

### customerportal.tradex.com

# View and manage your Tradex policy online





# View your policy details, including current vehicle list

- Dashboard of your key policy details
- Contact details
- Payment Plan (if taken out)
- Drivers on the policy
- Vehicles and trade plates on the policy



#### Help and Assistance

- Help page and step by step user guide
- Contact page with all key contact numbers



#### Update your vehicle list online

- 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 vehicle list on your smartphone and view your current vehicle list on the go!



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## **Tradex Customer Portal Guide**

#### Register

- 1.1 Click on "Register" tab: www.customerportal.tradex.com
- **1.2** Input 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 mailbox. You are now ready to login.

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Register to manage your policy online
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#### Login

**2.1** Enter your registered email address, password and click "Login"

**2.2** The dashboard will display your policy. If you have more than one policy, select the policy you would like to view.

- 2.3 Forgotten password? click on "Forgotten Password" link.
  - Enter your email, click "Reset".
  - Choose a new password on the email received.
- 2.4 Change password? Login to your policy.
  - Select "Change Password" link in the menu bar.
  - Enter current and new password and click "Save"

**2.5** Reactivate account? - Enter your password and the account will be reactivated.

#### Dashboard

- 3.1 View your key policy details.
- 3.2 View your vehicles, trade plate and drivers.
- 3.3 View your broker details name and contact number.
- **3.4** How can we help? Select and click "Next Step" *This directs you to the relevant information and/or page.*



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#### **Help - Contact Pages**

4.1 Help page - View the most popular questions and answers.

You can also view our complaints procedures.

4.2 Contact page - How to contact Tradex and your Broker

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## How to update your policy



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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" - If you have not accessed your account for over
  - 90 days you will need to reactivate your account.



#### **Vehicle List**

**2.1** Click on "My Vehicles" or "My Trade plates" button then click on "Make Changes

**2.2** For a shortcut you can click the "Add Vehicles" or "Add Trade plates" button

- 2.3 Click "Print" to print your current vehicle list
- 2.4 Cant see your vehicle? Only current vehicles appear on the list. If a vehicle is in review, it will <u>NOT</u> appear until accepted. Please contact your broker if you have any queries.

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#### Make Changes - Add/Delete Vehicles or Trade Plates

- **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" or " Add Trade plate" Complete questionnaire, Click "Add Vehicle" or 'Delete Vehicle".
- 3.4 Select "Delete Vehicle" or 'Delete Trade plate" Complete questionnaire, Click "Delete Vehicle" or 'Delete Trade plate".

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### Submission

- 4.1 Submit Changes click "Submit all changes" Are you sure you want to proceed with the changes? if you are 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.

