

# Optima Online user guide

## What is Optima Online?

Optima Online is Groupama's online trading facility which allows you to obtain instant quotes, hold cover, process mid-term adjustments, renewals and produce point of sale documentation for a range of commercial products.

## Which Groupama products are available?

- Optima Trade Plus
- Optima Trade & Professional
- Optima Shop
- Optima Office & Surgery
- Optima Property
  - Blocks of flats
  - Commercial
  - Residential let
- Optima Small Fleet

Full product information including cover limits, target markets, commission levels and minimum premiums can be found in our Guide to Groupama. Log onto [www.groupama.co.uk/intermediaries](http://www.groupama.co.uk/intermediaries) to download a copy.

## How to access Optima Online

Launch your web browser and enter the address:

[www.groupama.co.uk/intermediaries](http://www.groupama.co.uk/intermediaries)

Alternatively follow the link 'Optima Online' under 'Services' from our intermediary website:  
[www.groupama.co.uk/intermediaries](http://www.groupama.co.uk/intermediaries)

Enter your username and password

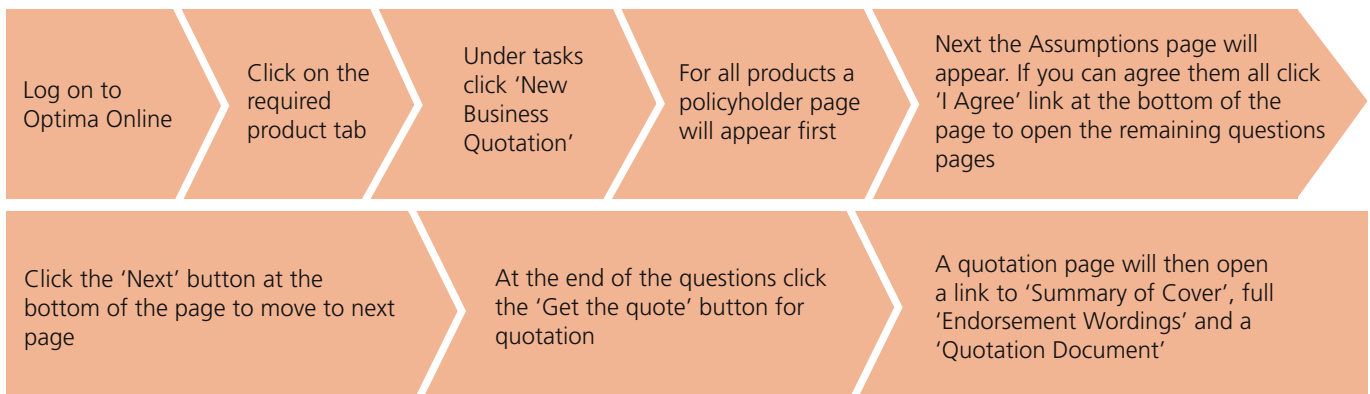
## What if you need a username or have forgotten your username or password?

If you have forgotten your username/password or need a new one simply contact our Broker Trading Team on 0161 830 1345 or email them on: [brokertradingteam@groupama.co.uk](mailto:brokertradingteam@groupama.co.uk).

## The Broker Trading Team

Can provide telephone answers about placing business via Optima Online and guide you through the process, whatever stage of the transaction you're at. They will also give technical advice on how to use Optima Online and the best way of placing business with us for the risks that fall outside our online underwriting criteria.

## How to get a quote



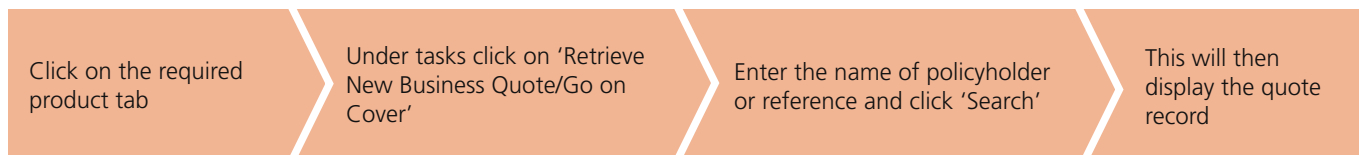
**TIP** There is the option to save partially completed quotes at any time in the process by clicking 'Save'.

