



6ix User Guide

External Use Only

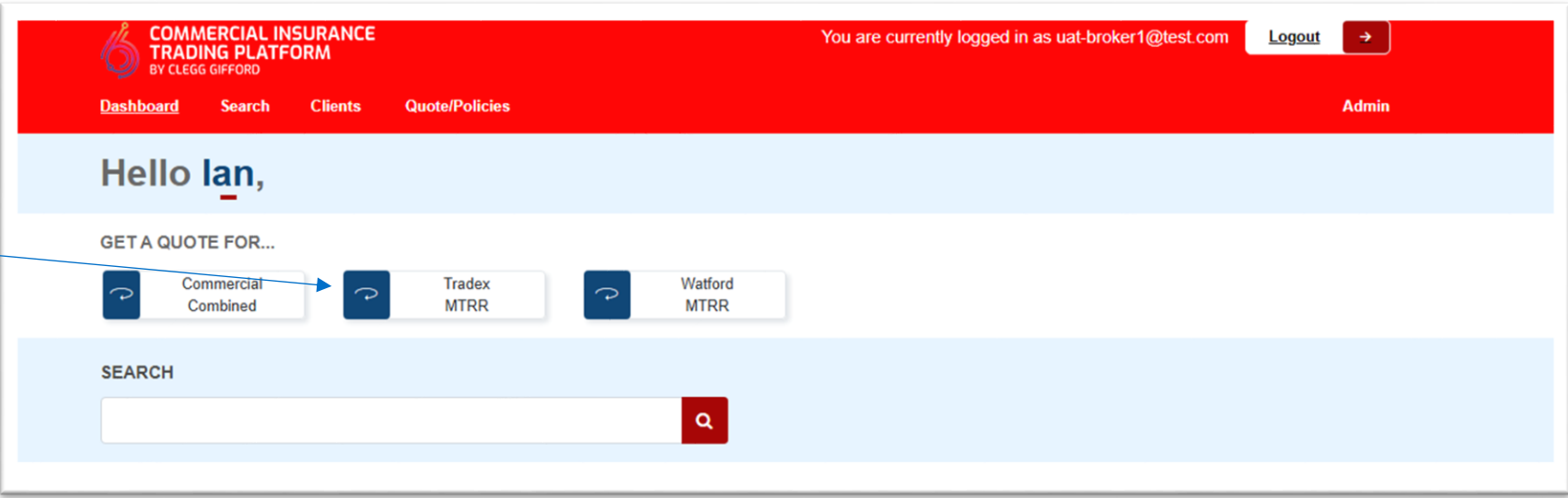


Quote

External Use Only

Step 1

Log in to 6ix
and select
Tradex MTRR.



The screenshot shows the 'COMMERCIAL INSURANCE TRADING PLATFORM' dashboard by Clegg Gifford. The user is logged in as 'uat-broker1@test.com'. The dashboard features a red header with navigation links: Dashboard, Search, Clients, Quote/Policies, and Admin. Below the header, a light blue banner greets the user with 'Hello Ian,'. A section titled 'GET A QUOTE FOR...' contains three buttons: 'Commercial Combined', 'Tradex MTRR', and 'Watford MTRR'. A blue arrow points from the text 'Log in to 6ix and select Tradex MTRR.' to the 'Tradex MTRR' button. At the bottom, there is a 'SEARCH' section with a text input field and a search icon.

Step 2

Fill in Motor Trade quote with the necessary data.

Please ensure you add the correct company/legal entity as this cannot be edited at a later stage.

You are on a **broker portal quote process** and currently logged in as **uat-broker1@test.com** [Return to Dashboard](#)

Motor Trade Full Quote

Please fill out the following details to get a full quote.

