

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

TRADE > Quote - Referral - Q212348BPX Inception: 14/12/2020 • Effective: 14/12/2020 • Expiry: 14/12/2021

Policy & customer details

Customer Policy History **Premium** Payment

Policy Premium Breakdown

	FAP	Premium	Levies	S/Duty	GST	Total	Comm
2 PARK RD MARRICKVILLE NSW 2204							
Liability	\$6,375.38	\$6,375.38	\$0.00	\$0.00	\$637.54	\$7,012.92	\$1,434.46
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 Information

Information

Please ensure you review clause wordings as they are part of the terms and conditions.

Premium Summary

Annual Premium	\$7,012.92
Commission	\$1,434.46
GST on Commission	43.45
Net Premium	35.01

Back Abandon Options

Complete Next

Note 1: If a quote has been declined – Refer to “Amend Quote following quote declined”

Note 2: If you attempt to convert a quote which has not been completed in QBE's system, you will see the following error

Error

An error has occurred:

There has been an error processing your request.

Before you can convert this quote, you must first edit/amend the quote to complete the referral

Timestamp : 29/01/2021 at 11:30:40
 Broking System Id : TSTMPHISIS
 Intermediary Code : TSTQBEMM
 TE Reference Number : QBEUAT-2167
 Session Id : iEFOIW9aHjgRN6iURUINPnc

Click Exit to return to the Broking System

Exit

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

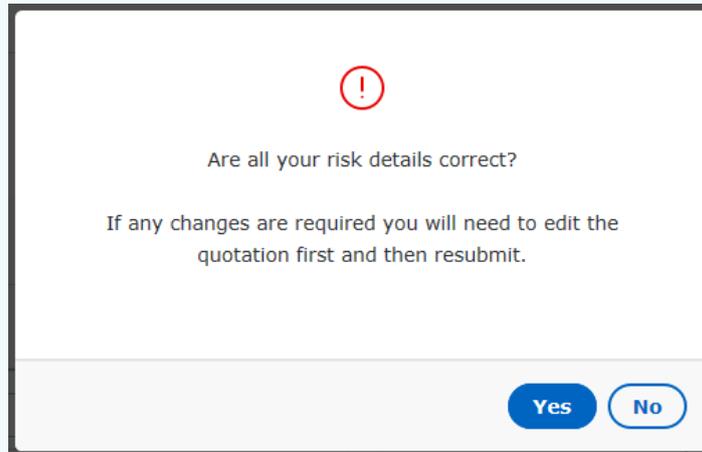
If no changes are required:

- 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.



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.

General Property / Machinery B/Down Premium

Situation
2-26 PARK ST
SYDNEY NSW 2000

Risk Details
Business: **PLUMBER**

General Property
General Property Excess: \$ 250

General Property Items		
Laptop, Notepad & Tablet Computers LAPTOPS	\$10,000	✎
Photographic & Video Equipment inc. Binoculars & Telescopes CAMERAS	\$10,000	✎
Total	\$20,000	

Machinery Breakdown

Machinery Breakdown Excess: \$ 250

Blanket Cover Sum Insured: \$ 0 (Per Item)

Number of Items: 0

Deterioration of Stock: \$ 0

Machinery Specified Items

Refrigerators (EX cool room) REFERIDGE	\$10,000	✎
Ice making machine ICE CUBES	\$10,000	✎
Total	\$20,000	

[Add another item](#)

Attachments

Electronic Equipment

	Sum Insured	Excess
Electronic Equipment	\$ 20000	250
Data Media	\$ 0	
Increased Cost of Working	\$ 0	
Excess (Days)	0	
Indemnity Period (Months)	0	

Electronic Equipment Items

Computers (not Laptops), Word Processors DESK TOP COMPUTERS	\$10,000	✎
Office Equipment OFFICE EQUIPMENT	\$10,000	✎
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 system 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.

Business - Q225075BPK Inception Date: 27/01/2021 Effective Date: 27/01/2021 Expiry

Error

An error has occurred:

There has been an error processing your request.

Before you can convert this quote, you must first edit/amend the quote and complete the additional questions

Timestamp : 29/01/2021 at 09:23:07
Broking System Id : WINTEST
Intermediary Code : TSTQBEMM
TE Reference Number : QBEUAT-2155
Session Id : wD64TsZrC64NfpSdikXnlN3

Click Exit to return to the Broking System

Exit