



# This Way System

## User Guide

2019

A solid green horizontal bar spans the width of the page at the bottom.

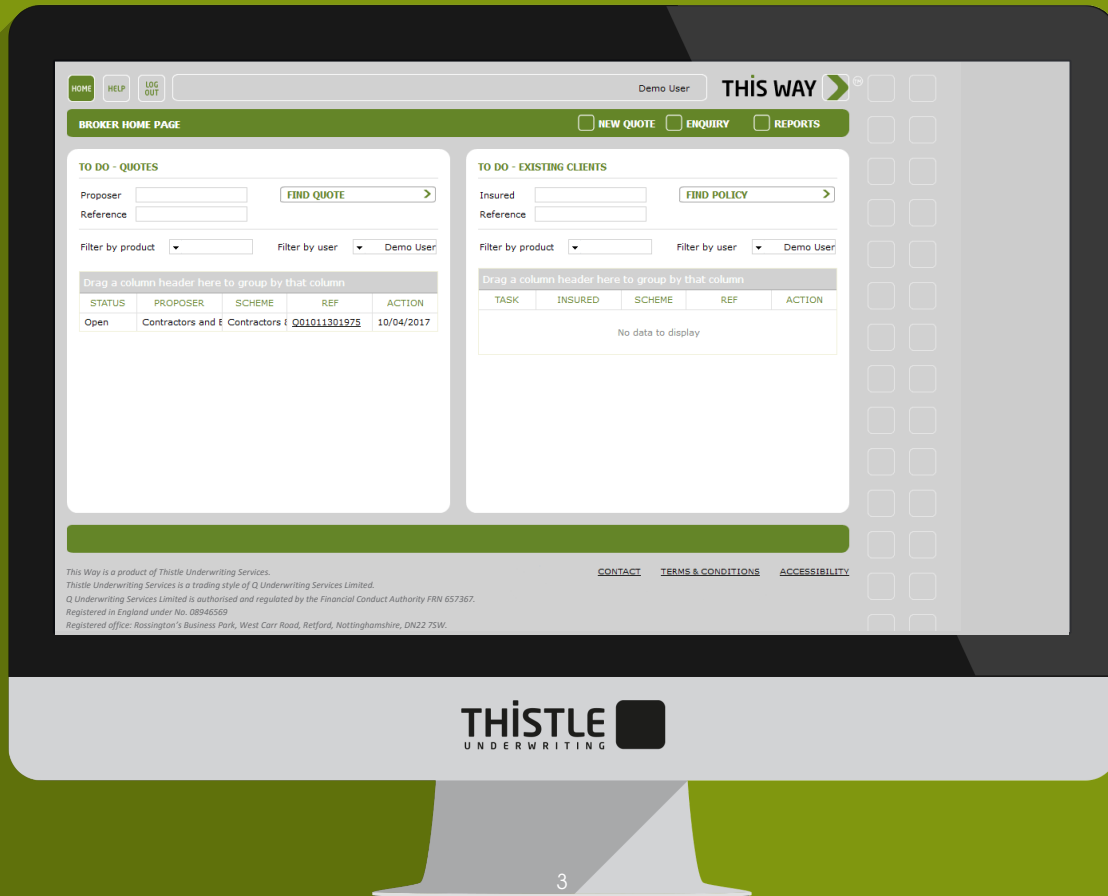
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# Introduction

This Way offers a wide range of SME business insurances all with enhanced commission rates and just a few clicks away.

This Way is a simple, easy to use trading system and is ready and waiting to help you and your business.



# New Quote

- From your personal homepage (Screen 1), click on NEW QUOTE.
- Choose your product family, then your product. Please refer to the product description for useful information including minimum premiums.

Then click on START NEW QUOTE.

## Declarations

- Read through and AGREE to the declarations where possible. Please note; some products include a 15 metre height limit as standard, refer to the Underwriters if you are unsure.
- Alternatively click on REFER which will allow you to input the details prior to submitting the risk to an underwriter for consideration.

## Details

- Progress through the quotation, inputting risk information as required.
- Should you have any queries, simply hover over the ? to view the help text.

