

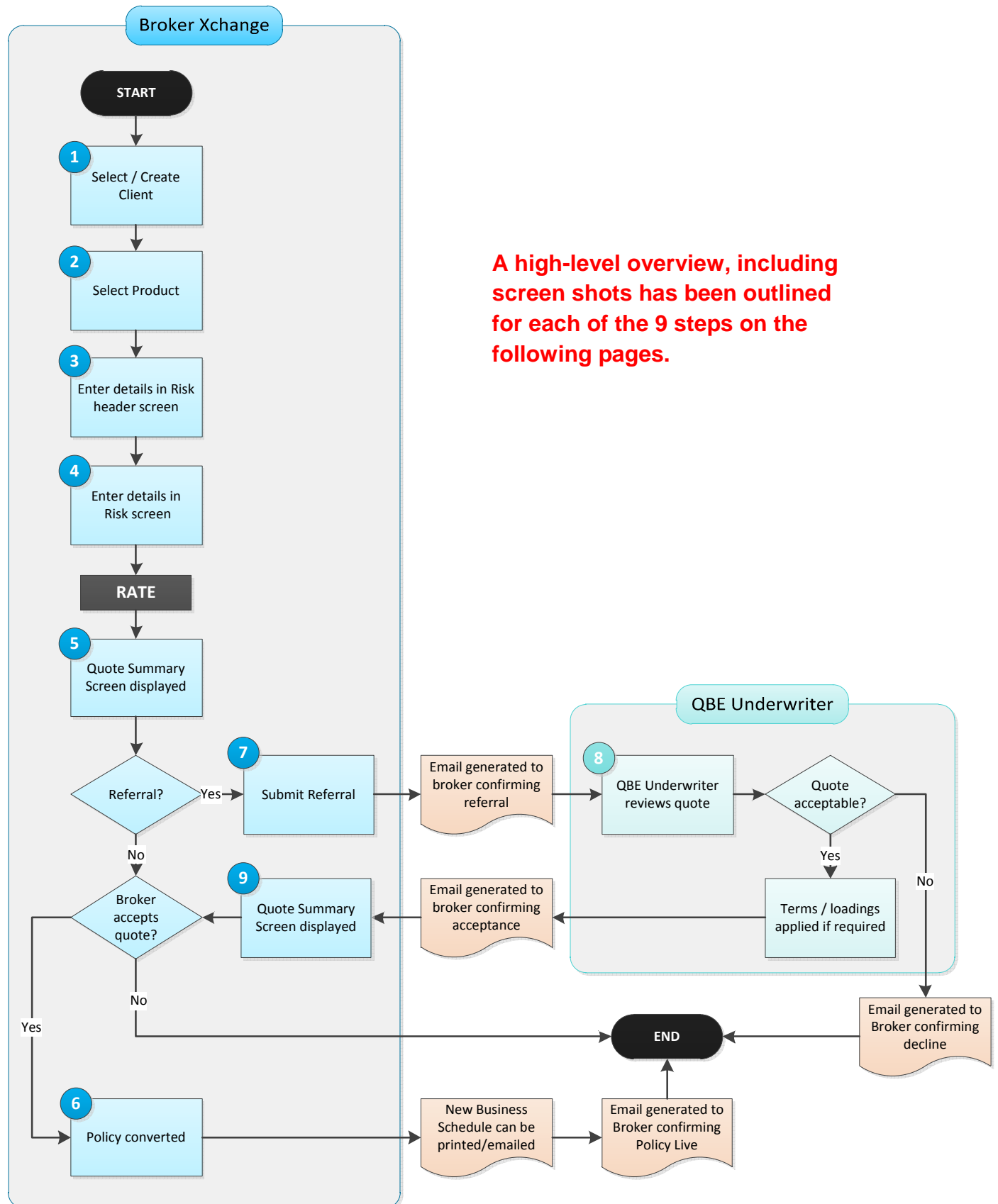


**BROKER XCHANGE
CONTRACT WORKS QUOTATION
QUICK START GUIDE**

V0.2

Creating a Contract Works Quotation in Broker Xchange

Broker Xchange Contract Works Quotation Workflow



- 1 Select the Quotes and Policies tab at the top of the Home screen, enter the Client name in the Find Quote screen and select 'Find':

Home **Quotes and Policies** Claims Canterbury Earthquake Library Contact Us Help and Support

Find client | Find quote / policy | Client details | Summary

Enter client details

Client name

Client code

Search Tip - You can use % as a wildcard, for example: sun% will find sung, suns, sunset, sunrise.