When do you want the policy to start?

 dd/mm/yyyy

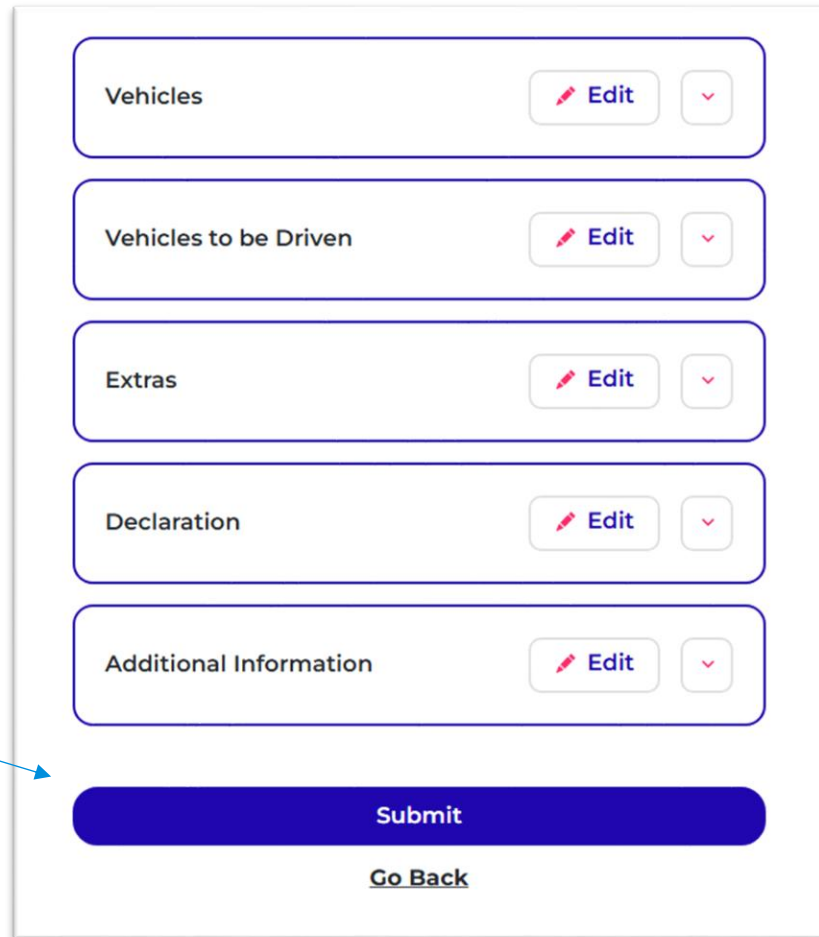
The standard policy term is 12 months. Do you wish to change this to 6 months?

What type of company/legal entity is used?



Step 3

Once all the questions within these tabs have been completed. Click 'Submit'.



Vehicles  Edit 

Vehicles to be Driven  Edit 

Extras  Edit 

Declaration  Edit 

Additional Information  Edit 

Submit

[Go Back](#)



Step 4



Submission will now be sent to the underwriters for review.

Please take note of the reference number.

Thank You for Your Recent Submission

The risk is now with our team for final review and completion of relevant underwriting checks.

If you should require an immediate response, please call the team on

0333 313 3030

Or alternatively email

sales@cginsurance.com

Reference: Q/TX001991

[Return to Broker Dashboard](#)

Step 5



Once your quote is ready and has been agreed, you will receive this email which will include the quote details within the SOF, IPID, policy wording and TOBA.

We have reviewed your quote and it is now ready to purchase

Your Tradex MTRR Insurance quote details are below:

Cover Start Date:	13/05/2025 at 12:00
Premium (excl. IPT):	£3,182.36
IPT:	£381.88
Fee:	£150.00
Total Charge:	£3,714.24

[Purchase Policy](#)

Step 6

To review the details on the system, please click the 'History' tab.

Then click on the relevant New Business line.