HOME HELP LOG OUT

New Business - Contractors & Engineers

Demo User **THIS WAY**

DECLARATIONS
 DETAILS
 TRADE
 COVER
 BBID
 PAYMENT
 DOCUMENTS
 REFERRAL
 SUMMARY

**TRADE DETAILS**

**Please answer the following questions for the trade selected:**

Occupation Builder - new pdh

Other - Please Specify [REDACTED]

Estimated Trade % 100

Is there any use of Heat Away from the Insured's own premises? No

Estimated Heat Away % 0

Will heat work include the use of Welding or cutting equipment? [REDACTED]

**QUOTATION REFERENCE** Q01011301975

**Click SAVE TRADE DETAILS to proceed or to add further trades**

ADD NEW TRADE 
DELETE TRADE

SAVE TRADE DETAILS 
CANCEL TRADE EDIT

NEXT   
BACK   
SAVE & RETURN HOME

All currency amounts are in GBP (£) unless otherwise stated

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*Thistle Underwriting Services is a trading style of Q Underwriting Services Limited.*

*Q Underwriting Services Limited is authorised and regulated by the Financial Conduct Authority FRN 657367.*

*Registered in England under No. 08946569*

*Registered office: Rossington's Business Park, West Carr Road, Retford, Nottinghamshire, DN22 7SW.*

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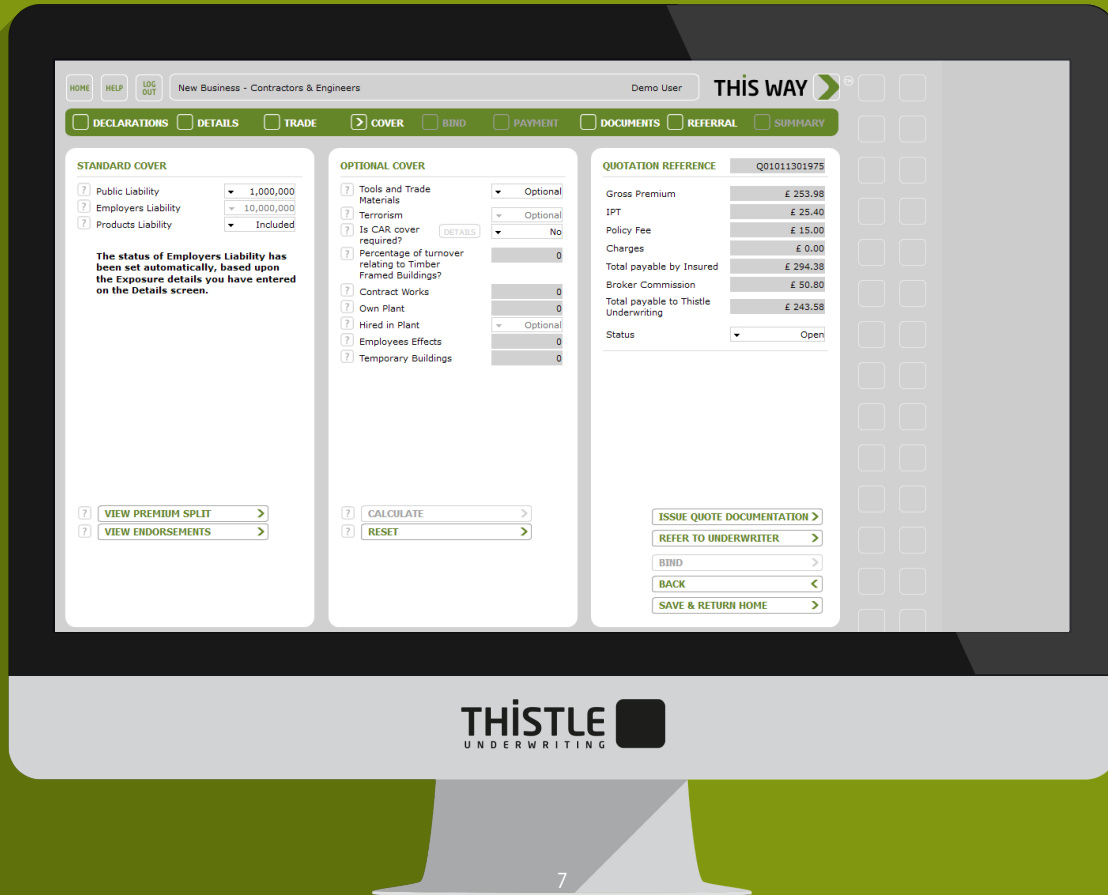
# Trade & Occupation Details

If the trade you want isn't listed in the drop down box please select 'Other ' and input the precise business description in the "Other - please Specify " field.

