

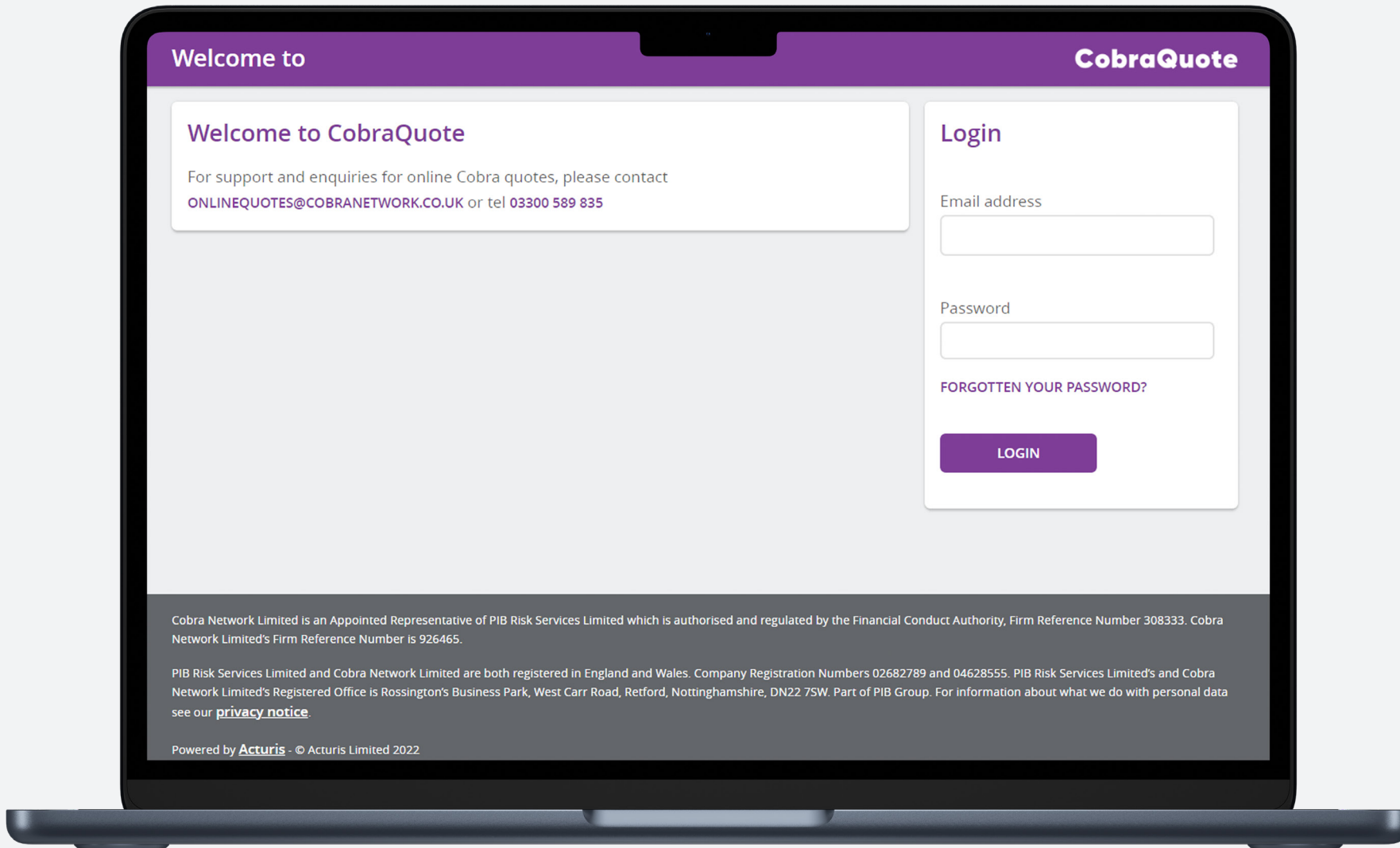
# CobraQuote

User Guide  
January 2023

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## Login / Welcome Page:



# Introduction

CobraQuote is the new E-trade solution from Cobra Network. Powered by Acturis, CobraQuote brings together 8 E-trade commercial products onto one platform, making trading easier than ever.