Previous Claims
Declarations
MID Update
MID History
Vehicles/Trade Plates
Tasks & Tools
Make Adjustment
Documents
Messages
Payments
History >
Options

Incept Policy

Quote/Policy Activity Log

DESCRIPTION	TYPE	QUOTE/POLICY VERSION
Q/TX000350-002 has been paid	Paid	2

Quote/Policy Version

VERSION	TYPE	EFFECTIVE DATE	STATUS	CR
3	MTA		Quoted	ua
2	New Business	25/02/2025 17:00	Active	ia
1	New Business		Archived	ia



Accept Quote

External Use Only

Step 1

To accept the policy, click 'Incept policy'.

Quote Details	
Details	>
Endorsements	
Excess	
Previous Claims	
Declarations	
MID Update	
MID History	
Vehicles/Trade Plates	
Tasks & Tools	

Email:	27f3d845-4a58-4d1f-9ad6-1a20b2c33263@mtrremai
Quote Number:	Q/TX001991-002
Type:	Tradex MTRR
Start Date:	13/05/2025 at 12:00
Commission:	£318.24 (10.00%)

Incept Policy

Motortrade Road Risks

Cover Level	Third P
Policy Start Date	13/05/2
Term	12 mon

Step 2

Then tick to confirm you agree that the premium will be added to your statement of account.

Then click 'Incept Policy'

Payment Details

Premium (Excl Taxes):	£3,182.36
Total to be paid: *	£3,714.24 (includes IPT of £381.88 and Fee of £150)

☐ I agree that £3,714.24 will be added to my Statement of Account

Incept Policy

Step 3

Full documentation will produce, and these should be sent to your client.

NAME	
 Schedule	
 Statement of Fact	
 CG MIPD Step-by-Step Guide	
 Vehicle Schedule	
 Certificate	
 IPID	
 Policy Wording	
 No claims bonus scale	
 Clegg Gifford Client TOBA	

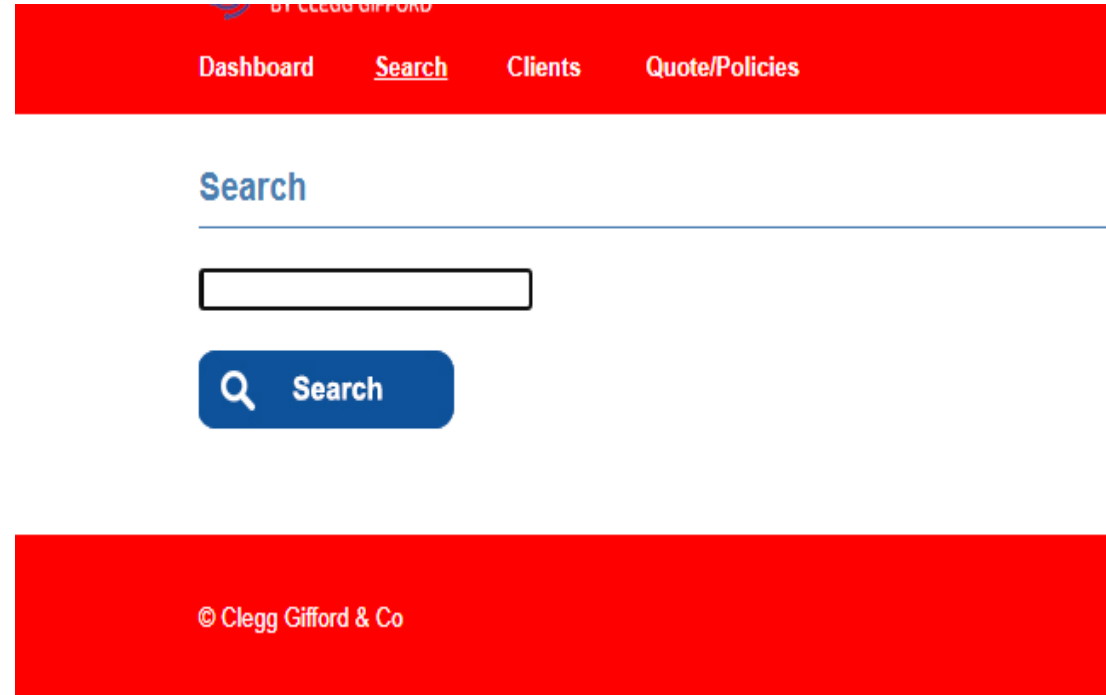


Adjustment

External Use Only

Step 1

Search policy number, quote number or policyholder's name and click on the quote or policy.