Enter any other information as requested, then click on SAVE TRADE DETAILS and NEXT.

Use the system to REFER TO UNDERWRITERS.

- Note - For most of our Liability products, you can select up to 6 trades with the option to refer for a bespoke business description.
- Each trade is rated individually to help you achieve the most competitive terms.





# Adjusting Limits & Adding Optional Covers

- This Way enables you to adjust the limits and levels of cover - complete your requirements and then click on CALCULATE to view the revised premium.
- Once you have selected the required limits, you are able to save for later, bind or reset to the original limits.
- Alternatively should you have a target premium or would like an underwriter to review the risk - please click REFER TO UNDERWRITER.

- If you are happy to proceed, click on ISSUE QUOTE DOCUMENTATION and you're almost finished!
- Please note you must issue quote documents prior to binding.

HOME HELP LOG OUT New Business - Contractors & Engineers Demo User THIS WAY

DECLARATIONS DETAILS TRADE COVER BIND PAYMENT DOCUMENTS REFERRAL SUMMARY

**REFERRAL / DECLINE REASONS**

Referred due to Terrorism cover selected

**REFERRAL NOTES**

READ ALL NOTES ADD NOTES

NAME	POSITION	NOTE TEXT	TIME / DATE
brokermike	Broker M	Please consider the...	14:47   10/04/17

**QUOTATION DATA**

Period of Insurance 10/04/2017 to 09/04/2018

Action Date 10/04/2017

**QUOTATION REFERENCE** Q01011301975

Gross Premium	REFER
Policy Fee	REFER
Charges	£ 0.00
Total payable by Insured	REFER
Total payable to Thistle Underwriting	REFER
Status	Referred

**ADDITIONAL ENDORSEMENTS** VIEW ENDORSEMENTS

EXCESS NEXT

ENDORSEMENTS BACK

PREMIUMS SAVE & RETURN HOME

CLAIMS SUMMARY

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**REFERRAL NOTES**

Enter your note below. Once you've finished, click on Save Note.

Please consider the following for the referral...

SAVE NOTE CANCEL

1 2

ISSUE QUOTE DOCUMENTATION

REFER TO UNDERWRITER

BIND

BACK

SAVE & RETURN HOME

# Referrals

You may choose to refer the risk, or it may be referred by the system automatically. Where this is automatic, This Way will indicate the reason(s) for the referral (Screen 4).

In either case, the system requires you to add a referral note. This will provide the underwriters with supplementary information which will assist them when assessing your risk.



# Referral Notes

Please provide full details of the occupation and processes on the REFERRAL NOTES section of this page.

Click on ADD NOTE and then SAVE NOTE for each individual message to the underwriter followed by CLOSE & RETURN TO REFERRAL.



# Documents Page

On this screen (Screen 6) you can view all documents attaching to the Policy.

This Way does not email documents to you automatically. On This Way you can select any document and save it to your computer or select documents to manually email to yourself.

Tick the box next to any document/s you wish to email to yourself, then simply click the EMAIL button.

HOME HELP LOG OUT New Business - Contractors & Engineers Demo User THIS WAY

DECLARATIONS DETAILS TRADE COVER BIND PAYMENT DOCUMENTS REFERRAL SUMMARY

### ENQUIRY

Drag a column header here to group by that column

TYPE	REFERENCE	EFFECT DATE	PREM' incl IPT	STATUS
Policy	01011301975	10/04/2017	769.98	On Cover

CLAIMS SUMMARY > TRANSACTION HISTORY > VIEW POLICY NOTES > VIEW ALL NOTES > STATUS HISTORY >

### DOCUMENTS

DOCUMENT NAME	DATE CREATED	CREATED BY	ATTACHED	EMAIL >
Documents Enclosed Letter	10/04/2017	Built-In Admin	<input type="checkbox"/>	OPEN >
EL Certificate	10/04/2017	Built-In Admin	<input type="checkbox"/>	
Health and Safety Guide	10/04/2017	Built-In Admin	<input type="checkbox"/>	
Liability Invoice	10/04/2017	Built-In Admin	<input type="checkbox"/>	
Liability Policy Wording	10/04/2017	Built-In Admin	<input type="checkbox"/>	

Page 1 of 2 (9 items) [1] 2 > VIEW EMAILS >

### POLICY REFERENCE

01011301975

Insured Contractors and Engineers T  
 Scheme Contractors & Engineers  
 Period 10/04/2017 to 09/04/2018  
 Address 1 EC3V 9LJ 68 Lombard Street

MTA >  
 CANCELLATION >  
 RENEWAL >  
 BROKER TRANSFER >

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# MTA (Mid-Term Adjustment)

## MTA on an existing policy

Firstly, locate the policy you wish to make adjustments to. The policy should have a status of

'On Cover '.

