

BROKER WEB PORTAL

Instructions

V 1.1

A REMINDER

All activities within our Broker Portal are governed by our Web
Portal Usage TOBA (Electronic Trading TOBA)
in addition to our Standard TOBA

Broker Web Portal

Help Sheet #1

This document will assist you in how to:

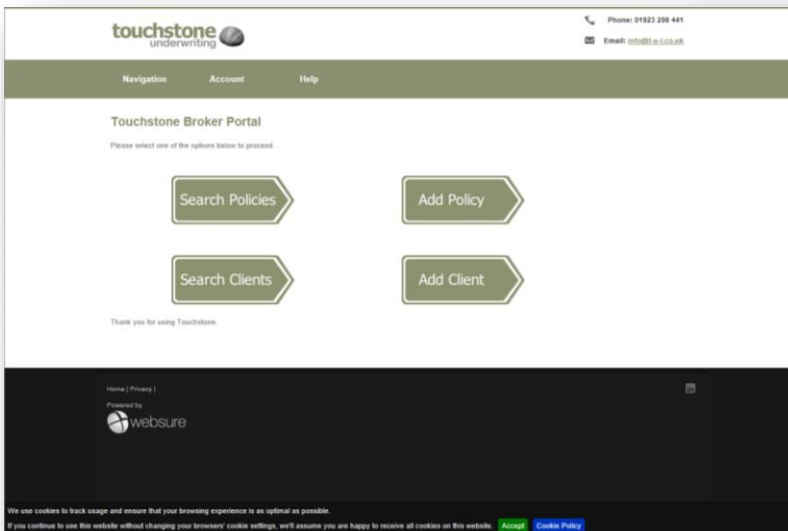
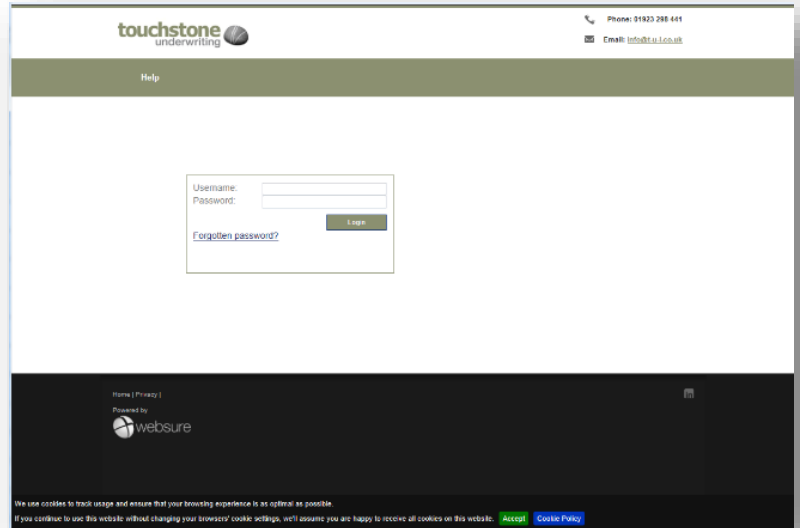
- Log into the broker portal
- Find / Add a Client
- Find / Add a Policy

First go to the Touchstone Underwriting website www.t-u-l.co.uk from here please select the link for the **Broker Portal**. You should see a screen similar to this

Here you should type in your **user name** and your **password**

Note on accessing the site the very first time it may prompt you to amend your password.

Please remember that you should keep these log in details safe and secure. You must not divulge your log in details to anyone.



Once logged in you will see the following

Here you may:

Search for a Policy / Client
Add a new Policy / Client

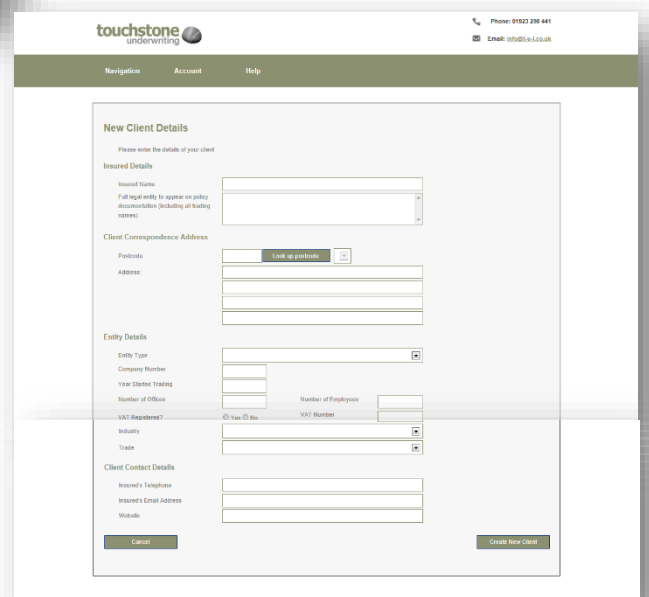
Adding a new Client

Obviously, first check that you do not already have your client on the database

Then ensure that all fields are completed

Once fully complete click the **Create New Client**

If you do not wish to add the Client please click **Cancel**



Broker Web Portal

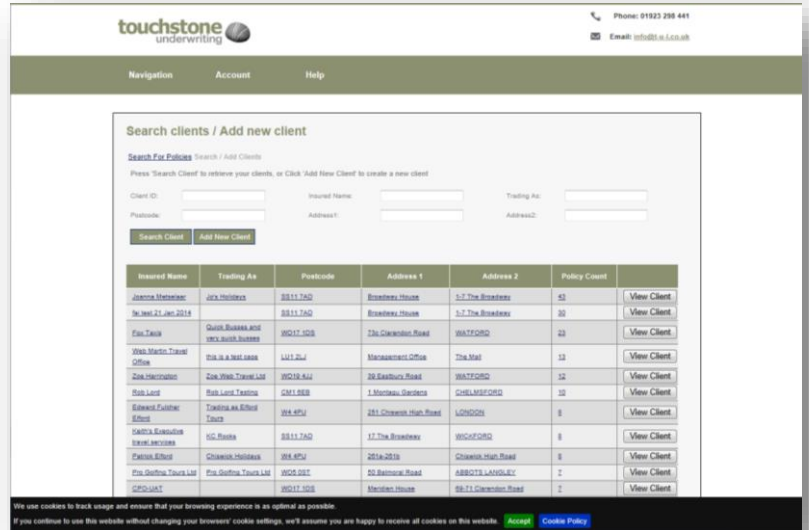
Help Sheet #1

Searching for a Client

It will by default list all Clients by name (a-z and 15 to a page) please note that other pages may be accessed using the numbers at the bottom.

However to search directly for a Client utilise one or more (if you wish to narrow a search) of the fields:

- Client ID
- Insured Name
- Trading as
- Postcode
- Address 1
- Address 2



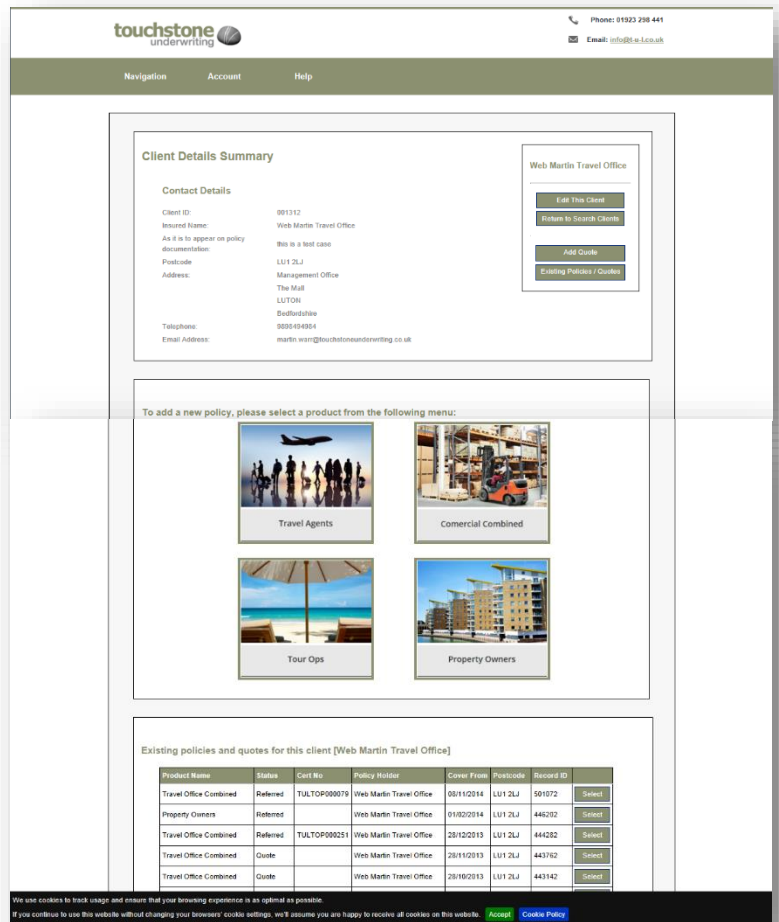
The wild card character is an *

So searching for smith* would find anything beginning with the letters smith (eg smith and sons)

Searching for *smith* would find anything with the letters of smith contained within in it (eg shoe smith enterprises)

Once found use the **View Client**

You will see a summary of the client and be able to; add a policy and (scroll the page down) view any policy the client may have



From here you may **Add a New Policy** of a product type listed under you user log in detail

Or **Select** a current Policy / Quote

Adding a New Policy

Takes you to the pages to complete the various questions and statements

Utilise the **Next** button you will see on the bottom of the page.

Some points to note:

Ensure you enter the Full Legal Entity to be covered, failure to do so may result in a loss being declined

Ensure accurate entry of your clients answers concerning the risk

Where Multi Premises is available under a contract (eg Travel Office; Property Owners etc)

First add all the risk addresses using the **Add Additional Premise**

Then select each of them in turn to complete the fields for each Risk Address

The Tabs at the top allow you see where you are in the policy details input / quotation process.

For each Risk Premise you will have to **confirm** that the entries for the premise are complete

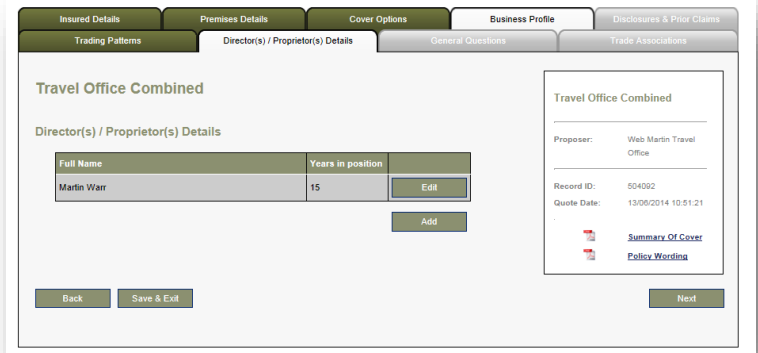
If you have multi locations please ensure you select the **Premise Summary** button to take you back to the Risk Location listing

Please Note:

Where a field has no value (eg number of home Policy workers is nil or a sum insured is nil) please ensure a zero is entered

