WebRater tips

FAQs

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How do you search for a risk?

When looking for terms, it's best to search by the insureds name (as entered into the system) or the control/quote number. The search results should be checked against the status, policy type and modified date columns to make sure you're getting the correct terms.

How do I go back to a page to update information, e.g., change turnover, or limit options?

You can easily navigate between pages by using the navigation bar at the top of the screen.

How do I bind multiple products for a client?

On the 'Binding' screen, you can bind multiple products simultaneously. Select which limit option you want for each product, then click 'Bind'.

What happens if I forget my password?

You can easily reset your password by clicking on the 'Forgot password' link on the login screen.

What products are available for my client's occupation?

On the WebRater homepage, click on, Available Occupations, on the navigation bar. Type in the keywords of the occupation name, for example, 'engineering' to receive a list of available occupations. Click on the relevant occupation and the system will display products available.

What happens if a risk is referred of declined?

You can easily see the reason why a risk has been referred or declined on the 'Build Quote' screen. Next to the product, it'll say that the product has been referred or declined and at the top of the screen, you can expand 'Referral Reason(s)' to get reasons for the referral or decline.

How can I add additional products to the terms?

You don't have to create a new risk and enter all the basic information again. Search for the existing risk you've set up and click into it. Go to the 'Choose Coverage' page (through the navigation bar at the top of the screen) and select the additional products you want to include.

How can I pro rata a policy?

On the 'Build Quote' screen and/or the 'Binding' screen, the policy period is set to 12 months by default. You can easily change the expiry date to any date between 6 and18 months from inception and the price will automatically update.

What happens if we get terms for a product the client no longer wants?

If you've quoted multiple products for a client and there is one that they no longer need, you can easily remove these from terms or binding by clicking 'Deselect' next to the product on the 'Build Quote' or 'Binding screen'.

What if I want to provide further information?

There's a 'Contact DUAL' button on the WebRater that you can click on to provide further commentary or attach additional information you think may be relevant.

What should I do if I've already quoted or bound the risk but need a copy of the documents?

You can easily get a copy of quote terms by going into the risk, navigating to the 'Quote' screen and selecting 'Email quote' to receive a copy of terms, or 'view/download' to download terms.

To receive a copy of the policy documents, go to the 'Policy' tab and search for the risk. Click 'Regenerate policy documents' to be sent a copy of the policy schedule.

What do the different statuses mean against a risk?

Incomplete	Only the basic information or underwriting questions have been completed
Indication	Reached build quote stage
Quoted	Reached formal quote stage (sending formal terms)
Bound	Bound policy
Cancelled	Policy has been cancelled
Referred	Product has referred
Declined	Product has referred

How do I add access for a new staff member or remove access for someone who has left?

This can easily be done by navigating to the 'User Management' section under the icon in the top right corner. Here you can quickly add a new user (without them having to complete the full sign-up process), edit someone's details or deactivate/remove a user.

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