevant policy wordings and statements of fact.

FAQs, Errors & Support

Please read through the FAQs and errors below.
If you are unable to find help for the issue you are experiencing, please contact **Qtrade@Qunderwriting.com** with full information about the issue including the date and time, a description of what you were trying to do and what has happened, plus any screenshots you can send to help us.

Frequently Asked Questions

Forgotten Password / Unable to Login

Click the 'forgotten your password' link on the login page.

Changing Password

Click the Padlock Icon on next to your email address when logged in and choose 'change password', then enter your current password and your new one.

Unable to access Qtrade

Please ensure you are on the correct website: **https://qtrade.qunderwriting.com/**. If the website is still not loading, please visit **www.Qunderwriting.com/Qtrade** to check for system maintenance notifications or email **Qtrade@Qunderwriting.com**.

I've received an error message

Either follow the instructions on the error message or try to carry out the transaction again. If this doesn't work, please take a screenshot of the error message and email **Qtrade@Qunderwriting.com**, explaining what has happened so that we can investigate.

Accounts Issues

No Qtrade Invitation?

If you don't receive a Qtrade Invitation Email and you are expecting one, please complete the New User Request form: **www.Qunderwriting.com/Qtrade/new-user**

Qtrade Invitation Not Working

If the link in your Qtrade Invitation Email does not work, please forward the invitation email to **Qtrade@Qunderwriting.com**, explaining what has happened, and we will reissue your invitation

Qtrade Registrations Not Working

If the Qtrade Registration Email does not arrive, please click the 'take me to my account' link in the Qtrade Invitation Email again and re-enter your email address, ensuring that this is correct.

If the Qtrade Registration Email still doesn't arrive, please forward the invitation email to **Qtrade@Qunderwriting.com**, explaining what has happened, and we will reissue your invitation.

Business Postcode Validation Failed

If the Business Postcode stage fails to verify, please ensure you have tried the postcode for:

1) Your office or branch
2) Your head office (if applicable)
3) Your registered office (if applicable)

If the Business Postcode stage still fails to verify, please forward the registration email to **Qtrade@Qunderwriting.com**, explaining what has happened, and we will reissue your invitation.

Missing Products

If you believe there are products missing from the portal, please email **Qtrade@Qunderwriting.com** explaining which products you believe are missing and we will look into this for you.

Support

For support, please contact your usual underwriting contact or email **Qtrade@Qunderwriting.com**

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