

# E-BUSINESSQUICKGUIDES Quote Referral Functionality

Quote Referral provides you with the ability to refer quotes to QBE when created via Sunrise or c.change directly.

#### Complete quote details

Start your quote following your existing process, completing all the required risk information. When you proceed to the History tab you will notice there are extra details required for completion.

If you answer **Yes** for any the below questions, you will need to click on **Details**. This will take you through to Add History Details where you will need to enter the applicable details. Click **Close and go back** to exit this screen.

Policy & customer details		Back to Customer Histor	ry			
ustomer Policy History Premium		Add History De	etails	Existing History	Cost Art	ctions
Customer History		Made any clair	n(s) on an insurer for loss or damage ?	03/2020 Breakage of Glass Accidental breakage of glass	\$5,000	ū
Have you in the last 3 years: Made any claim(s) on an insurer for loss or damage ?	Select Yes No Details ©	Date of Incident				
Had any insurance declined or cancelled, proposal/application rejected, renewal refused, claim rejected, special conditions or excess imposed by an insurer ?	Select V Details	Cost	\$ 0			
Suffered any loss or damage which would have been covered by the proposed insurance policy ?	Select 🔹 Details 🖉	Further Details				
lave you or your partner(s) or director(s) of the business:						
ver been declared bankrupt ?	Select 🔹 Details 🛇					
ver been involved in a company or business which became insolvent or subject to any form of insolvency administration (e.g. quidation or receivership) ?	Select 🔹 Details 🛇					
Been convicted of any criminal offence within the past 5 years (other than minor traffic convictions) ?	Select 🔹 Details 🛇					
Seen liable for any civil offence or pecuniary penalty (exceeding \$5,000) ?	Select 🔹 Details 🥝					
			Add			
			Close	se and go back		

#### **Refer Quote**

 $Once you have reached the \mbox{Policy Premium Breakdown} screen you now have the option to refer the quote to QBE. To do this:$ 

- Click Complete and
- Select Refer
- Enter any additional details if required
- Select the email address you would normally select for other transactions and click Refer

Note 1: If you do not wish to refer the quote click Complete Transaction.

Note 2: If you select Complete and don't refer the transaction, to convert the quote to New Business you will need to amend / edit the quote.

Policy Premium Breakdown	n							Referral Information
								No cover is in place until we confirm acceptance.
	FAP	Premium	Levies	S/Duty	GST	Total	🗹 Comm	
2 PARK RD MARRICKVILLE NSW 2204								Referral Reasons
Liability	\$6,375,38	\$6.375.38	\$0.00	\$0.00	\$637.54	\$7.012.92	\$1,434,46	Refer due to new/changeu variable clause
								Please provide any other relevant information for QBE Australia to consider when processing this referral.
Intermediary Fee (incl.GST)						\$0.00 *		More details for the underwriter here
Grand Total	\$6 375 39	\$6 375 38	\$0.00	\$0.00	\$637.54	\$7.012.02	\$1.424.46	
Grand Total	30,070,000	30,373.30	\$0.00	30.00	3037.54	\$7,012.92	\$1/10-1-10	
Jnderwriting Information				Premium Sur	mmary			
No cover is in place until we confirm accept	ptance.			Annual Pr	remium		\$7,012.92	
You have been provided with an Indicative	e Quote Only.			Commissi	lon		\$1,434.46	
To confirm authorised quote please refer to	o QBE Australia			GST on Co	ommission		\$143.45	
Referral Reasons				Net Prem	aium		\$5,435.01	
Refer due to new/changed Variable clause								
Information						C		
Please ensure you review clause wordings	as they are part of the t	erms and condition	.15.				Refer	Refer to: (You may select multiple addresses)
							Complete	Claudia.parker@qbe.com
Back Abandon						l	Complete *	Clear window Refer



#### Resume referral following underwriter acceptance

The quote will go through the existing QBE referral review process.

- Once the underwriter has reviewed the quote, you will receive an email letting you know this is ready to action.
- If the referral has been accepted, you must return to the QBE product screens to complete the quote and produce the quote documentation.
- Once you get to the Policy & customer details screen, you can either select:
  - Complete Transaction to complete the quote
    - Refer to Underwriter to refer to a QBE underwriter if you need further clarifications regarding the decision

