

# View and manage your Tradex policy online



## View your policy details, including current vehicle list

- ✓ Dashboard of your key policy details
- ✓ Policy Schedule document
- ✓ Contact details
- ✓ Payment Plan (if taken out)
- ✓ Drivers on the policy
- ✓ Vehicles and trade plates
- ✓ Current vehicle & trade plate list



## Help and Assistance

- ✓ Claims page with contact details and claims procedures
- ✓ Help page and step by step user guide
- ✓ Contact page with all key contact numbers



## Update your MID online - receive instant confirmation

- ✓ Add/delete vehicles & trade plates to your policy
- ✓ Submit up to 10 updates in one transaction
- ✓ View and print your current vehicle list
- ✓ Receive instant confirmation
- ✓ Available for motor trade policies



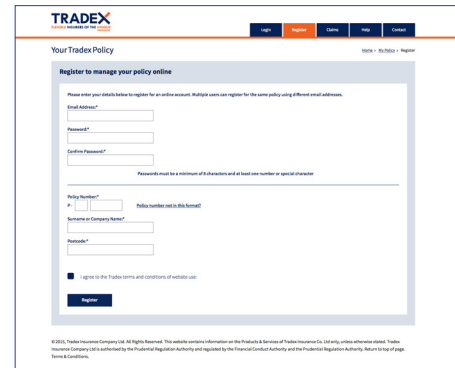
## Compatible with mobile, tablet and desktop device

- ✓ You can access all features of the portal now on all devices
- ✓ Easily update your MID on your smartphone and view your current vehicle list on the go!

# Tradex Customer Portal Guide

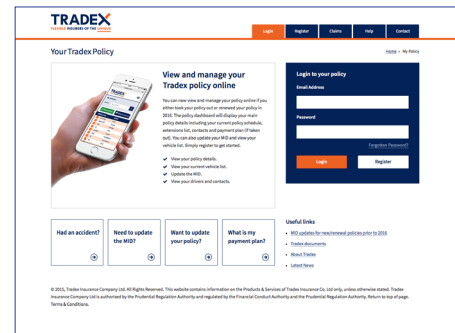
## 1 Register

- 1.1 Click on "Register" tab: [www.customerportal.tradex.com](http://www.customerportal.tradex.com)
- 1.2 Complete your email address and create an online password.  
*Multiple users can register for the same policy using different email addresses.*
- 1.3 Enter your policy number, surname and postcode  
*if a limited company, confirm your company name.*
- 1.4 Agree to the terms and conditions and click "Register".
- 1.5 Verify your email address on the email received in your mail box. You are now ready to login.



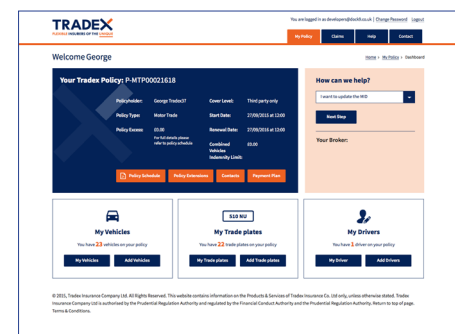
## 2 Login

- 2.1 Click on "Login" tab
- 2.2 Enter your registered email address, password and click "Login"
- 2.3 The dashboard will display your policy. If you have more than one policy, select the policy you would like to view.
- 2.4 Forogotton password? - click on "Forogotton Password" link.
  - Enter your email, click "Reset".
  - Choose a new password on the email received.
- 2.5 Change password? - Login to your account.
  - Click on "Change Password" link in the menu bar.
  - Enter current and new password and click "Save"



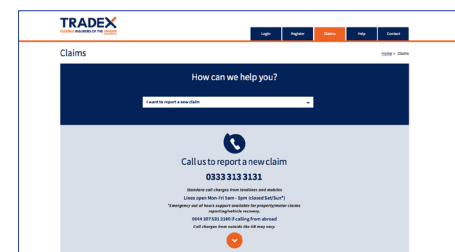
## 3 Dashboard

- 3.1 View your key policy details.
- 3.2 View your policy schedule, contacts and payment plan (if taken out).
- 3.3 View your vehicles, trade plate and drivers
- 3.4 View your broker details - name and contact number.
- 3.5 How can we help? Select and click "Next Step"  
-directs you to the relevant information on the help page.



## 4 Claims - Help - Contact Pages

- 4.1 Claims page - view how to report a new claim, windscreen claim, book roadside recovery or discuss an existing claim. Also view our claims and complaints procedures.
- 4.2 Help page - View the most popular questions and answers and step by step portal guide.
- 4.3 Contact page - How to contact Tradex and your Broker



# How to update your MID

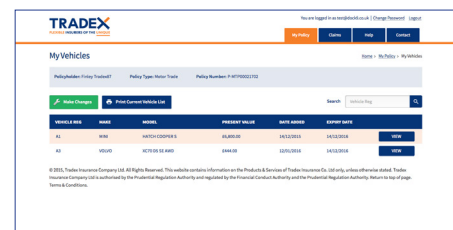
## 1 Login

- 1.1 You can access via your mobile, tablet, laptop or PC
- 1.2 Login to the Tradex Customer Portal  
If you have not already registered - please refer to "Register"
- 1.3 Click on "My Vehicles" button  
then click on "Make Changes"
- 1.4 For a shortcut you can click the "Add Vehicles" button



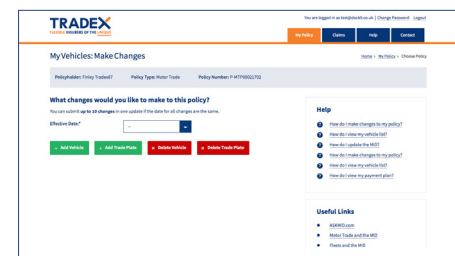
## 2 Vehicle List

- 2.1 View your current vehicle list
- 2.2 Click "View" to view further details of the vehicle
- 2.3 Click "Print" to print your vehicle list
- 2.4 Cant see your vehicle?  
Only current vehicles appear on the list  
If a vehicle is in review, it will not appear until accepted  
Please contact your broker if you have any queries



## 3 Make Changes - Add/Delete Vehicle or Trade Plate

- 3.1 Click "Make Changes"  
*you can make up to 10 changes in one update*
- 3.2 Select effective time/date  
*all updates must be effective on the same date*
- 3.3 Select "Add Vehicle"  
Input vehicle Reg and complete questionnaire  
Click "Add Vehicle" - takes you to the submission page
- 3.4 Select "Delete Vehicle"  
Select vehicle reg



## 4 Submission

- 4.1 Submit Changes - click "Submit all changes"  
Are you sure you want to proceed with the changes?  
click "ok"
- 4.2 You will receive confirmation if your changes are accepted  
The vehicle/trade plate list will be updated
- 4.3 If your changes are being considered you will be notified  
*If you have any queries please contact your broker*