The screenshot shows the top navigation bar of the Clegg Gifford & Co. website, which is red with white text for the links: Dashboard, Search, Clients, and Quote/Policies. Below the navigation bar, the word "Search" is displayed in blue. Underneath, there is a white search input field with a black border. Below the input field is a blue button with a white magnifying glass icon and the word "Search" in white. At the bottom of the page, there is a red footer bar with the text "© Clegg Gifford & Co" in white.

Step 2

Go to the 'Make Adjustment' tab

Policy Details

Details >

Endorsements

Excess

Previous Claims

Declarations

MID Update

MID History

Vehicles/Trade Plates

Tasks & Tools

Make Adjustment

Documents

Messages

Email: 9366245d-548c-4bb9-696690f79b6b@mtrre

Policy Number: TX108150000020

Type: Tradex MTRR

Renewal Setting: CHANGE HERE ([Cha](#)

Renewal Date: 13/11/2025 at 12:00

Motortrade Road Risks

Cover Level

Policy Start Date

Term

First Name

Surname

Proposer Email

Company Name

Company Type

Step 3

Click 'Make Adjustment'

Assessments >	Type:	Tradex MTRR
5	Renewal Setting:	CHANGE HERE (Change)
us Claims	Renewal Date:	13/11/2025 at 12:00
ations	Make Adjustment	
update	Motortrade Road Risks	
istory	Cover Level	Comprehensive
es/Trade Plates	Policy Start Date	13/03/2025
& Tools	Term	12 months
	First Name	Emma

Step 4

Enter the adjustment date and then amend the necessary information.

Motor Trade Full Quote

Please fill out the following details to get a full quote.

When do you want the adjustment to start?

⚠ Policy start date must not be in the past.

The standard policy term is 12 months. Do you wish to change this to 6 months?

Yes

No

What type of company/legal entity is used?

Private Limited Company

Proposer Details

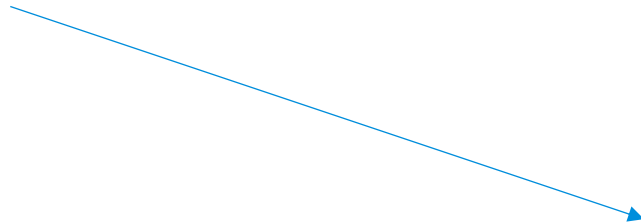
Company Name:

ET Motors

Trading Name (if applicable):

Step 5

Click 'Submit'



Extras

Edit

▼

Declaration

Edit

▼

Additional Information

Edit

▼

Submit

Go Back



Step 6



Submission will now be sent to the underwriters for review.

Thank You for Your Recent Submission

The risk is now with our team for final review and completion of relevant underwriting checks.

If you should require an immediate response, please call the team on

0333 313 3030

Or alternatively email

sales@cginsurance.com

Reference: Q/TX001991

[Return to Broker Dashboard](#)

Step 7

Once reviewed by the underwriter, you will then receive an email.

To review the details on the system, please click 'history' tab

Then click on the relevant MTA.

If the client wishes to go ahead with this change. Please see 'Accept Quote' instructions on page 9 to 12 of this guide.