When you click on your policy, you should see the Summary screen then click on MTA (Screen 7).

- Select the date from which the MTA is required. This can be up to 45 days from the current date.
- Make the required adjustments to your quote.

- Upon completion, you can proceed to issue your quote documents (and bind your quote where necessary), or refer to an underwriter.

## Renewals

You will receive renewal terms approximately 30 days prior to expiry of cover. You can then locate your policy in This Way to:

- Renew.
- Amend details and re-quote.
- Refer the renewal quote to an underwriter.

In order to renew the policy, if a new renewal quote has not been created, locate and enter the existing record, then on the Summary page click the "RENEWAL" button. If a renewal quote has already been created and sent to you by an Underwriter, locate and enter the renewal quote, and on either the Cover or Documents page click the "RENEW" button. Then follow the on screen directions until the full set of policy documents have generated.



# Cancelling An Existing Policy

From the summary screen of the policy you wish to cancel, select the cancel button, then:

- Enter the date from which the policy needs to be canceled (Screen 8). This can be up to 45 days from the current date.
- Select the cancellation reason from the drop down menu e.g. 'Gone out of business'. Please note, if "Poor Thistle Underwriting Service" or "Other " are selected you can add additional free format text providing more detail.
- Then click on 'REFER TO UNDERWRITER' adding any notes as appropriate. Once the underwriter has 'Accepted' the cancellation:

- Confirm the cancellation – following which your policy status will change.
- Go to the Documents screen, where the cancellation documents will have been generated.

HOME HELP LOG OUT New Business - Contractors & Engineers Demo User **THIS WAY**

DECLARATIONS  DETAILS  TRADE  COVER  BIND  PAYMENT  DOCUMENTS  REFERRAL  SUMMARY

**DETAILS**

Full Legal Trading Title Contractors and Engineers T

Claims in the last 5 years?  No

Do you require cover for any subsidiary companies?  No

Business postcode FK1 4RN

Address 1 3 Maryfield Place

Address 2 Lime Road

Town Falkirk

County Stirlingshire

Action Date 10/04/2017

Required Inception Date 10/04/2017

Target Premium 0

How many years conducting this trade or business in this name? 3

Number of years relevant previous business experience

**QUOTATION REFERENCE** Q01021301976

**Liability Rating Basis:**  
Please select either Per Capita or Wages basis:

Which rating basis do you require?  Per Capita

**BROKER DETAILS** Test Broker - Wolve Office Test Broker

>

**NE** Once quote documents have been produced the case is locked to prevent any further changes being made.

**BA** The copy quote function enables you to produce an alternative quote whereby the existing details will already be completed for you to amend as required.

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# Copying An Existing Quote

To allow you to make a comparison between quotes simply click on CREATE COPY. The CREATE COPY button is located on the Details page of all quotes.

This creates an identical quote, in which you can amend limits and information without needing to input the Insured's details again.

