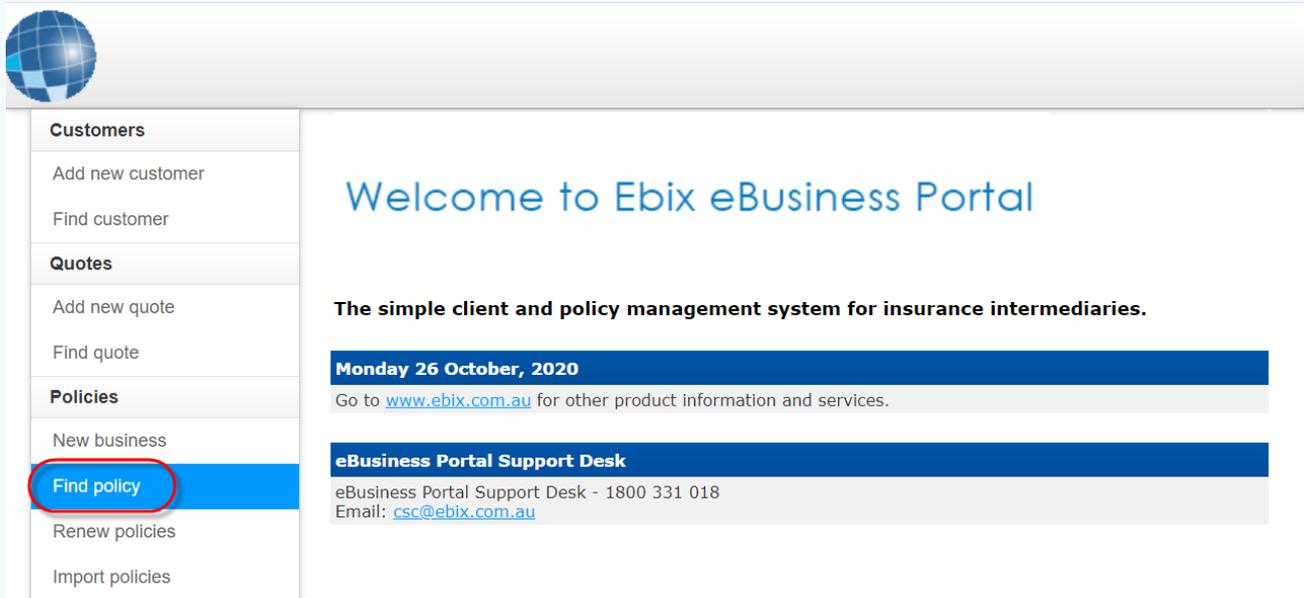


Executive – How to obtain Certificate of Currency

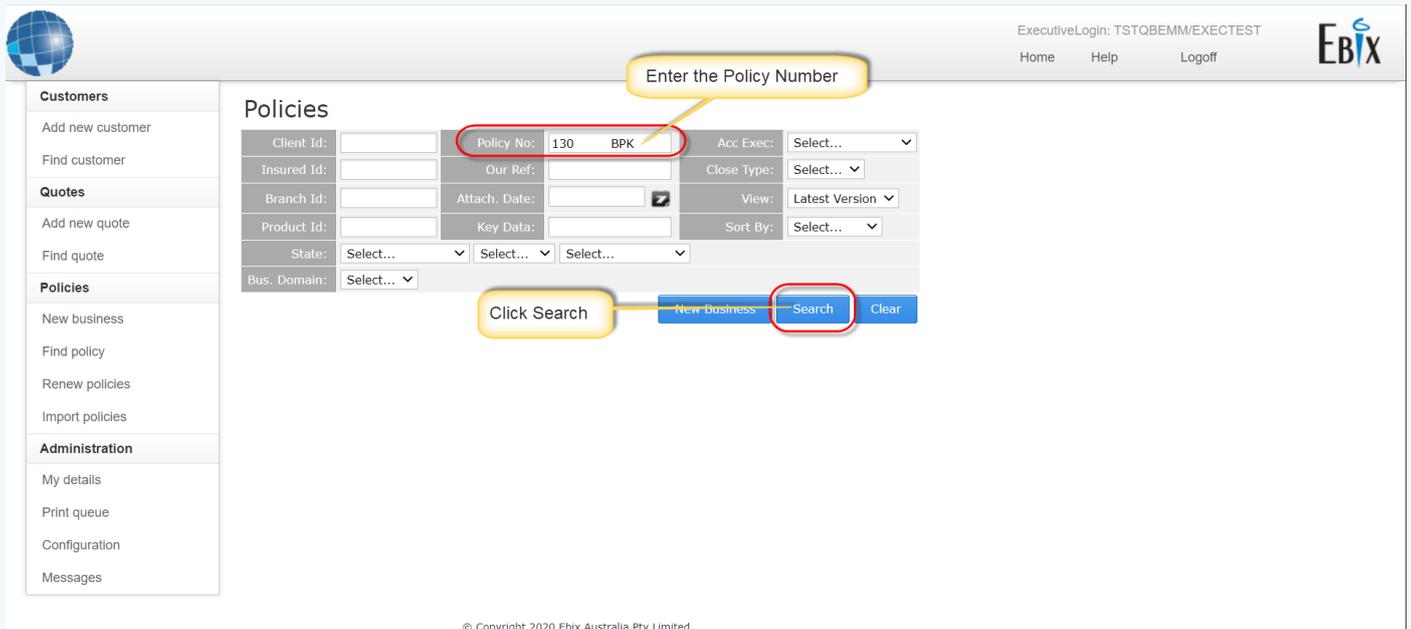
Stage 1. Log into Sunrise Executive

- Log into Sunrise Executive
- Select **Find Policy**



Stage 2. Search Policy

- Enter the **Policy No**
- Click **Search**



Stage 3. View Policy

- Click **View** on the policy transaction

ExecutiveLogin: TSTQBEMM/EXECTEST
Home Help Logoff

Customers
Add new customer
Find customer

Quotes
Add new quote
Find quote

Policies
New business
Find policy
Renew policies
Import policies

Administration
My details
Print queue
Configuration
Messages

Policies

Client Id: Policy No: 130 BPK Acc Exec: Select...
 Insured Id: Our Ref: Close Type: Select...
 Branch Id: Attach. Date: View: Latest Version
 Product Id: Key Data: Sort By: Select...
 State: Select... Select... Select...
 Bus. Domain: Select...

New Business Search Clear

Search Results

Client Id Insured Id Branch Id	Product Id Policy No Our Ref Funding Ref	Start Date End Date Attach. Date	State Bus. Domain	Acc Exec Key Data Desc	Currency Period \$ Version \$
TEST TEST SYDNEY	BPKUAT 130 BPK TSTQB-71-1-1	26 Oct 2020 26 Oct 2021 26 Oct 2020	New Business Auto Closed Accepted Sunrise	30	AUD 1,356.59 1,356.59

View Click View

Page 1

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Stage 4. View Risk Details

- Click **View Risk Details**

ExecutiveLogin: TSTQBEMM/EXECTEST
Home Help Logoff

Customers
Add new customer
Find customer

Quotes
Add new quote
Find quote

Policies
New business
Find policy
Renew policies
Import policies

Administration
My details
Print queue
Configuration
Messages

Policies

View

References

Our Ref	Policy No	Policy State
TSTQB-71-1-1	130 BPK	New Business Auto Closed Accepted

Identification

Client Id	Client Name	Product
TEST	TEST TEST	BPK UAT BusPack

Insured Id

Insured Id	Insured Name	Start Date	End Date
TEST	TEST TEST	26 Oct 2020	26 Oct 2021

Branch

Branch	Attachment Date	Premium Summary
	26 Oct 2020	AUD1,356.59

Risk Details

View Risk Details Click View Risk Details

Other Details

Description	Currency	Version \$	Period \$
Funding Ref	AUD	1,111.05	1,111.05
	Premium	0.00	0.00
	Fire Levy		

Start

Stage 5. Policy & Customer details

- Click on the **Premium** tab

Policy & customer details

Policy Summary

Here is a summary of the situations and risks you've added.