The portal has been designed to be broker-centric and intuitive. This guide will explain the basics as well as some troubleshooting and error-handling. Should you have any queries, you can call 0330 589 835 or email [Onlinequotes@cobranetwork.co.uk](mailto:Onlinequotes@cobranetwork.co.uk)

# Accounts

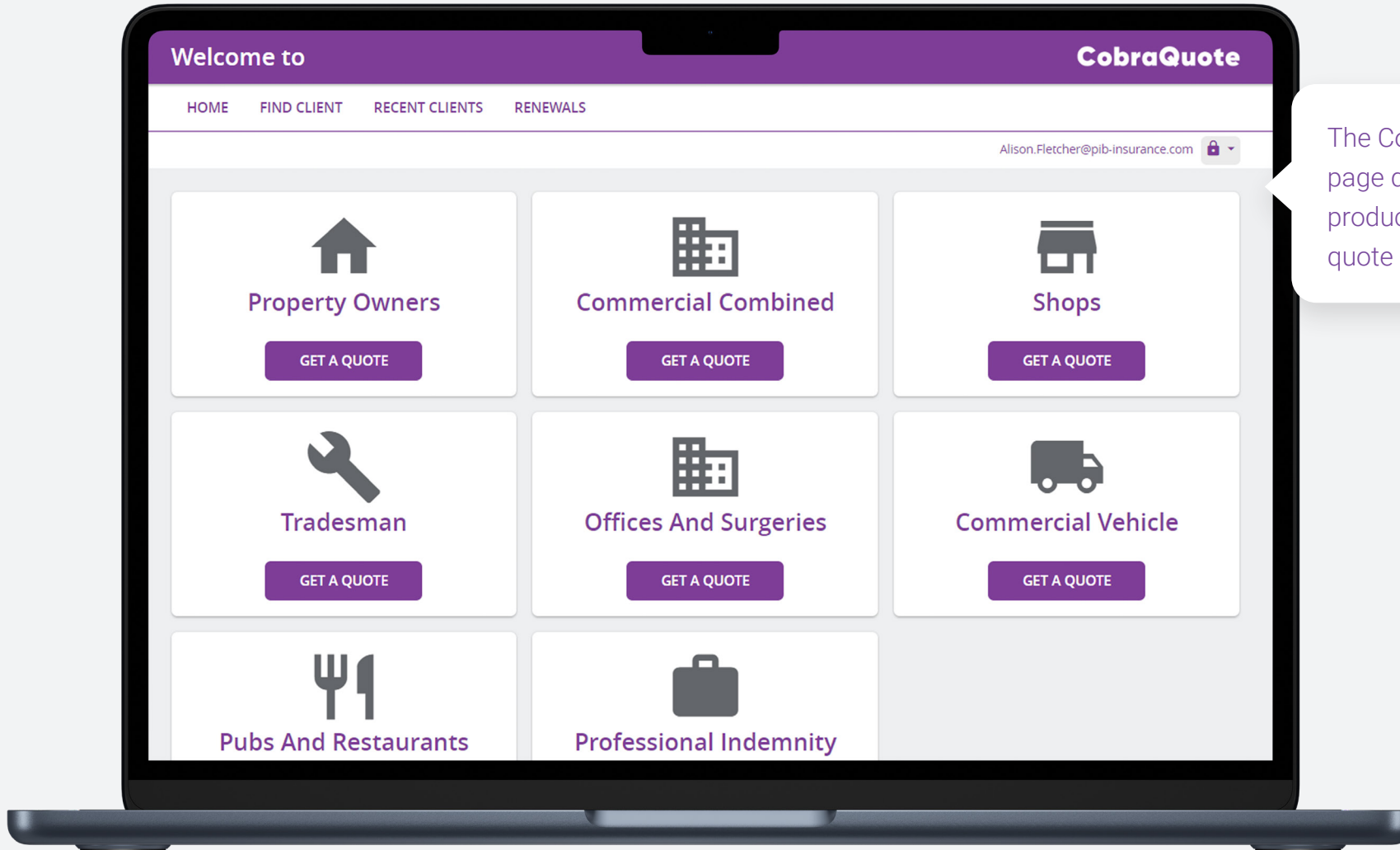
## New Accounts

1. Click the 'take me to my account' link in the CobraQuote invitation email
2. Confirm your email address
3. Click the 'complete registration' link in the CobraQuote 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 CobraQuote 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

## Home & Product Selection Page:



The CobraQuote home page displays the E-trade products available for quote and bind.