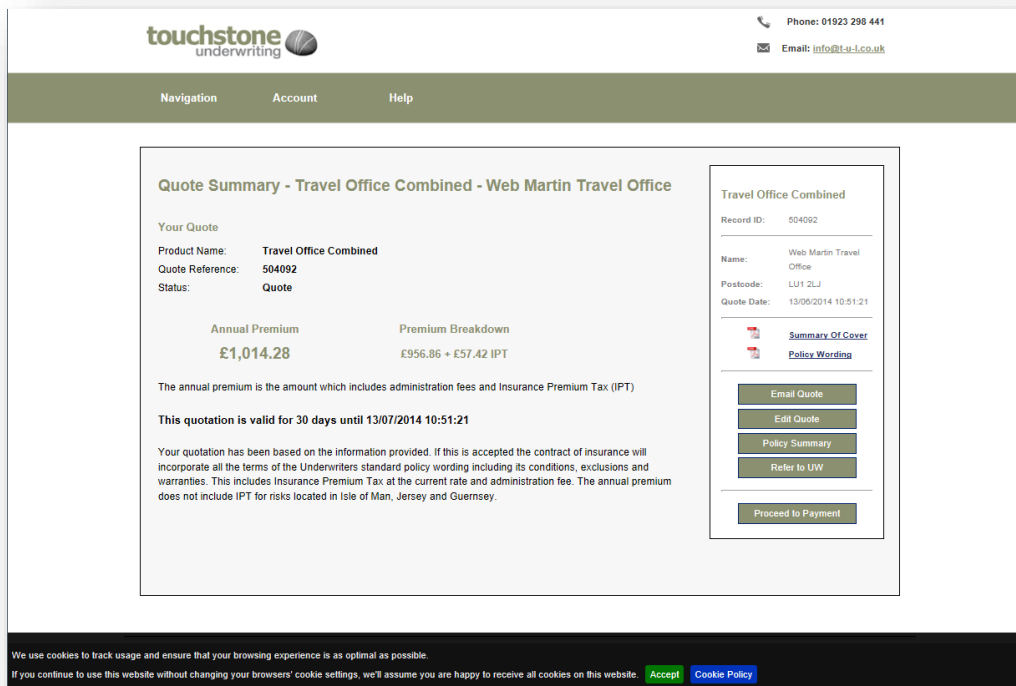
Where the field entry allows multiple answers please utilise the **Add** button to add additional entries

You should also note that there is a **Save & Exit** button which will allow you to save where you are in the policy process and come back to it another time



Note: Previous Insurer Details is a compulsory field, and therefore should be completed in full

Once completed and confirmed the declaration you will either see the **Quotation** page or you may see a **Refer** to underwriters page



You are then able to;

- **Email Quote** this will email the Quotation documentation to you
- **Edit Quote** this will take you back through the screens to edit a field etc
- **Policy Summary** this will take you to the Policy Menu screen
- **Refer to UW** this will allow you to refer the quotation to the Underwriter, should you require to
- **Proceed to Payment** this will bind the policy cover, based on the date you selected in the **Expected Commence Date**.

touchstone underwriting Phone: 01923 298 441 Email: info@t-u-l.co.uk

Navigation Account Help

Incept Cover - Travel Office Combined - Web Martin Travel Office

Premium Quotation

Premium	£956.86
IPT	£57.42
Commission	£143.53

The proposal/statement of fact, together with any other information supplied to the Insurer, must not be misleading or incomplete and shall form the basis of the contract with the Insurer and shall be incorporated therein.

If you are aware (having made all due enquiries) of any information not specifically requested in the proposal/statement of fact but which would have a material bearing upon the Insurers' decision on whether or not to provide cover to the Insured or the terms upon which such cover would be provided, you must notify the Insurer of it before the contract of insurance is concluded and obtain their specific confirmation that they are willing to proceed.

The certificate terms, conditions, exclusions and warranties which will apply to this quotation and the insurance cover to which it relates will be as per the quotation document and the certificate wording. The certificate wording can be accessed by clicking the button above.

Payment Method:

Agree to Terms

Travel Office Combined
Record ID: 504092
Proposer: Web Martin Travel Office
Postcode: LU1 2LJ

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Note

Please ensure you read the statement carefully, each time.

All transactions for policies bound are due to us, and must be settled in accordance with the terms as detailed in our TOBA

Policy OnRisk Confirmation

Your Policy

Product Name: **Travel Office Combined**
Certificate Number: **TULXXX000328**
Status: **OnRisk**

Your policy is now OnRisk and a confirmation email has been sent to: bikaka.ekwa@ameshallam.co.uk

Annual Premium	Premium Breakdown
£1,014.28	£956.86 + £57.42 IPT

The annual premium is the amount which includes administration fees and Insurance Premium Tax (IPT)

The following documents have been created for this policy. You will receive an email with your Debit Note, Schedule and Statement Of Fact. You can also reprint these documents below if you wish.

