

CobraQuote

User Guide January 2023

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Login / Welcome Page:

Welcome to	CobraQuote
Welcome to CobraQuote	Login
For support and enquiries for online Cobra quotes, please contact ONLINEQUOTES@COBRANETWORK.CO.UK or tel 03300 589 835	Email address
	Password
	FORGOTTEN YOUR PASSWORD?
	LOGIN
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PIB Risk Services Limited and Cobra Network Limited are both registered in England and Wales. Company Registration Num Network Limited's Registered Office is Rossington's Business Park, West Carr Road, Retford, Nottinghamshire, DN22 75W. P see our <u>privacy notice</u> .	bers 02682789 and 04628555. PIB Risk Services Limited's and Cobra art of PIB Group. For information about what we do with personal data
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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 troubleshoooting and error-handling. Should you have any queries, you can call 0330 589 835 or email 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 CobaQuote 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'
- 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:



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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

New Quotes:

Property Owners Quote CobraQuote					
OME FIND CLIENT RECENT CLIENTS RENEWALS					
	Alison.Fletcher@pib-insurance.com 🔒 🗸				
Client Details Assumptions Business details Property Detail	ils Additional covers Client Quote				
0	•				
Policy Dates	Contact Cobra Network				
	If you have any questions about the				
Cover start date 22/12/2022	please contact us direct on:				
Cover end date 21/12/2022	© 03300 589 835				
	ONLINEQUOTES@COBRANETWORK.CO.UK				
Non-annual policies are not available.	WOIPH 9.00 - 17.00				
	Online quotes				
Client details	available on				
Please confirm your client's details					
Client name					
	♠ PROPERTY OWNERS →				
s the client a company or an Company Individual	SHOPS →				

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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.

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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:

Welcome to				CobraQuote
HOME FIND CLIENT	RECENT CLIENTS RENEWA	LS		
			Alison.Fletcher	r@pib-insurance.com 🔒 🕇
Find Client				
Search on				
Client name	▼ sagar	SE	CLEAR	
Client name	Client reference	Client postcode		
Sagar, Test	67742146	GL1 1UB	VIEW CLIENT	NEW QUOTE
Sagar, Test	67742114	GL1 1UB	VIEW CLIENT	NEW QUOTE
Cobra Network Limited is an Ar	pointed Representative of PIB Risk Service	s Limited which is authorised and regulated by	the Financial Conduct Authority. Firm Referer	nce Number 308333. Cobra i
Network Limited's Firm Referen	ce Number is 926465.			
PIB Risk Services Limited and C Network Limited's Registered O	obra Network Limited are both registered ffice is Rossington's Business Park, West C	in England and Wales. Company Registration Nu arr Road, Retford, Nottinghamshire, DN22 7SW.	imbers 02682789 and 04628555. PIB Risk Ser Part of PIB Group. For information about wh	vices Limited's and Cobra at we do with personal data
see our privacy notice .				
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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:

Client Summary for	Test Company			CobraQuote	
HOME FIND CLIENT REC	CENT CLIENTS RENEW	VALS			
You are currently editing TEST COMPA	YY			Alison.Fletcher@pib-insurance.com 🔒 🝷	Click on 'View' or 'Continue'
Quotes				Test Company	active quotes or policies.
Professional Indemnity	Reference	Premium		Mr Test Tester	
Effective from 17/01/2023	112555644	N/A	CONTINUE X	test.tester@bh.uk.acturis.com	
				📞 Not provided	
Policies					
Property Owners On cover from 01/02/2022	Policy Number ACTUP0013529	Expiry Date 31/01/2023	VIEW	EDIT DETAILS NEW QUOTE	
No open adjustme	nts				
Renewal quotes					
Property Owners Effective from 01/02/2023	Policy Number ACTUP0013529	Premium £1.301.32	view X		

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Renewals:

						Cobro	Quote
HOME FIND CLIENT RE	CENT CLIENTS RENEWA	ILS					
					Alison.Fletch	ner@pib-insuran	ice.com 🔒 👻
Renewals Dashboa	ard						
Client Name	Product	Policy Number	Effective Date	Status	Premium		
Filter	Filter	Filter	12/01/2023 - 16/02/2023 -	All 👻		FILTER	CLEAR
Test Company	Property Owners	ACTUPO013529	01/02/2023	Obtained	£1,301.32	VIEW	CANCEL
Cobra Network Limited is an Appointed I Network Limited's Firm Reference Numb PIB Risk Services Limited and Cobra Neth	Representative of PIB Risk Servic ber is 926465. work Limited are both registered	es Limited which is authoris in England and Wales. Com	sed and regulated by the P spany Registration Numbe	Financial Conduct Au ers 02682789 and 04	thority, Firm Refer	rence Number 3	08333. Cobra s and Cobra
see our <u>privacy notice</u> .	ossington's business park, west (an Koau, Keuoru, Notungr	iamsmre, Divizz 75iv. Part	or Pile Group, Por In		what we do with	personaruata

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Use the filers 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.

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.

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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 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 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

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 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

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, 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 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, 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 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

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