Customer Po	olicy History	Premium Pa	ayment						
Policy Pro	emium Brea	kdown							
						_			_
			FAP	Premium	Levies	S/Duty	GST	Total	<b>∠</b> Comm
Liability	MARRICKVILLE N	SW 2204	\$6,375,38	\$6.375.38	\$0.00	\$0.00	\$637.54	\$7.012.92	\$1.434.46
				40,010100				***	
Intermediary	Fee (incl.GST)							\$0.00	
Grand Total		\$(	6,375.38	\$6,375.38	\$0.00	\$0.00	\$637.54	\$7,012.92	\$1,434.46
Underwriting	nformation					Premium Sur	nmary		
Information						Annual Pr	remium		\$7,012.92
Please ensure	you review clause	wordings as they are	e part of the te	rms and condition	1S.	GST on Co	mmission	Refer to Under	\$1.434.46 writer 43.45
						Net Prem	ium	Complete Trans	saction 35.01
$\frown$									
Back Ab	andon Options	Dofor to "	Amond	Quete f	ollowir	a quoto	doclino	Complete	• Next
s been dee t to conve	options clined — l ertaquot	Refer to "/ e which h	Amend las not	Quote fo been coi	ollowir mplete	ng quote d d in QBE	declined 's syste	Complete J" m, you wil	• Next
s been dee to conve Error An error has	options- clined – l ertaquot s occurred:	Refer to "/ e which h	Amend as not	Quote fo been coi	ollowir mplete	ng quote o d in QBE	declined 's syste	Complete d" m, you wil	• Next
s been ded t to conve Error An error has There has b	options- clined — l ertaquot s occurred:	Refer to "/ e which h processing yo	Amend as not	Quote fo been coi	ollowir mplete	ng quote d d in QBE	declineo 's sγste	Complete g" m, you wil	Next
been dee to conve Error An error has There has b Before you	options- clined – l ert a quot s occurred: been an error can convert t	Refer to ", e which h processing yo his quote, you	Amend as not our request must first	Quote fo been cor t. edit/amend ti	ollowir mplete he quote t	ng quote e d in QBE o complete th	decline¢ 's sγste e referral	Complete g" m, γοu wil	Next
back Abb been der to conve Error An error has There has b Before you Timestamp Broking Sys Intermediar TE Reference Session Id	andon Options- clined – l ert a quot s occurred: been an error can convert t stem Id : y Code : ce Number :	Refer to "/ e which h processing yo his quote, you 29/01/2021 at 1 TSTAPHASIS TSTABEMM DECUAT-2167 EfOlW9aHjgRM	Amend as not our request must first 11:30:40	Quote fo been con a. edit/amend th	ollowir mplete	ng quote d d in QBE	declined 's syste e referral	Complete g" m, γοu wil	Next
Back Abb been der to conve Error An error has There has b Before you Timestamp Broking Sys Intermediar TE Reference Session Id Click Exit to	andon Options- clined – l ert a quot a occurred: been an error can convert t stem Id : y Code : ce Number : return to the E	Refer to "/ e which h processing yo his quote, you 29/01/2021 at 1 STMPHASIS TSTQBEMM QBEUAT-2167 EfOIW9aHjgRN roking System	Amend las not our request must first 11:30:40	Quote fo been con a. edit/amend th	ollowir mplete	ng quote o d in QBE	declined 's syste	Complete g" m, γou wil	Il see the

Declined quote referral

If a quote was declined by a QBE Underwriter you can:

Resume/Edit/Amend the quote and resubmit, this will create a new QBE quote number

Or

If the transaction is not required, you can choose to Delete the transaction from your resume list

Note: If you delete the quote transaction from your resume list, the quote is completed deleted and no further actions are possible.



### Convert quote

At quote conversion stage all rating and underwriting related questions are locked down and you will only be able to update limited items (refer to Convert Quote – Editing for a list) The below prompt will appear to confirm all risk details are correct and no changes are required

## If no changes are required:

Click No and continue through the conversion process

# If changes are required:

- Click Yes
- This will take you back to your broker platform. Where you will need to amend / edit the quote to update the details accordingly.

Note: If you chose Amend / Edit, the system will create a new quote number for reference.

()	
Are all your risk details correct?	
If any changes are required you will need to edit the quotation first and then resubmit.	
Yes	No



### Convert Quote - Editing

At quote conversion stage all rating and underwriting related questions are locked down and you will only be able to

- Update the Customer contact details
- Add Instalment details per existing process
- Add, edit or remove specified items for General Property, Electronic Equipment and Machinery Specified.

Note: The overall sum insured and the sum insured per category, for the specified items, must remain the same. The system will not allow you to increase the overall sum insured or add a category not previously noted.

eneral Property/ Machinery B/Down	Premium				
ituation			Machinery Breakdown		
2-26 PARK ST			Machinery Breakdown Excess	\$ 250	
STUNET NSW 2000			Blanket Cover Sum Insured	\$ 0	(Per Item)
			Number of Items		
Business	PLUMBER		Deterioration of Stock	\$ 0	
eneral Property			Machinery Specified Items		
General Property Excess	\$ 250	•	Refrigerators (EX cool room)	\$10,000	,
General Property Items			REFERIDGE		
Laptop, Notepad & Tablet Computer	\$10,000	,	ICE CUBES	\$10,000	
Photographic & Video Equipment in			Total	\$20,000	
Binoculars & Telescopes	\$10,000	,	Add another item		
Total	\$20,000		Attachments		

	Sum Insured	Ð	cess
Electronic Equipment	\$ 20000	2	• 50
Data Media	\$ 0		
ncreased Cost of Working	\$ 0		
Excess (Days)	0		
indemnity Period (Months)	0		
Electronic Equipment Items	Word Processors		
DESK TOP COMPUTERS		\$10,000	*
Office Equipment OFFICE EQUIPMENT		\$10,000	ŕ
Total		\$20,000	•
Add another item			



### Inflight quotes

To convert an inflight quote to new business you must first amend / edit the quote and complete all the additional questions risk and customer history questions. If you attempt to convert an existing quote without first completing all questions the syst em will give you an error and prevent you from converting the quote (see below).

NOTE: It is IMPORTANT that you review the responses to ALL questions and ensure that the responses for any disclosure questions are correct.

isiness -	Q225075BPK		Inception Date: 27/01/2021 Effective Date: 27/01/2021 Expiry
E	rror		
A	n error has occurred:		
Т	here has been an erro	or processing your request.	
B	efore you can conver	t this quote, you must first edit/a	mend the quote and complete the additional questions
T B Ir T S	imestamp roking System Id itermediary Code E Reference Number ession Id	: 29/01/2021 at 09:23:07 : WINTEST : TSTQBEMM : QBEUAT-2155 : wD64TsZrC64NfpSdIKXnIN3	
C	lick Exit to return to the	Broking System	
			Fxit