# Basic Navigation

## New Clients

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

## Existing Clients

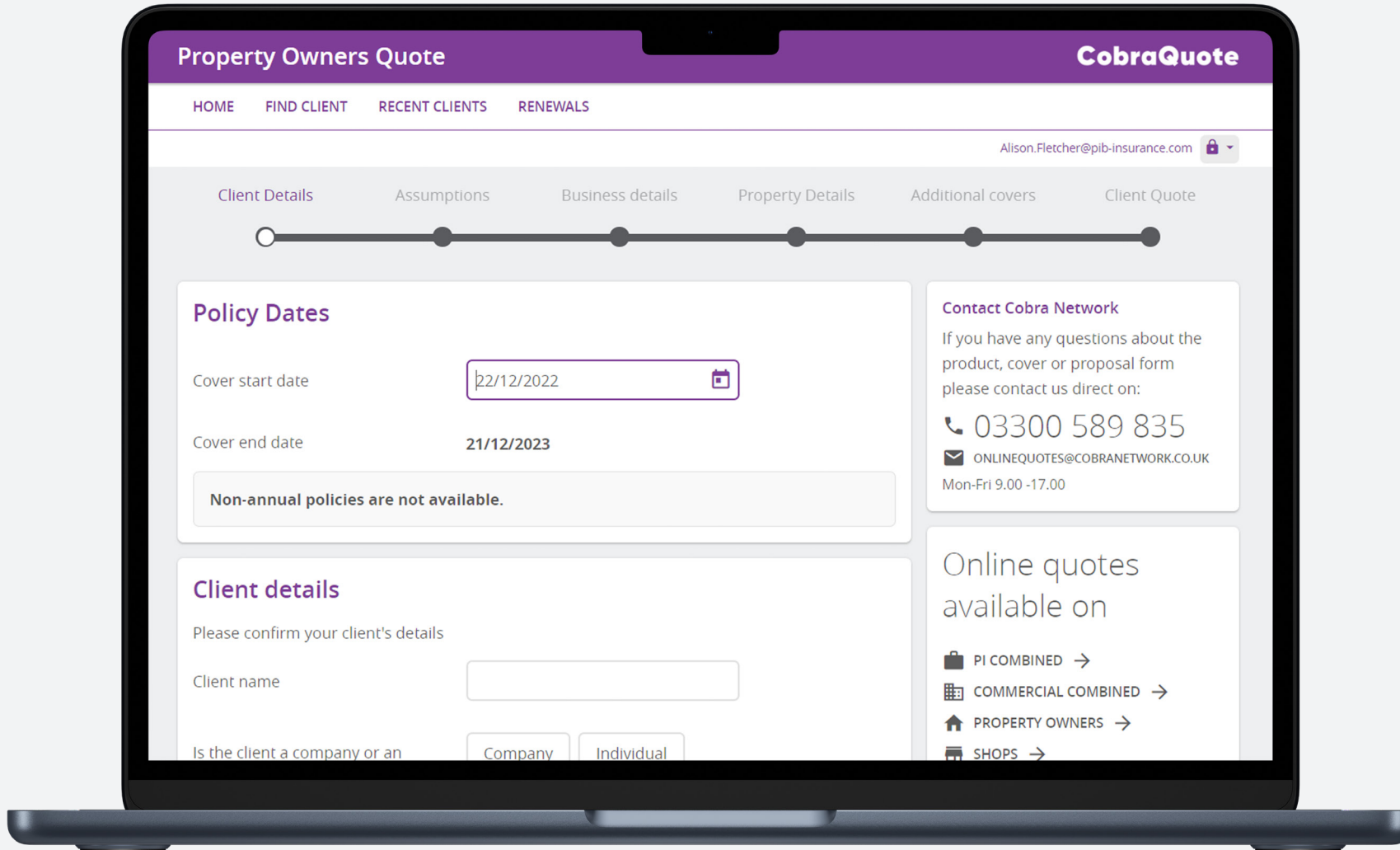
- Existing clients can be found from the 'find client' menu link.
- Existing clients can be amended by locating them and choosing Edit Details on their profile.
- The 'recent clients' menu link will display the client profiles you have recently accessed.