Add client Clear search **Find**

If your client is in the Search results list below please select them!
If not, select Create new client to add your client.

Create new client

Search results

test	View client New quote
------	-------------------------------------

If the Client is not found in the Search Results, enter the Client name as you would like it to appear on quotes and policies and select 'Create new client', otherwise select 'New quote' next to the relevant client.

- 2 Links for the Product Briefings & Policy Wordings are available from the Product Selection screen for all products on Broker Xchange. Select the Product:

Please select a product

Name	Documentation	
Contract Works	Product Briefing Policy Wording	Select
Civil Works	Product Briefing Policy Wording	Select
Q Pack Plus	Product Briefing Policy Wording	Select
Cargo Plus	Product Briefing Policy Wording	Select

- 3 Enter the details in the Risk header screen and click 'Next':

Home **Quotes and Policies** Claims Canterbury Earthquake Library Contact Us Help and Support

Find client | Find quote / policy | Client details | Summary | Risk header | Risk detail

Basic Details

Product	Contract Works	Intermediary	BrokerTestAgent
Insured name	<input type="text" value="Test Client"/>	Branch	<input type="text"/>
Account handler	<input type="text" value="Please Select"/>	Period of insurance end	<input type="text" value="dd/mm/yyyy"/>
Period of insurance start	<input type="text" value="dd/mm/yyyy"/>		

Next

This is a Single Risk Contract Works product catering for projects up to:

- NZ\$ 2,000,000; and
- 12 months duration

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[Find client](#)
[Find quote / policy](#)
[Client details](#)
[Summary](#)
[Risk header](#)
[Risk detail](#)

Contract Works

Location

Contract Site

Region

Please Select

Details

Project Description

Maintenance Period in Contract

Please Select

Interested parties

No interested parties.

Add

Click 'Add' to list Interested Parties if necessary. These will appear on the Certificate of Insurance once the quote is bound.

Sums Insured

Contract Works Replacement Value		Total Sum Insured		\$ 0.00
	Sums Insured		Percent of Contract Value	of Contract Value or
Principal Supplied Materials	\$ 5,000	Expediting Expenses	5.00 %	
Transit Sub Limit	\$ 50,000	Removal of Debris	5.00 %	
Storage off Contract Site Sub Limit	\$ 50,000	Professional Fees	5.00 %	
Protection Costs	\$ 10,000	Increased Costs During Construction	5.00 %	
Contractors Temporary Buildings, Portaloos	\$ 5,000	Increased Costs During Re-Construction	5.00 %	

Existing Property Items

Structures

Services

Contents

Underwriting Questions

- Is the Site:
 - Outside a mains water supply area? ☐ Yes ☐ No
 - Further than 10 kilometres from a Fire Brigade? ☐ Yes ☐ No
 - Any contour other than flat to gently sloping? ☐ Yes ☐ No
- Are foundations and/or excavations (if any) over 3 metres in depth? ☒ Yes ☐ No
- Are retaining walls (if any) over 3 metres high and/or 50 metres in total length? ☒ Yes ☐ No
- Are trenches (if any) greater than 3 metres in depth or 100 metres in total length, open at any one time? ☒ Yes ☐ No
- Do earthworks need to be undertaken other than those required for foundations, excavations or retaining walls? ☒ Yes ☐ No
- Construction, installation or work on any pool or tank greater than 200,000 litre capacity? ☒ Yes ☐ No
- Is EPS panelling to be used in more than 10% of the total area of the works? ☒ Yes ☐ No
- Does the Project require work on or within any existing property? ☒ Yes ☐ No
- Is the building more than three storeys above ground and/or more than one storey below ground? ☒ Yes ☐ No
- Are there any special features or risks associated with the works being undertaken which make the work more hazardous than would normally be expected from a project of its type? ☒ Yes ☐ No
- In the past 3 years, has the main contractor suffered any loss greater than \$50,000? ☒ Yes ☐ No
- Did ANY work at the Contract Site commence more than 14 days before this proposal was completed? ☒ Yes ☐ No

Further questions will appear if 'Yes' selected

Risk Detail Screen Continued...