**TIP** Click the new  (information) buttons if you need further clarification on an area/task.



**Broker Trading Team: Front row** Paul Angus and Steven Holland. **Back row** Vicky Mills and Anita Fenna.

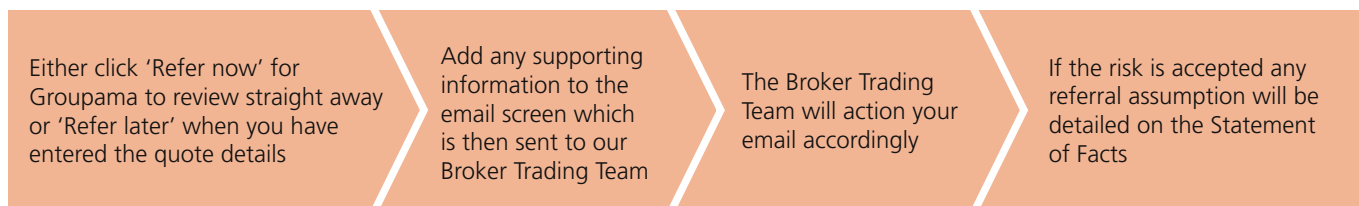
## How to access saved quotes



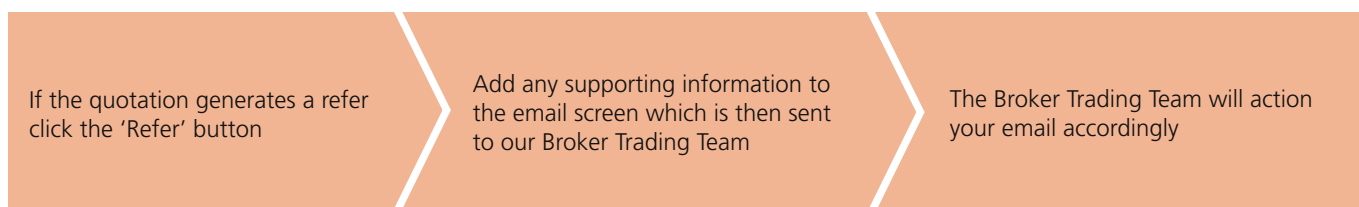
- Alternatively if you just click the 'Search' button in this zone you can view a list of all draft quotes created by your agency.
- If you wish to narrow your search you can simply select to search by policyholder, postcodes or reference.
- To access a required record simply click on the 'Amend' or 'Go on cover' links in the list of quotes.

## How to refer for special consideration

### Referral relates to an Assumption

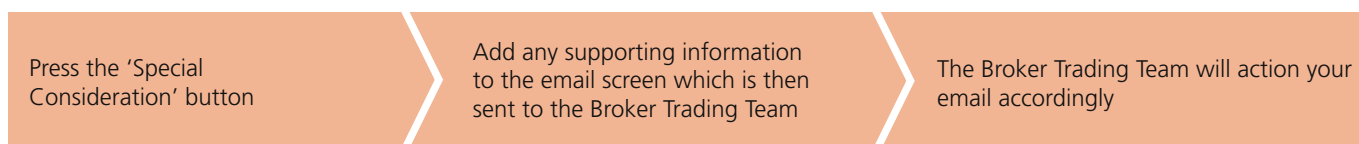


### System referral at quotation stage

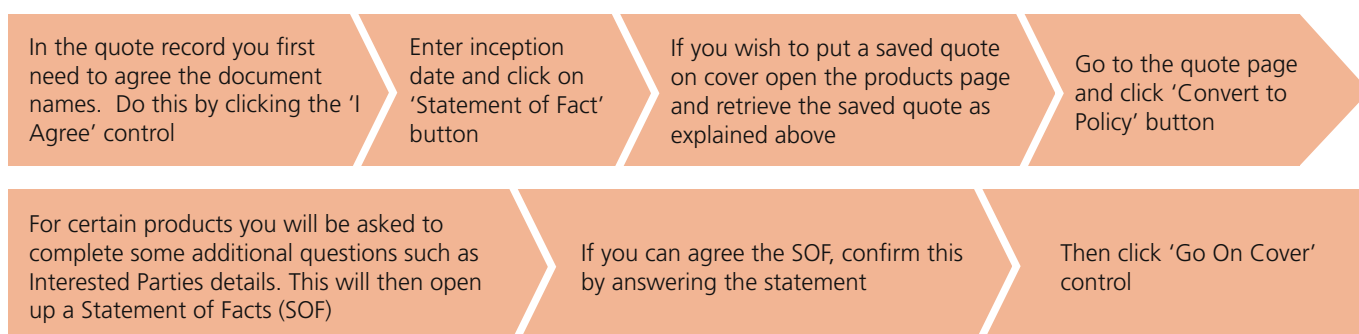


### Optional broker referral at quotation stage

At the end of the quotation process you can refer the quotation to our Broker Trading Team if you feel the proposal merits special consideration.



## How to put a quote on cover



- A confirmation of cover page will then open with the policy number.
- All documentation including certificates are stored as pdf's for you to download and print.
- If you prefer a hard copy of the policy booklet please select this option and it will be posted to you.

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