Previous Claims

- Declarations
- MID Update
- MID History
- Vehicles/Trade Plates

Tasks & Tools

- Make Adjustment
- Documents
- Messages
- Payments
- History** >
- Options

Incept Policy

Quote/Policy Activity Log

DESCRIPTION	TYPE	QUOTE/POLICY VERSION
Q/TX000350-002 has been paid	Paid	2

Quote/Policy Version

VERSION	TYPE	EFFECTIVE DATE	STATUS	CR
3	MTA		Quoted	ual
2	New Business	25/02/2025 17:00	Active	ian
1	New Business		Archived	ian

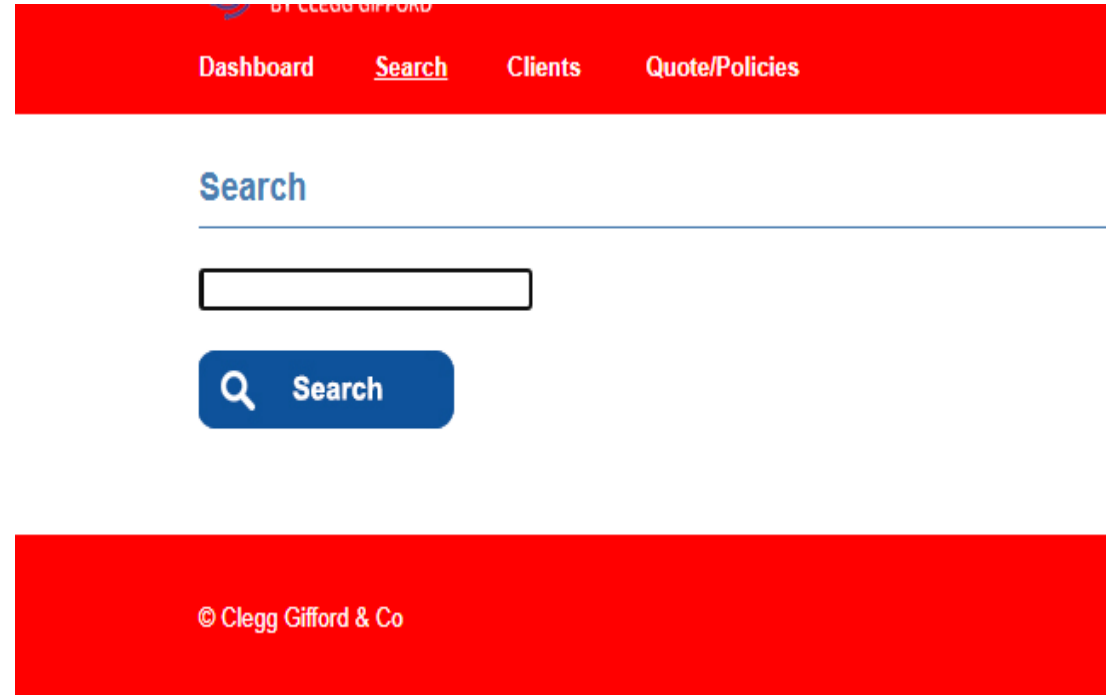


MID UPDATE

External Use Only

Step 1

Search policy number, quote number or policyholder's name and click on the quote or policy.



The screenshot shows the top navigation bar of the Clegg Gifford & Co. website, which is red with white text for the links: Dashboard, Search, Clients, and Quote/Policies. Below the navigation bar, the word "Search" is displayed in blue. Underneath, there is a white search input field with a black border. Below the input field is a blue button with a white magnifying glass icon and the word "Search" in white text. At the bottom of the page, there is a red footer bar with the text "© Clegg Gifford & Co" in white.

Step 2

Select 'MID update' tab and
select make changes

Policy TX108150000020

Policyholder:	
Policy Start Date:	13/03/2025 at 10:43
Policy End Date:	13/11/2025 at 12:00

Vehicles



Make Changes

[Go Back](#)

Step 3

Select the change required.

Click 'Next'.

Then either add or remove the relevant vehicle.