## Getting in touch

Should you have any queries, you can call the contact details that appear in the side bar: 0330 589 835 or email [Onlinequotes@cobranetwork.co.uk](mailto:Onlinequotes@cobranetwork.co.uk)



## New Quotes:





# New Quotes

You can get a quote by clicking the 'Get a Quote' button on the required product tile. You will be navigated to enter the data required. For existing clients, some of the client data will be pre-populated. It is your responsibility to check that any pre-populated data remains correct.

Complete all screens to submit a new quote.

Some quotes cannot be provided online and you will need to contact the Cobra Network Broking Desk to proceed with the quote. Please use the phone number or email address displayed on the sidebar.

If you wish to re-open a quote, go to the Client Summary page (either using 'Find Client', or 'Recent Client' searches). Find the quote you wish to open and click on 'View' (if it has already been submitted for quote), or 'Continue' if you need to complete it.

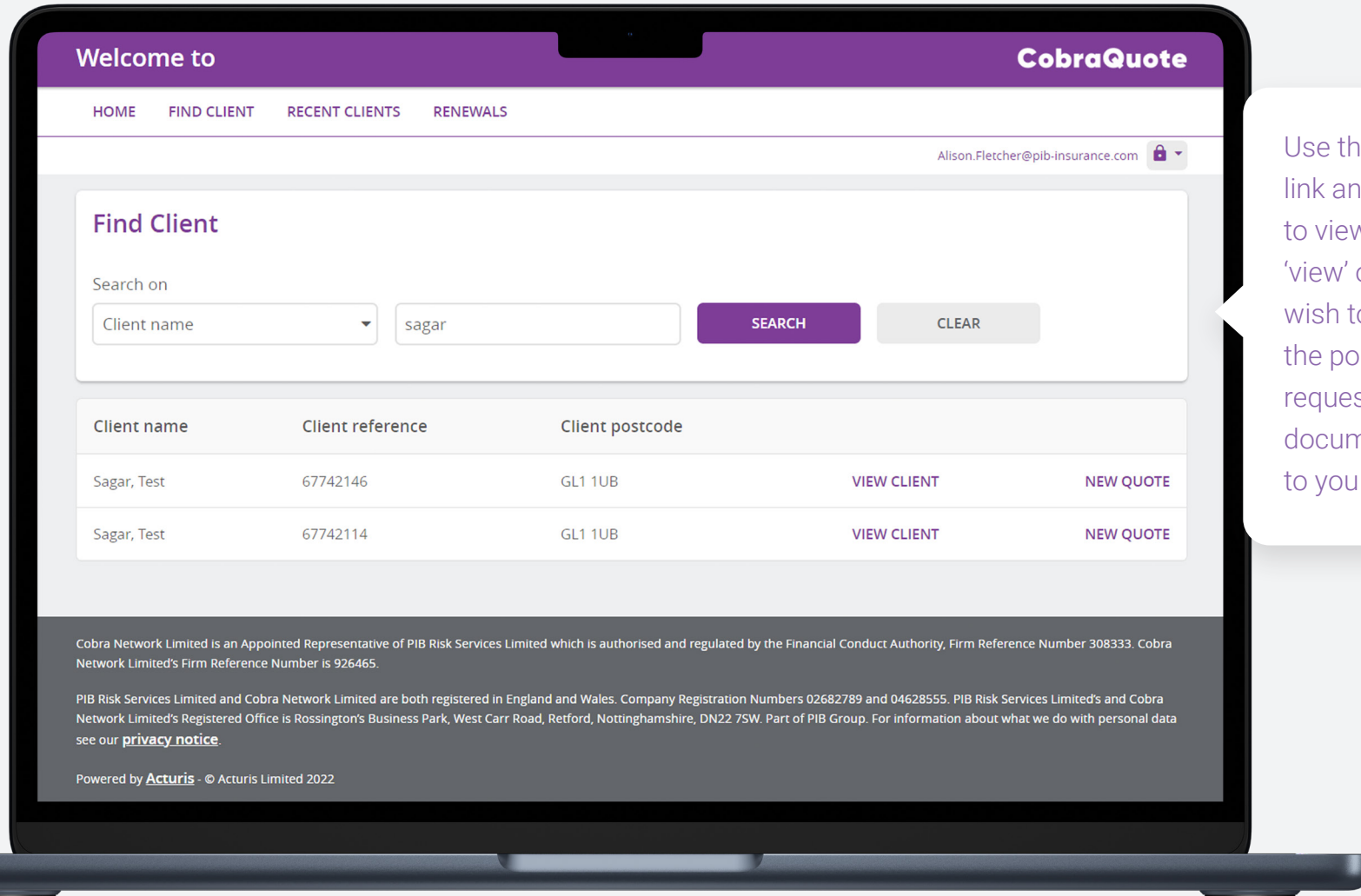
# MTAs / Adjustments / Cancellations

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, use the contact phone number or email address displayed on the sidebar to get in touch.



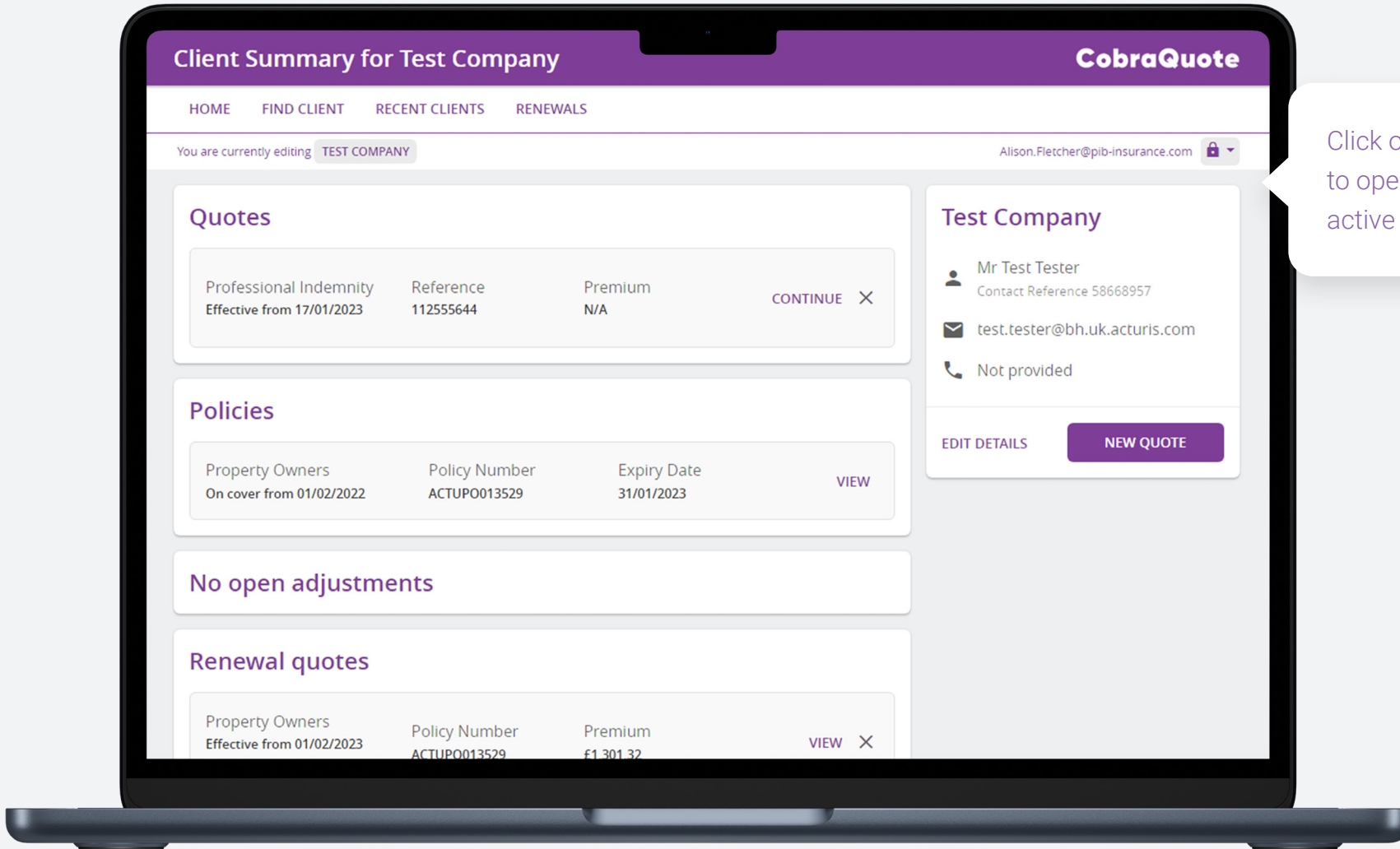
## Policies and Documentation:



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 a copy of the documentation to be sent to you by e-mail.



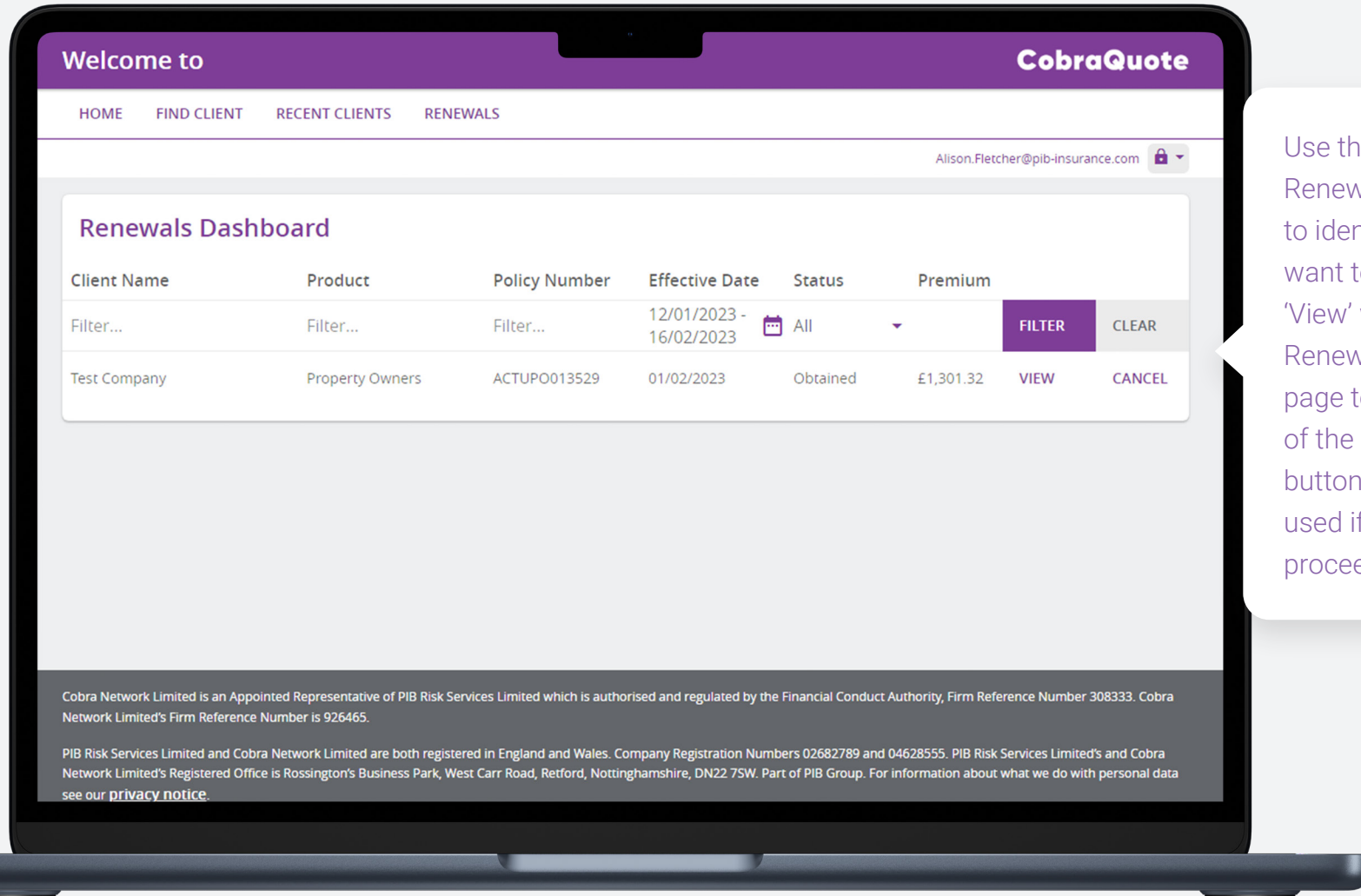
## Client Summary:



Click on 'View' or 'Continue' to open the details for any active quotes or policies.



## Renewals:



Use the filters in the Renewals Dashboard page to identify the renewals you want to review. Clicking 'View' will take you to the Renewal Quote Summary page to review the terms of the renewal. The 'Cancel' button should only be used if you do not wish to proceed with the renewal.

Cobra Network Limited is an Appointed Representative of PIB Risk Services Limited which is authorised and regulated by the Financial Conduct Authority, Firm Reference Number 308333. Cobra Network Limited's Firm Reference Number is 926465.

PIB Risk Services Limited and Cobra Network Limited are both registered in England and Wales. Company Registration Numbers 02682789 and 04628555. PIB Risk Services Limited's and Cobra Network Limited's Registered Office is Rossington's Business Park, West Carr Road, Retford, Nottinghamshire, DN22 7SW. Part of PIB Group. For information about what we do with personal data see our [privacy notice](#).

# Renewals

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

The renewals dashboard will display upcoming renewals for all clients. You can use the filters and search options to refine the results. Click 'view' to see the quote information. From this page you can pay by broker account. If the buttons are unavailable, please get in contact using the phone number or email address displayed on the sidebar.

# Troubleshooting, Errors & Support

Please read through the following troubleshooting pages.

If you are unable to find help for the issue you are experiencing, please contact [Onlinequotes@cobranetwork.co.uk](mailto:Onlinequotes@cobranetwork.co.uk) 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.

# Troubleshooting

## **Forgotten Password / Unable to Login:**

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

## **Changing Password:**

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

## **Unable to access CobraQuote:**

Please ensure you are on the correct website: [quote.cobranetwork.co.uk](https://quote.cobranetwork.co.uk) If the website is still not loading, please check with your IT in the first instance to check for issues on your side. If this does not resolve it you can email [Onlinequotes@cobranetwork.co.uk](mailto:Onlinequotes@cobranetwork.co.uk)

## **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 [Onlinequotes@cobranetwork.co.uk](mailto:Onlinequotes@cobranetwork.co.uk) or call 0330 589 835, explaining what has happened so that we can investigate.



## Accounts Issues

### **No CobraQuote Invitation?**

If you don't receive a CobraQuote invitation email and you are expecting one, please email [Onlinequotes@cobranetwork.co.uk](mailto:Onlinequotes@cobranetwork.co.uk)

### **CobraQuote Invitation Not Working:**

If the link in your CobraQuote invitation email does not work, please forward the invitation email to [Onlinequotes@cobranetwork.co.uk](mailto:Onlinequotes@cobranetwork.co.uk), explaining what has happened, and we will reissue your invitation

### **CobraQuote Registrations Not Working:**

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

If the CobraQuote registration email still doesn't arrive, please forward the invitation email to [Onlinequotes@cobranetwork.co.uk](mailto:Onlinequotes@cobranetwork.co.uk) or call 0330 589 835, 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 [Onlinequotes@cobranetwork.co.uk](mailto:Onlinequotes@cobranetwork.co.uk), explaining what has happened, and we will reissue your invitation.

### **Missing Products:**

If you believe there are products missing from the portal, please email [Onlinequotes@cobranetwork.co.uk](mailto:Onlinequotes@cobranetwork.co.uk) explaining which products you believe are missing and we will look into this for you.

### **Support**

For support, please call: 0330 589 835 or email: [Onlinequotes@cobranetwork.co.uk](mailto:Onlinequotes@cobranetwork.co.uk)

# CobraQuote

[cobranetwork.co.uk](http://cobranetwork.co.uk)

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