

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



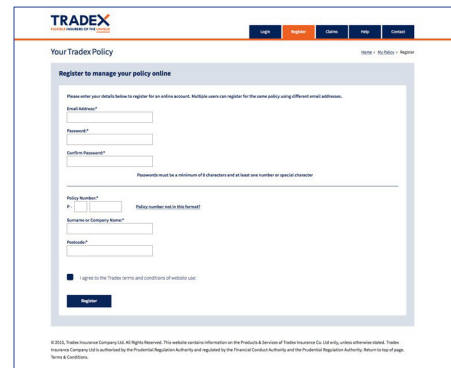
Compatible with mobile, tablet and desktop device

- ✓ 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

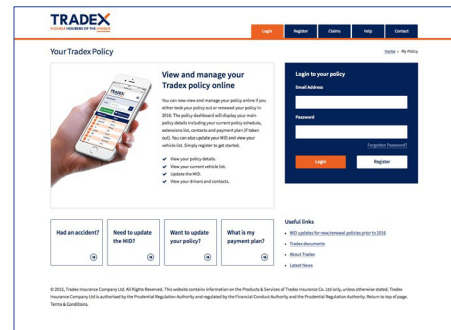
1 Register

- 1.1 Click on “Register” tab: www.customerportal.tradex.com
- 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.



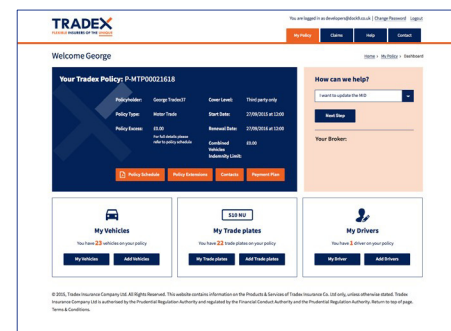
2 Login

- 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 Forgiven password? - click on “Forgotten 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”



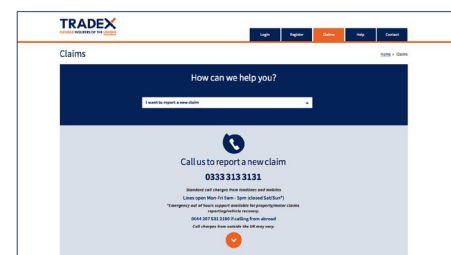
3 Dashboard

- 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

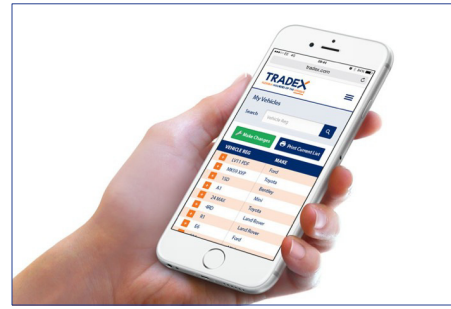


How to update your MID

1

Login

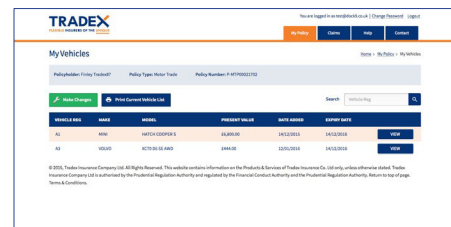
- 1.1 You can access via your mobile, tablet, laptop or PC
- 1.2 Login to the Tradex Customer Portal
If you have not already registered - please refer to “Register”
- 1.3 Click on “My Vehicles” button
then click on “Make Changes”
- 1.4 For a shortcut you can click the “Add Vehicles” button



2

Vehicle List

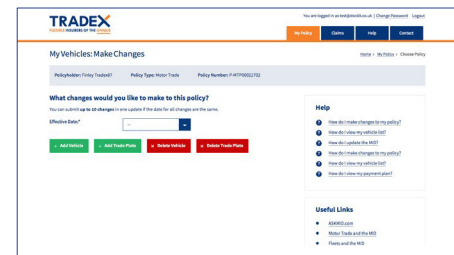
- 2.1 View your current vehicle list
- 2.2 Click “View” to view further details of the vehicle
- 2.3 Click “Print” to print your vehicle list
- 2.4 Cant see your vehicle?
Only current vehicles appear on the list
If a vehicle is in review, it will not appear until accepted Please contact your broker if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

