



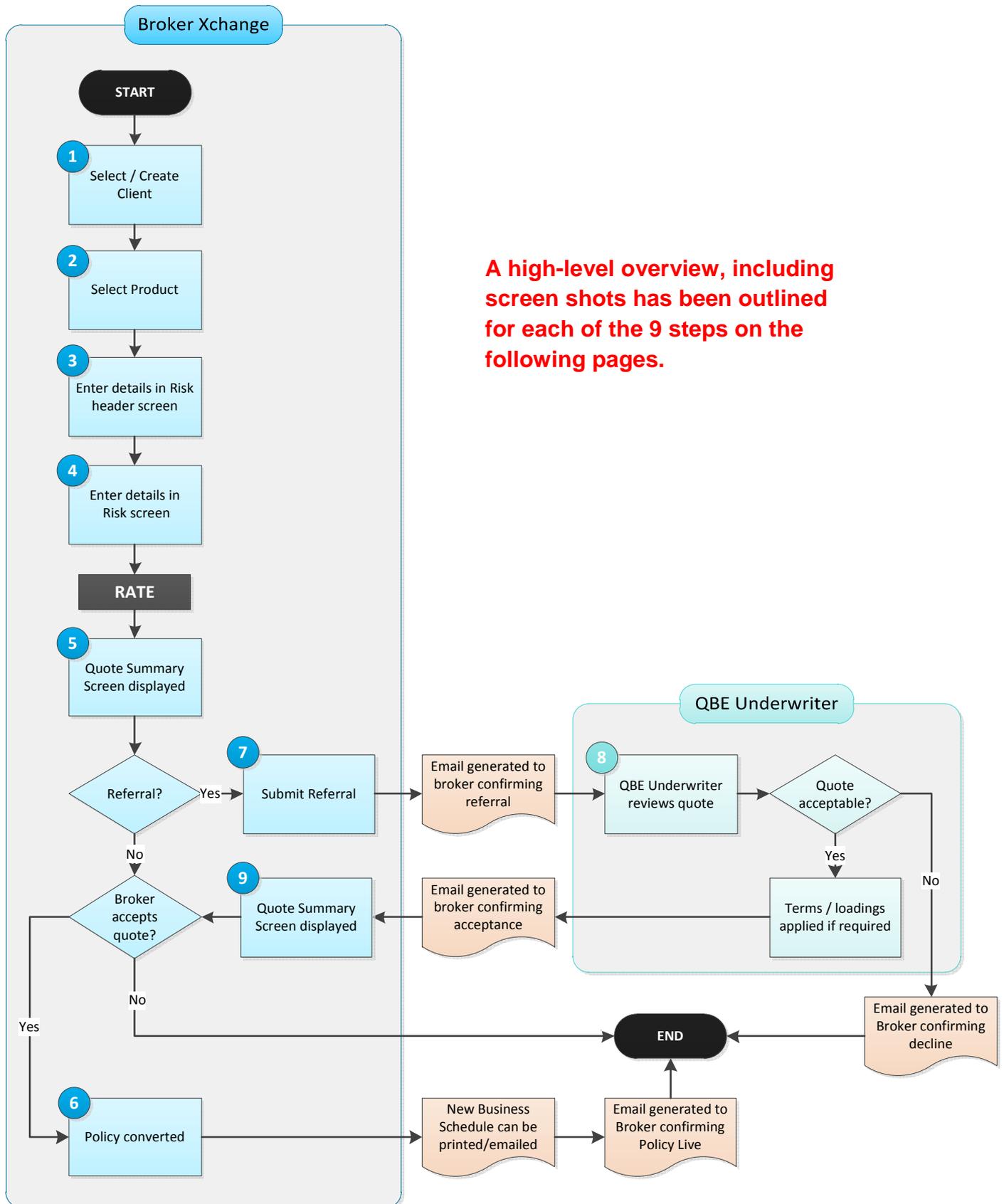
QBE

**BROKER XCHANGE
CARGO PLUS QUOTATION
QUICK START GUIDE**

V0.3

Creating a Cargo Plus Quotation in Broker Xchange

Broker Xchange Cargo Plus Quotation Workflow



A high-level overview, including screen shots has been outlined for each of the 9 steps on the following pages.

- 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 Cargo Plus

Insured name Intermediary

Account handler Branch

Period of insurance start Period of insurance end

Next

4

Enter all risk details in the Risk screen:

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	

Cargo Plus

Transit Details

Internal Transits NZ

Estimated Sendings for Insurance Period **← Enter any internal New Zealand transits here**

Worldwide Transits

No commodities entered for worldwide transit.

Enter Commodity **← Enter all details of import / export transits here**

Type of Packaging

Means of Conveyance

Sums Insured

Gross Margin in imports at time of sale (should reflect the average gross percentage added to purchase cost when goods are resold after import)

	Imports / Exports	Loss of Profits Limit
Loss Limit per Location / Conveyance	<input type="text" value="\$ 0.00"/>	<input type="text" value="\$ 0.00"/> 25% of Loss Limit per Location / Conveyance

Underwriting Questions

1. Has the insured had any claims in the last 5 years? Yes No

2. Has any insurer declined to insure, cancelled, refused renewal or imposed special terms / conditions for ANY type of insurance? Yes No

If 'Yes' to question above, please give details:

Calculate Premium

Calculate Total Premium

Declaration

I/We declare on behalf of all proposed insureds that

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

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.