HOME HELP LOG OUT Demo User **THIS WAY**

**ENQUIRY**  NEW QUOTE  ENQUIRY  REPORTS

**ENQUIRY**

Broker  Insured  Insured post code  Reference  Premise post code

User  Inception date from  to  Status  Office  Scheme

Migrated Reference

Drag a column header here to group by that column

	INSURED	INS. POSTCODE	REFERENCE	STATUS	BROKER	OFFICE	USER	SCHEME	INCEPTION DATE
<input type="checkbox"/>	test	BT1 SEE	<a href="#">Q01021300794</a>	On Cover	Test Broker - Wol	Office Test Broker	JMN	Contractors & Eng	01/07/2016
<input type="checkbox"/>	test	FK1 4RN	<a href="#">Q02011300822</a>	On Cover	Test Broker - Wol	Office Test Broker	brokermike	Contractors & Eng	02/07/2016
<input type="checkbox"/>	Test Client	FK1 4RN	<a href="#">Q01011300904</a>	On Cover	Test Broker - Wol	Office Test Broker	mb1	Contractors & Eng	09/06/2016
<input type="checkbox"/>	test	HG3 3QU	<a href="#">Q01011301149</a>	On Cover	Test Broker - Wol	Office Test Broker	JMN	Contractors & Eng	26/07/2016
<input type="checkbox"/>	test	HG4 2HH	<a href="#">Q01011301155</a>	On Cover	Test Broker - Wol	Office Test Broker	JMN	Contractors & Eng	20/07/2016
<input type="checkbox"/>	test	FK6 6AE	<a href="#">Q01011301422</a>	On Cover	Test Broker - Wol	Office Test Broker	brokermike	Contractors & Eng	26/08/2016
<input type="checkbox"/>	test	FK6 6AE	<a href="#">Q01011301422/1</a>	On Cover	Test Broker - Wol	Office Test Broker	brokermike	Contractors & Eng	26/08/2016

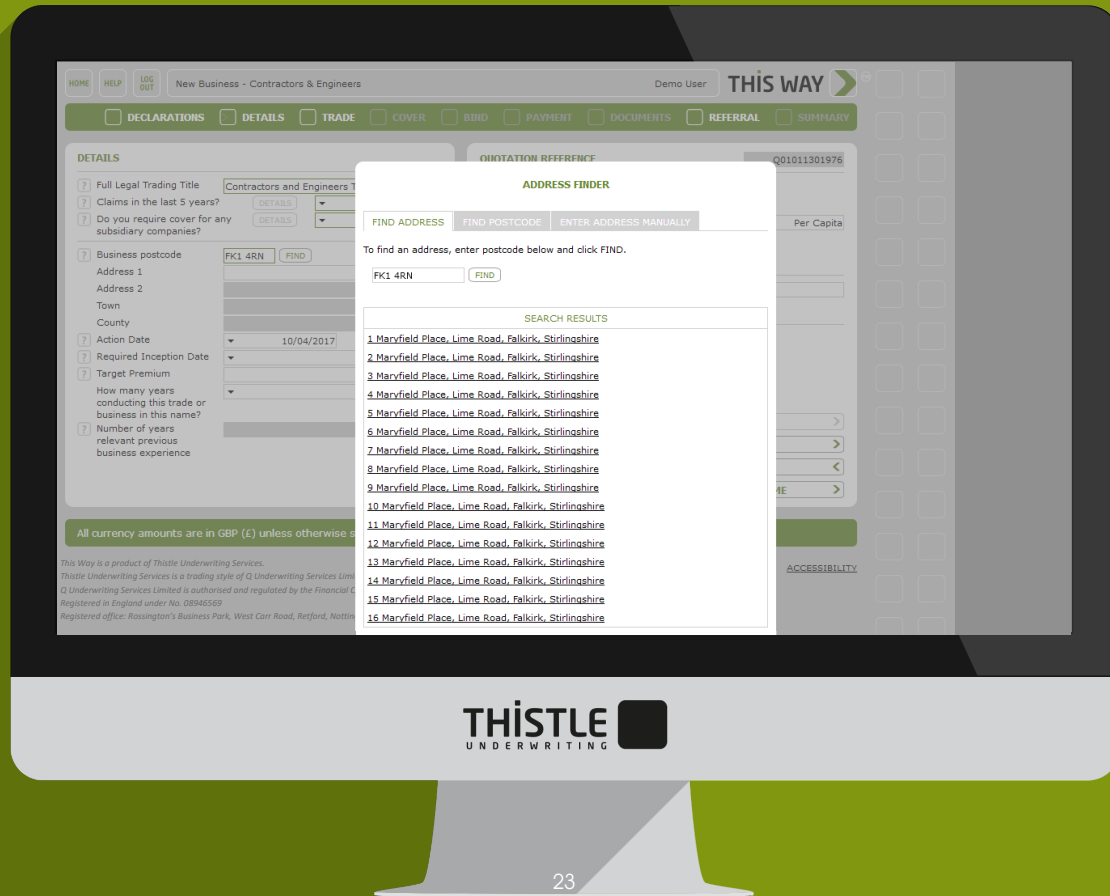
# Searching For A Quote/Policy

- Go to the homepage.
- Insert the proposer 's name or alternatively your quote reference into the relevant box. If you'd like to find all variations of a quote, or previous policies and renewal quotes please only enter the last 7 digits of your quote/policy reference.
- Click enter and your quote will then appear on the Enquiry page.
- Click on the reference number to open the quote.