Situations	Associated Risks	Status	Premium
525420 - FLORIST, RETAIL, OPERATION 400 ADELAIDE SA 5000	Property / Business Interruption		\$1,051.34
	Liability		\$305.25

Abandon Options **Next**

Stage 6. Premium Tab

- Click on **Options**
- Then **Documents**

Policy & customer details

Policy Premium Breakdown

	FAP	Premium	Levies	<input checked="" type="checkbox"/> S/Duty	GST	Total	<input checked="" type="checkbox"/> Comm
400 ADELAIDE SA 5000							
Property	\$683.28	\$683.28	\$0.00	\$82.67	\$68.33	\$834.28	\$153.73
Fire Terrorism	\$177.77	\$177.77	\$0.00	\$21.51	\$17.78	\$217.06	\$40.00
Liability			\$0.00	\$30.25	\$25.00	\$305.25	\$56.25

Back Abandon Options **Complete** Next

Stage 7. Policy Documents

- Select Item 4 > **Certificate of Currency**

Account: 30

BUSINESS > View Policy - 130
BPK
Inception: 26/10/2020 • Effective: 26/10/2020 • Expiry: 26/10/2021

Policy documents

[< Back](#)

Documents

Document Type	Date Entered
1. Policy Schedule	26/10/2020
2. Policy TAX INVOICE	26/10/2020
3. Copy of Policy	26/10/2020
4. Certificate of Currency	

Close and go back

uat-n1

Stage 8. Policy Section

- All Policy Risks are prepopulated as "selected", however if a section is not required uncheck the risk
- Click **Save**

NOTE: If the policy has multiple locations, you can only select Risks from one location for a Certificate of Currency

Account: 30

BUSINESS > View Policy - 130
BPK
Inception: 26/10/2020 • Effective: 26/10/2020 • Expiry: 26/10/2021

Policy documents

[< Back](#)

Certificate of Currency

Select the risks you want to include on the certificate of currency.

Policy Section	Risk	Location/Type of Business
<input checked="" type="checkbox"/>	Property	0001 400 ADELAIDE SA 5000 FLORIST, RETAIL, OPERATION
<input checked="" type="checkbox"/>	Liability	0002 400 ADELAIDE SA 5000 FLORIST, RETAIL, OPERATION

Close and go back

Save

uat-n2

Stage 9. Clauses to Print

- Select one or more clauses to Print on the Certificate of Currency by clicking in the box alongside the required clause
- Click **Save**

[← Back](#)

Clauses to Print

Select the risk clauses you want to print on the certificate of currency.

	Risk	Clause Code	Clause Description
<input type="checkbox"/>	0001	B32	EXPANDED NAME OF INSURED
<input type="checkbox"/>	0001	GO2	AUS COMM. INS. PROTECTION WORDINGS

Click Save
Save

Close and go back

Note: Callouts in the image indicate 'Select Clauses to Print on Certificate by clicking in the box' pointing to the checkboxes and 'Click Save' pointing to the Save button.

Stage 10. Certificate of Currency

- The Certificate of Currency should now open for you as a PDF Document
- Click  to Save document
- Click  to Print document
- Click  to PDF document. This function will allow you to automatically email the Certificate of Currency or Save the document as a PDF

https://uat.ebiz.qbe.com/temp/gm9Q1603683315486/30U648796BPKCoFC.pdf?timestamp=1603683526713 - Internet Explorer

Business Pack Insurance Certificate of Currency

Policy Number 30 BPK

Issued By
QBE Insurance (Australia) Ltd

This certificate acknowledges that the policy referred to is in force for the period shown.
Details of the cover are listed below.

The Insured

QBE Insurance (Australia) Ltd
Head Office
Level 5, 2 Park Street
Sydney NSW 2000
ABN: 78 003 191 035
AFS Licence No: 239545



Period of Insurance
From 26/10/2020
To 26/10/2021 at 4pm



Stage 11. Close and go Back

- Once you Close the PDF Document you will be taken back to the Policy Documents screen
- Click **Close and go back**

NOTE: This will take you back to the Premium tab where you can click either **Complete** or **Abandon** to exit the QBE screens and return to Sunrise Executive.

The screenshot displays the QBE interface for viewing policy documents. At the top, the QBE logo and 'Account: 30' are visible. Below the header, there is a breadcrumb trail: 'BUSINESS > View Policy - 130' and 'BPK'. The main title is 'Policy documents'. A 'Back' link is present on the left. The central area contains a table of documents:

Document Type	Date Entered
1. Policy Schedule	26/10/2020
2. Policy TAX INVOICE	26/10/2020
3. Copy of Policy	26/10/2020
4. Certificate of Currency	

At the bottom of the document list, there is a button labeled 'Close and go back'. A yellow callout box with a pointer to this button contains the text: 'After you close the PDF Document, you need to click Close and go back'. A 'Start' button is visible in the bottom left corner of the interface.