Click 'Calculate' to review Premium details based on risk details provided. These will show as zero if a referral is required. Click 'Next' once all details have been completed.

Calculate Premium

Calculate

Company Premium

ND Premium

FSL Premium

Declaration

I/We declare on behalf of all proposed insureds that

1. All answers and statements in this proposal are correct and complete in every respect and there is no further information which may affect acceptance of the proposal.

2. This proposal and declaration and any other material which I/We have provided to QBE, shall be incorporated into and form the basis of the acceptance of the proposal.

3. I/We understand that QBE requires this information (which will be retained by QBE) in order to decide whether to accept this proposal and also that the Privacy Act 1993 entitles me/us to have access to and request the correction of this information.

4. QBE is authorised to disclose information received from me/us to its advisors, reinsurers and to other insurers. I/We authorise QBE to obtain from any party, information that is, in QBE's view, relevant to this proposal.

5. I/We have the insured's permission to complete this proposal on the proposed insured's behalf.

6. I/We will forward a copy of this proposal to the proposed insured as soon as practicable.

☐ I/We Agree

QBE do not require a Client's signature, but a copy of this proposal should be forwarded to the Client

Next

5 The Quote Summary screen will be displayed showing the quote status. A 'Quoted' status will display the premium, quote documentation & allow the Broker to accept the quote. A 'Referral Required' status will not display any premiums and will require the QBE Underwriter to review the quote (see steps 7-9).

Home

Quotes and Policies

Claims

Canterbury Earthquake

Library

Contact Us

Help and Support

Find client

Find quote / policy

Client details

Summary

Policy Details

Quote Number

Q000088484CAR

Cover Start Date

16/08/2011

Policy Type

New Business

Company Name

Test Client

Cover End Date

30/09/2011

Total Premium (inc. FSL + GST)

\$1,609.87

Account Handler

Malcolm MacLeod

Branch

2 Corporate

Risks

Description

Total Sum Insured

Standard Excess

Company Premium

ND Premium

FSL Premium

Status

Contract Works

\$1,270,000.00

\$500.00

\$1,100.00

\$250.00

\$49.89

Quoted

Other Excesses

Protection Costs \$1,000.00

Washout, storm, wind, flood, theft, burglary, malicious damage, faulty design, faulty workmanship, faulty materials, collapse and/or landslip, and/or subsidence - \$1,000.00

Natural Disaster 2.5% of the value of the Property Insured at risk on the date of loss, with a minimum of \$2,500.00

No Interested Parties

Documentation

Proposal Details

Quote Document

Proposal and Quotation available to download and print

Download

Email to myself

Download

Email to myself

Actions

Back to Client

Accept Quote

QBE Insurance – Commercial in Confidence

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Selecting 'Accept Quote' on a 'Quoted' or 'Underwriter Accepted' risk will generate an email to the Broker confirming the policy is now Live. The Policy Schedule will now be available to download / email:

Home	Quotes and Policies	Claims	Canterbury Earthquake	Library	Contact Us	Help and Support
Find client Find quote / policy Client details Summary						
Policy Details						
Policy Reference	P000034680CAR	Cover Start Date	16/08/2011	Policy Type	New Business	
Company Name	Test Client	Cover End Date	30/09/2011	Total Premium (inc. FSL + GST)	\$1,609.87	
Account Handler	Malcolm MacLeod	Branch	2 Corporate			
Risks						
Description	Total Sum Insured	Standard Excess	Company Premium	ND Premium	FSL Premium	Status
Contract Works	\$1,270,000.00	\$500.00	\$1,100.00	\$250.00	\$49.89	Live View
Other Excesses	Protection Costs \$1,000.00 Washout, storm, wind, flood, theft, burglary, malicious damage, faulty design, faulty workmanship, faulty materials, collapse and/or landslip, and/or subsidence - \$1,000.00 Natural Disaster 2.5% of the value of the Property Insured at risk on the date of loss, with a minimum of \$2,500.00					
No Interested Parties						
Documentation						
Proposal Details	Proposal, New Business Schedule, Policy Wording & Certificate of Insurance available to download and print			Download	Email to myself	
New Business Schedule				Download	Email to myself	
Policy Wording				Download	Email to myself	
Certificate of Insurance				Download	Email to myself	
Reports						
Report - Claim History by Policy				Download	Email to myself	
Actions						
Back to Client						

7

If a quotation results in a referral, the quotation can be submitted to a QBE Underwriter for review.