## **I'm still unable to locate my quote...**

If you're experiencing problems finding your quote, you can try to search for it using the Enquiry page using different filters. Or, click on 'Show advanced search' (Screen 10) and use additional parameters such as inception date

# Screen 11 Find By Address





# What If I Am Unable To Locate A Postcode?

Firstly, click on the "Find By Address" (Screen 11) tab to search for the postcode, after which you should check with the client and confirm that the postcode is correct. Alternatively you can refer to [www.royalmail.com/find-a-postcode](http://www.royalmail.com/find-a-postcode). If you still experience problems, please enter the address manually.

# Frequently Asked Questions

## **What if I can't remember my password?**

Simply click on 'RESET PASSWORD' on the login page and This Way will email you a replacement. If you have input an incorrect password three times or more, you will be locked out of the system and will then have to contact the This Way Support team for them to unlock your account and reset your password.

## **What if I can't remember my user name?**

Your user name is usually your email address. If you continue to have problems please contact the This Way Support Team.

## **What should I do if I can't access the This Way homepage?**

Initially, please check that you can access other web pages in case there is a general Internet problem in your office. Alternatively, you will need to contact the This Way Support Team.

## **What do I do if information on my quote is incorrect e.g. the address is wrong?**

Simply use the 'COPY QUOTE' function to correct this (Screen 9). On the Cover screen, your quote must have a status of 'Quoted' (documents have been issued). If your quote has already been placed on cover, you will need to contact your usual dedicated underwriter for them to correct.

## **I've received an error message, what should I do?**

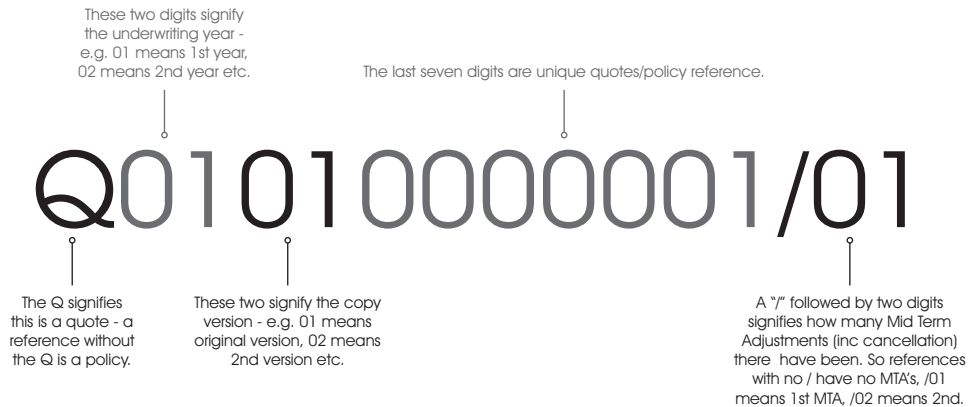
Try to carry out your transaction again and if you still receive the error message, make a note of this and contact the This Way Support Team.

## **What if no documents were generated from my quote?**

Contact your dedicated underwriter to check whether they can generate the documents for you. If you continue to experience problems, contact the This Way Support Team.

# Quotation & Policy Number Formation

Below shows the way in which the This Way system generates quotation/policy numbers. As such, you should be able to tell various things about a quote/policy, just by looking at its number.



# Need Assistance?

Should you require any help or advice, please contact us:

## **System Enquiries:**

T: 0844 692 3855      E: [twsupport@thistleunderwriting.co.uk](mailto:twsupport@thistleunderwriting.co.uk)

## **Underwriting Enquiries:**

T: 01902 714000      E: [uwenquiries@thistleunderwriting.co.uk](mailto:uwenquiries@thistleunderwriting.co.uk)

## **Agency Queries:**

T: 01777 808691      E: [agency@thistleinsurance.co.uk](mailto:agency@thistleinsurance.co.uk)

Please note calls may be recorded for training and monitoring purposes.

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