- 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).

The screenshot shows the 'Quote Summary' screen for a policy. The navigation bar includes 'Home', 'Quotes and Policies', 'Claims', 'Canterbury Earthquake', 'Library', 'Contact Us', and 'Help and Support'. Below the navigation bar, there are links for 'Find client', 'Find quote', 'Client details', and 'Summary'. The 'Policy Details' section shows the following information:

Quote Number	Q000086134CGP	Cover Start Date	6/07/2011	Policy Type	New Business
Company Name	seltest	Cover End Date	6/07/2012	Total Premium (inc. FSL + GST)	\$500.00
Account Handler	Tracey Heke	Branch	3 Auckland		

The 'Risks' section shows a table with the following data:

Description	Standard Excess	Company Premium	FSL	Rate	Status	
Cargo Plus	\$250.00	\$500.00	\$0.00	0.092%	Quoted	Edit

The 'Documentation' section shows a table with the following data:

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

The 'Actions' section shows a 'Back to Client' button and an 'Accept Quote' button.

- 6 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:

The screenshot shows the 'Policy Summary' screen for a policy. The navigation bar includes 'Home', 'Quotes and Policies', 'Claims', 'Canterbury Earthquake', 'Library', 'Contact Us', and 'Help and Support'. Below the navigation bar, there are links for 'Find client', 'Find quote', 'Client details', and 'Summary'. The 'Policy Details' section shows the following information:

Policy Reference	P000033964CGP	Cover Start Date	6/07/2011	Policy Type	New Business
Company Name	seltest	Cover End Date	6/07/2012	Total Premium (inc. FSL + GST)	\$500.00
Account Handler	Tracey Heke	Branch	3 Auckland		

The 'Risks' section shows a table with the following data:

Description	Standard Excess	Company Premium	FSL	Rate	Status	
Cargo Plus	\$250.00	\$500.00	\$0.00	0.092%	Live	View

The 'Documentation' section shows a table with the following data:

Documentation	Download	Email to myself
Proposal Details	Download	Email to myself
New Business Schedule	Download	Email to myself
Policy Wording	Download	Email to myself
Certificate of Insurance	Download	Email to myself

The 'Actions' section shows a 'Back to Client' button.

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.

The screenshot shows the QBE policy administration interface. At the top, there is a navigation bar with links: Home, Quotes and Policies, Claims, Canterbury Earthquake, Library, Contact Us, and Help and Support. Below this is a secondary navigation bar with links: Find client, Find quote, Client details, and Summary. The main content area is titled 'Policy Details' and includes fields for Quote Number, Company Name, Account Handler, Risks, Description, Referral Reasons, Documentation, and Proposal Details. On the right side, there are fields for Policy Type (New Business) and Total Premium (inc. FSL + GST). A 'Status' section shows 'Referral Required' with an 'Edit' button. At the bottom, there are buttons for 'Download' and 'Email to myself'. A modal window titled 'Confirm Submit Referral' is overlaid on the page, containing a message: 'You now have the opportunity to provide additional information, in support of this referral.' Below the message is a text area and two buttons: 'Go Back' and 'Submit Referral'. A red box highlights the 'Submit Referral' button in the modal, and another red box highlights the 'Submit Referral' button on the main page. A red arrow points from the modal button to the page button.

8

A QBE Underwriter will review the referred quotation in the QBE policy administration system and update with a premium and excess amount, if the risk is an acceptable Cargo Plus cover. 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.	
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 immediately.	
Thank you for giving us the opportunity to quote. We hope you use the Broker Xchange again soon.	
Kind regards	
<Account Handler>	
QBE Insurance	

- 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 excess.

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

The screenshot displays the 'Quotation Summary' screen. At the top, there is a navigation bar with tabs for Home, Quotes and Policies, Claims, Canterbury Earthquake, Library, Contact Us, and Help and Support. Below this is a breadcrumb trail: Find client | Find quote | Client details | Summary.

The 'Policy Details' section contains the following information:

Quote Number	Q000086144CGP	Cover Start Date	28/07/2011	Policy Type	New Business
Company Name	seltest	Cover End Date	28/07/2012	Total Premium (inc. FSL + GST)	\$800.00
Account Handler	Tracey Heke	Branch	3 Auckland		

The 'Risks' section contains a table with the following data:

Description	Standard Excess	Company Premium	FSL	Rate	Status	
Cargo Plus	\$250.00	\$800.00	\$0.00	0.08%	Underwriter Accepted	View

The 'Referral Reasons' section states: Gross Margin in imports at time of sale is more than 50% Previous history - Question 2A Type of Packaging selected.

The 'Documentation' section has two rows, each with a 'Proposal Details' or 'Quote Document' label and 'Download' and 'Email to myself' buttons.

The 'Actions' section at the bottom contains two buttons: 'Back to Client' and 'Accept Quote'. The 'Accept Quote' button is highlighted with a red box.

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