Once the referral is submitted, an email will be generated to the Broker confirming the quotation has been successfully sent for review.

Home Quotes and Policies Claims Canterbury Earthquake Library Contact Us Help and Support

Find client Find quote Client details Summary

Policy Details

Quote Number
Company Name
Account Handler
Risks
Description To
Contract Works \$
Other Excesses P
V
W
N
W
No Interested Pa
Referral Reasons L

New Business

Status

Referral Required Edit

Go Back Submit Referral

Documentation

Proposal Details Download Email to myself

Actions

Back to Client Submit Referral

8

A QBE Underwriter will review the referred quotation in the QBE policy administration system and change any terms necessary in order to be able to accept the risk, such as; Excess and/or Endorsements. An email is then generated to the Broker confirming if the risk has been accepted or declined. The 'Acceptance' email will confirm the following:

To
<Broker Email>

Subject
Referral <Quote Number> for <Client Name> has been accepted

Email Body
Dear <Broker First Name>

Client <Client Name>
Product <Product Name>
Quote No. <Quote Number>

Thank you for recently requesting a quote via QBE's Broker Xchange.
We have reviewed the information submitted and are pleased to offer terms as below.

	\$ Sum Insured
Contract Works Replacement Value	\$<Value>
Principal Supplied Materials	\$<Value>
Protection Costs	\$<Value>
Temporary Buildings	\$<Value>
Expediting Expenses	\$<Value>
Removal of Debris	\$<Value>
Professional Fees	\$<Value>
Increased Costs During Construction	\$<Value>
Increased Costs During Re-Construction	\$<Value>
Existing Structures / Services / Contents	\$<Sum of Values>
TOTAL Sum Insured	\$<Sum of Above Values>

<Note: Endorsements have been applied. To check full details, please view the Quote document

Click [here](#) to log into Broker Xchange, check terms and premium, and bind cover.

Remember, once cover is bound the Policy Schedule and wording can be printed / downloaded

Thank you for giving us the opportunity to quote. We hope you use the Broker Xchange again soon.

Kind regards

<Account Handler>
QBE Insurance

This text will only appear in the email if Endorsements have been applied

- 9 An accepted referral will provide a link on the email, enabling the Broker to log back into Broker Xchange. Once the quotation has been selected, the Quotation Summary screen will be re-displayed, showing the premium and any updated terms as applied by the Underwriter.

The quotation can now be accepted (see step 6):

Home	Quotes and Policies	Claims	Canterbury Earthquake	Library	Contact Us	Help and Support
Find client	Find quote	Client details	Summary			

Policy Details						
Quote Number	Q000086324CAR	Cover Start Date	25/07/2011	Policy Type	New Business	
Company Name	Elly UAT Test	Cover End Date	31/08/2011	Total Premium (inc. FSL + GST)	\$4,647.17	
Account Handler	Malcolm MacLeod	Branch	2 Corporate			

Risks						
Description	Total Sum Insured	Standard Excess	Company Premium	FSL Premium	ND Premium	Status
Contract Works	\$1,270,000.00	\$500.00	\$3,000.00	\$41.02	\$1,000.00	Underwriter Accepted View
Other Excesses	Protection Costs \$1,000.00 Washout, storm, wind, flood, theft, burglary, malicious damage, faulty design, faulty workmanship, faulty materials, collapse and/or landslip, and/or subsidence - \$1,000.00 Natural Disaster 2.5% of the value of the Property Insured at risk on the date of loss, with a minimum of \$2,500.00					
No Interested Parties						
Referral Reasons	Losses greater than \$50,000 in the last 3 years Additional Comments: test					
Quotation Terms	Endorsements have been applied. Please refer to the quote document for details.					

Documentation	
Proposal Details	Download Email to myself
Quote Document	Download Email to myself

Actions	
Back to Client	Accept Quote

NB: The Broker will still have to issue a Closing to send to QBE in the normal way.