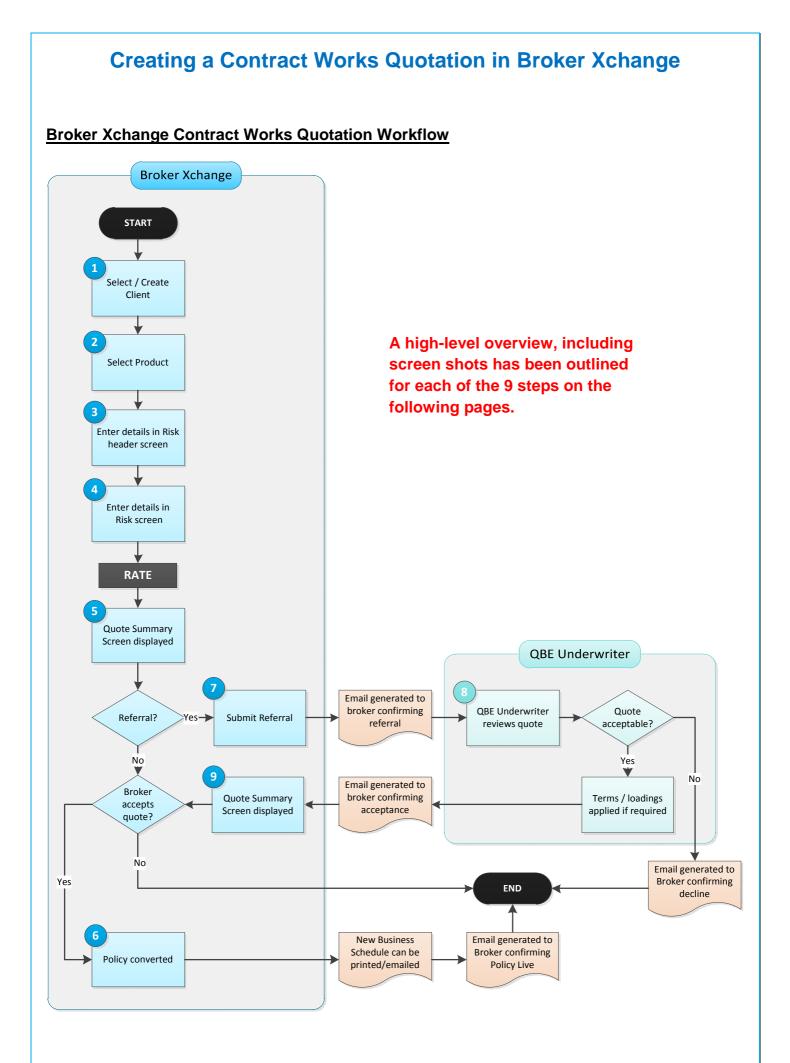


BROKER XCHANGE CONTRACT WORKS QUOTATION QUICK START GUIDE

V0.2



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 an	d Policies	Claims	Canterbury Earthquake	Library	Contact Us	Help and Support
Find clier	nt Find qu	uote / policy	Client	details Summary			
		Enter client	details				
		Client nam	е	test%			
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		Search Tip	- You can u	se % as a wildcard, for example:	sun% will fir	id sung, suns, su	nset, sunrise. Find
				Aut chent clear	search		Filld
				If your client is in the Searcl If not, select Create new cli			them!
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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.

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

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Documentation	
Product Briefing Policy Wording	Select
	Product Briefing Policy Wording

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

Home Quotes and Pol	licies Claims Cant	erbury Earthquake	Library	Contact Us	Help and Support	
Find client Find quote	/ policy Client details	Summary Ris	k header	Risk detail		
Basic Details						
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Insured name	Test Client		Intermedia	ry	BrokerTestAgent	
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4

Enter all risk details in the Risk screen:

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2. Are foundations and/or excavations (if any) over 3 metres in depth? 3. Are retaining walls (if any) over 3 metres high and/or 50 metres in total length? 4. Are trenches (if any) greater than 3 metres in depth or 100 metres in total length, open at any one time? 5. Do earthworks need to be undertaken other than those required for foundations, excavations or retaining Walls? 6. Construction, installation or work on any pool or tank greater than 200,000 litre capacity? 7. Is EPS panelling to be used in more than 10% of the total area of the works? 8. Does the Project require work on or within any existing property? 9. Is the building more than three storeys above ground and/or more than one storey below ground? 10. Are there any special features or risks associated with the works being undertaken which make the work more Are there any special features or risks associated from a project of its type?	1.2 Further than 10 kilometres f	rom a Fire Brigade?				
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4. Are trenches (if any) greater than 3 metres in depth or 100 metres in total length, open at any one time? 5. Do earthworks need to be undertaken other than those required for foundations, excavations or retaining Walls? 6. Construction, installation or work on any pool or tank greater than 200,000 litre capacity? 7. Is EPS panelling to be used in more than 10% of the total area of the works? 8. Does the Project require work on or within any existing property? 9. Is the building more than three storeys above ground and/or more than one storey below ground? 10. Are there any special features or risks associated with the works being undertaken which make the work more Yes No hazardous than would normally be expected from a project of its type?						/
5. Do earthworks need to be undertaken other than those required for foundations, excavations or retaining Walls? 6. Construction, installation or work on any pool or tank greater than 200,000 litre capacity? 7. Is EPS panelling to be used in more than 10% of the total area of the works? 8. Does the Project require work on or within any existing property? 9. Is the building more than three storeys above ground and/or more than one storey below ground? 10. Are there any special features or risks associated with the works being undertaken which make the work more Yes No hazardous than would normally be expected from a project of its type?	3. Are retaining walls (if any) over	3 metres high and/or 50) metres in total length?			
walls? 6. Construction, installation or work on any pool or tank greater than 200,000 litre capacity? 7. Is EPS panelling to be used in more than 10% of the total area of the works? 8. Does the Project require work on or within any existing property? 9. Is the building more than three storeys above ground and/or more than one storey below ground? 10. Are there any special features or risks associated with the works being undertaken which make the work more Yes No hazardous than would normally be expected from a project of its type?				-		No
6. Construction, installation or work on any pool or tank greater than 200,000 litre capacity? 7. Is EPS panelling to be used in more than 10% of the total area of the works? 8. Does the Project require work on or within any existing property? 9. Is the building more than three storeys above ground and/or more than one storey below ground? 10. Are there any special features or risks associated with the works being undertaken which make the work more Yes No hazardous than would normally be expected from a project of its type?		rtaken other than those	required for foundations, ex	cavations or re	taining Ves	· · · · · · · · · · · · · · · · · · ·
7. Is EPS panelling to be used in more than 10% of the total area of the works? 8. Does the Project require work on or within any existing property? 9. Is the building more than three storeys above ground and/or more than one storey below ground? 10. Are there any special features or risks associated with the works being undertaken which make the work more Yes No hazardous than would normally be expected from a project of its type? A selected 10. Are there any special features or risks associated with the works being undertaken which make the work more Yes No	6. Construction, installation or wo	rk on any pool or tank g	reater than 200,000 litre capa	acity?	© Yes	P No questio
8. Does the Project require work on or within any existing property? 9. Is the building more than three storeys above ground and/or more than one storey below ground? 10. 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 No	7. Is EPS panelling to be used in r	nore than 10% of the tota	al area of the works?		© Yes	D No.
10. Are there any special features or risks associated with the works being undertaken which make the work more Yes No hazardous than would normally be expected from a project of its type?	8. Does the Project require work of	on or within any existing	property?		© Yes	
hazardous than would normally be expected from a project of its type?	9. Is the building more than three	storeys above ground a	nd/or more than one storey l	below ground?	© Yes	PNo selecte
11. In the past 3 years, has the main contractor suffered any loss greater than \$50,000?				which make t	ne work more OYes	No
	11. In the past 3 years, has the ma	in contractor suffered a	ny loss greater than \$50,000?	>	© Yes	No
					~ /	

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.
	 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.
	 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.
L	I/We Agree
	QBE do not require a Client's signature, but a copy of this
	Next proposal should be forwarded to the Client

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).

Company Name Test Client Cover End Date 30/09/2011 Total Premium (inc. FSL + GST) \$1,609.8 Account Handler Malcolm MacLeod Branch 2 Corporate Premium \$1,609.8 Risks Description Total Sum Insured Standard Excess Company 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 \$1,000.00 \$250.00 \$49.89 Quoted	7
Risks 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	
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	
Excess Premium Premium Contract Works \$1,270,000.00 \$500.00 \$1,100.00 \$250.00 \$49.89 Quoted	
Other Excesses Protection Costs \$1,000.00	Edit
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	
) myself
available to download Quote Document Download Email to	o myself

QBE Insurance – Commercial in Confidence

5

6

7

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:

Policy Details Policy Reference	P000	034680CAR	Cover Start Dat	te 16	/08/2011		Policy Type		New Business
Company Name	Test	Client	Cover End Date	a 30	/09/2011		Total Premi (inc. FSL +		\$1,609.87
Account Handler	Malco	olm MacLeod	Branch	2 (Corporate				
Risks									
Description	Total	Sum Insured	Standard Excess	Compan Premiun) remium	FSL Premium	Status	
Contract Works	\$1,2	70,000.00	\$500.00	\$1,100.0	00 \$	250.00	\$49.89	Live	View
No Interested Partie	on th	ral Disaster 2.5% of t ne date of loss, with a			at risk				
Documentation	on th				at risk	Dow	nload		Email to myself
No Interested Partie Documentation Proposal Details New Business Sched	on th	 Proposal, N Schedu 	New Busines	.00 S	at risk		nload		Email to myself Email to myself
Documentation Proposal Details	on th	 Proposal, N Schedu Wording & Insurance 	New Busines Jle, Policy Certificate o available to	.00 S	l at risk	Dow			
Documentation Proposal Details New Business Sched	on thes	 Proposal, N Schedu Wording & Insurance 	New Busines Jle, Policy Certificate o	.00 S	l at risk	Dow	nload		Email to myself

If a quotation results in a referral, the quotation can be submitted to a QBE Underwriter for review. Irance – Commercial in Confidence Page | 5 Once the referral is submitted, an email will be generated to the Broker confirming the quotation has been successfully sent for review.

	and Policies Claims Canterbury Earthquake Library Contact Us Help an I quote Client details Summary	nd Support
Policy Details		
Quote Number		New Business
Company Name	Confirm Submit Referral	m ST)
Account Handler	You now have the opportunity to provide additional information, in support of this referral.	
Risks		
Description To		Status Jm
Contract Works \$	You will be notified by email when QBE has reviewed and updated your guote. In the	Referral Required
Other P Excesses V W	meantime, this quote will appear 'read only'	
N W	Go Back Submit Referral	
No Interested Par	X	
Reasons		
Documentation		
Proposal Details	Download	Email to myself
Actions		
Back to Cli	ent	Submit Referral

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:

То						
<broker email:<="" th=""><th>></th><th></th></broker>	>					
Subject						
	e Number> for <client name=""> ha</client>	s been accepted				
Email Body						
Dear <broker f<="" th=""><th>First Name></th><th></th></broker>	First Name>					
Client	<client name=""></client>					
Product	<product name=""></product>					
Quote No.	<quote number=""></quote>					
Quote No.						
Thank you for r	recently requesting a quote via QB	E's Broker Xchange.				
We have review	wed the information submitted and	are pleased to offer terms as below.				
	-	\$ Sum Insured				
	s Replacement Value	\$ <value></value>				
Principal Supp Protection Cos		\$ <value> \$<value></value></value>				
		s <value> \$<value></value></value>				
Temporary Bui Expediting Exp		\$ <value> \$<value></value></value>				
Removal of De		\$ <value> \$<value></value></value>				
Professional Fe		\$ <value> \$<value></value></value>				
	ts During Construction	\$ <value></value>				
	ts During Re-Construction	\$ <value></value>				
	ures / Services / Contents	\$ <sum of="" values=""></sum>				
TOTAL Sum In:		\$ <sum above="" of="" values=""></sum>				
<note: endors<="" th=""><th>ements have been applied. To ch</th><th>eck full details, please view the Quote document</th></note:>	ements have been applied. To ch	eck full details, please view the Quote document				
Click here to le	og into Broker Xchange, check ter	ms and premium, and bind cover.				
		•				
Remember, or	nce cover is bound the Policy Sche	edule and wording can be printed / downloaded				
Thank you for g	giving us the opportunity to quote.	We hope you use the Broker Xchange again soon.				
Kind regards						
<account hand<="" td=""><td></td><td></td></account>						
QBE Insurance	9					

This text will only appear in the email if Endorsements have been applied 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):	
THC.	quotation	Curr 110 M	be decepted		

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Home Quo	tes and Policies	Claims	Canterbury Earthqu	ake Library	Contact Us	Help and St	upport		
Find client	Find quote Clie	nt 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	Stand		mpany emium	FSL Premium	ND Premium	Status		
Contract Works	\$1,270,000.00	\$500	.00 \$3	3,000.00	\$41.02	\$1,000.00	Underwriter Accepted	View	
Other Protection Costs \$1,000.00 Excesses 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 F	Parties								
Referral Reasons	Losses greater than Additional Comment		e last 3 years						
Quotation Terms	Endorsements have	been applied.	Please refer to the quote	document for detail	s.				
Documentation									
Proposal Details Download Email to myself								yself	
Quote Docume	nt				Downlo	ad	Email to m	yself	
Actions									
Back to	o Client					[Accept Q	ıote	

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