Your changes

Please select

Please Select



Next

[Go Back](#)

Step 4

Select yes/no to 'Do you want to make more changes?'

Please note that a maximum of 4 changes can be processed at any one time.

Your changes

Remove Vehicle
(12/03/2025 at 09:59)
 (VAUXHALL CORSA LIFE
A/C)



Do you want to make more changes?

Please select



[Go Back](#)

Step 5



If 'no' selected a next button will appear. Please click this.

If 'yes' selected, please then select what change is required.

Once complete please click 'Next'.

Do you want to make more changes?

Yes



Please select

Please Select



Next

[Go Back](#)

Step 6

Should the system note the following error message, please contact us direct.

Add Vehicle

To add your policy a vehicle, please enter details below.

Vehicle Registration



Find Vehicle



This vehicle cannot be added using the Clegg Gifford MID Portal. Please contact your broker so this update can be completed.

Go Back

Step 6

To check historic MID lists,
select MID history tab.

To check current MID list,
select Vehicles/Trade plates
tab.

Dashboard / Test Case1001 (CN/TC/000288) / WI/W/000013

Quote Details

- Details
- Premium Calculation
- Endorsements
- Excess
- Previous Claims
- Declarations
- MID Update
- MID History
- Vehicles/Trade plates**

Tasks & Tools

- Make Adjustment
- Workflow
- Billing
- Options
- History
- Claims
- Notes

Broker "Dock9", created by broker@dock9.co.uk (07123456789) - Commission: £1,409.59 (10%)

Email:	d963e675-3600-40ac-b17f-97c8bbe97707@mtremainotmapped.coverx.co.uk	Address:	View Address
Mobile:	[REDACTED]	Telephone:	[REDACTED]
Policy Number:	WI/W/000013	Open GI Reference:	TEST01RR02 (Change)
Status:	Archived	Type:	Watford MTRR
Version:	Current	Renewal Date:	05/03/2026 at 12:00
Start Date:	05/03/2025 at 12:25		

Vehicles

REGISTRATION NUMBER [MANUAL ENTRY](#)

[REDACTED]

Specified Vehicles

REGISTRATION NUMBER [MANUAL ENTRY](#)

No records to display.

Trade Plates

TRADE PLATE NUMBER [MANUAL ENTRY](#)

No records to display.



Cancellation

External Use Only



Step 1

The cancellation process is not available to brokers currently. Please email underwriting@tradex.com to process the cancellation. Please ensure the following information is noted within the email:

- Policyholder's name
- Policy Number
- Date and Time of cancellation
- Reason for cancellation (if a cancellation letter has been issued by yourselves, please ensure a copy of this letter is attached to the email).



History

External Use Only

Step 1

To review the previous history please select the 'History' tab

Tasks & Tools

Make Adjustment

Documents

Messages

Payments

History >

Options

Q/TX000196-003 has been paid

Q/TX000196-002 has been paid

Quote/Policy Version

VERSION	TYPE	EF
9	MTA	
8	MTA	1:
7	MTA	1:
6	MTA	1'

Step 2

To review the previous covers or documents please click on the relevant transaction line.

Quote/Policy Version

VERSION	TYPE	EFFECTIVE DATE	STATUS
9	MTA		Quoted
8	MTA	13/03/2025 10:43	Active
7	MTA	18/02/2025 18:30	Archived
6	MTA	17/02/2025 18:30	Archived
5	MTA		Referral - Declined
4	MTA		Referral - Declined
3	MTA	14/02/2025 18:30	Archived
2	New Business	13/11/2024 15:30	Archived
1	New Business		Archived

Step 3

Once you have clicked on the transaction line you will then be able to review the different transaction lines. See details tab or the documentation tab for policy details.

Quote Details
Details
Endorsements
Excess
Previous Claims
Declarations
MID Update
MID History
Vehicles/Trade Plates
Tasks & Tools
Make Adjustment
Documents
Messages
Payments
History >
Options