Description	Created	View
Statement Of Fact	13/06/2014 11:48:51	<input type="button" value="View"/>
Policy Wording	13/06/2014 11:48:51	<input type="button" value="View"/>
Summary Of Cover	13/06/2014 11:48:51	<input type="button" value="View"/>
Schedule	13/06/2014 11:48:48	<input type="button" value="View"/>
Debit Note	13/06/2014 11:48:41	<input type="button" value="View"/>

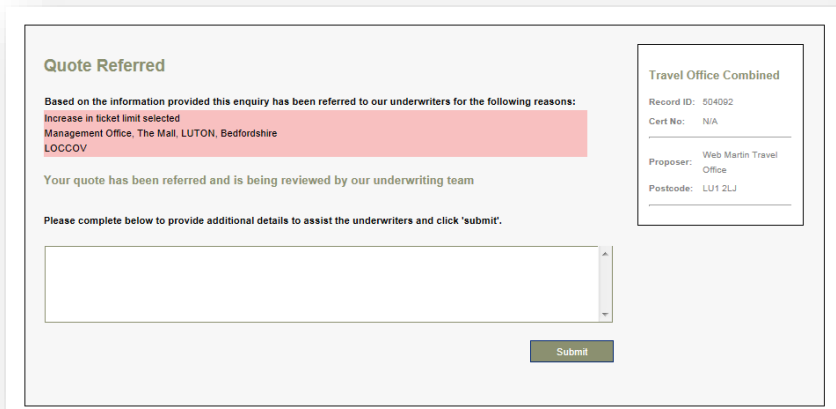
Travel Office Combined
Record ID: 504092
Cert No: TULXXX000328
Proposer: Web Martin Travel Office
Postcode: LU1 2LJ

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You will additionally be emailed the policy documentation etc

Broker Web Portal

Help Sheet #1



Quote Referred

Based on the information provided this enquiry has been referred to our underwriters for the following reasons:
Increase in ticket limit selected
Management Office, The Mall, LUTON, Bedfordshire
LOCCOV

Your quote has been referred and is being reviewed by our underwriting team

Please complete below to provide additional details to assist the underwriters and click 'submit'.

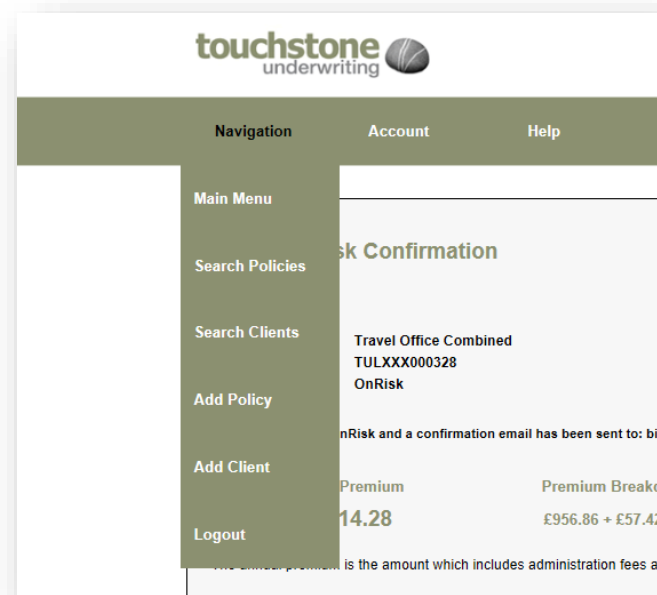
Travel Office Combined
Record ID: 504092
Cert No: N/A
Proposer: Web Martin Travel Office
Postcode: LU1 2LJ


Submit

Should the case **Refer** you as a broker have the ability to add additional details to assist the underwriter.

Please ensure you add something meaningful to assist the Underwriter.

The Underwriter will then pick up this **Refer** in our back office system, deal with the enquiry and then email you back / or telephone you once resolved. Then where applicable you will be able to log back into the Web Portal search and pick up the policy to proceed where required.



touchstone
underwriting 

Navigation Account Help

Main Menu
Search Policies
Search Clients
Add Policy
Add Client
Logout

Risk Confirmation

Travel Office Combined
TULXXX000328
OnRisk

OnRisk and a confirmation email has been sent to: bil

Premium 14.28 Premium Breakdown £956.86 + £57.42

is the amount which includes administration fees at

Other General Navigation

Along the top green bar you are able to navigate to various menu items, as shown

This is also where you **Logout**

Add any notes you may have here:

remember previous insurer details are required they are compulsory