



**QBE**

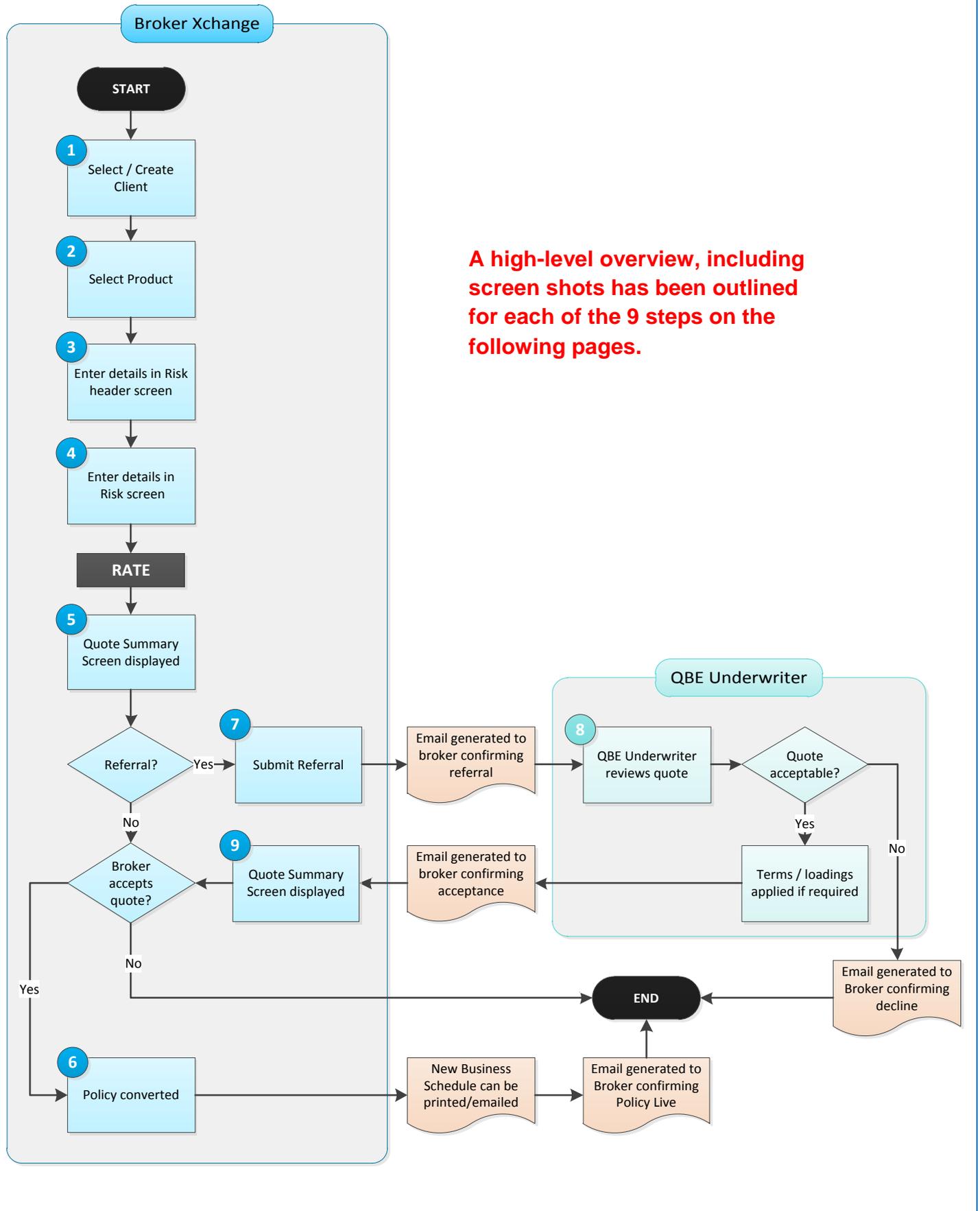
**QBE Broker Xchange  
Quick Start Guide**

**Cargo Single Transit**

V1.0

# Creating a Cargo Single Transit Quotation in Broker Xchange

## Broker Xchange Cargo Single Transit 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	<a href="#">Product briefing</a> <a href="#">Policy wording</a>	Select
Civil Works	<a href="#">Product briefing</a> <a href="#">Policy wording</a>	Select
Q Pack Plus	<a href="#">Product briefing</a> <a href="#">Policy wording</a>	Select
Cargo Plus	<a href="#">Product briefing</a> <a href="#">Policy wording</a>	Select
Cold Cargo	<a href="#">Policy wording</a>	Select
Cargo Single Transit	<a href="#">Product briefing</a> <a href="#">Wording General Cargo</a> <a href="#">Wording Temperature Sensitive</a>	Select

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

Home **Quotes and policies** Claims Natural disasters Broker library Contact us Help and support

Find / add client | Find quote / policy | Client details | Header | Details | Summary

Basic details

Insured name  Intermediary

Underwriter  Branch

Transit date  **Enter the shipping date**

Next

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Enter all risk details in the Risk screen:

Home	Quotes and policies	Claims	Natural disasters	Broker library	Contact us	Help and support
Find / add client   Find quote / policy   Client details   Header   Details   Summary						
<b>Cargo Single Transit</b>						
<div style="display: flex; justify-content: space-between;"> <span>[-] Transit Details</span> <span>Select the type of transit and enter details here</span> </div>						
Transit type	Please Select					
Origin country	Please Select	Destination country	Please Select			
Commodity category	All					
Commodity type	Please Select					
Description of goods			Is the product temperature sensitive?	<input type="checkbox"/>		
Sum insured						
Currency	New Zealand Dollar	Other Currency				
Type of Packaging	Please Select	Means of Conveyance	Please Select			
Terms of Trade	Please Select					
<div style="display: flex; justify-content: space-between;"> <span>[-] Export shipping details</span> </div>						
<input type="checkbox"/> Is a certificate of insurance required for export? <span style="float: right;">If a certificate of insurance is required to accompany export goods tick this box and complete the extra fields</span>						
<div style="display: flex; justify-content: space-between;"> <span>[-] Underwriting questions</span> </div>						
1. Has the insured had any cargo claims in the last three years that were over \$1,000? <span style="float: right;"><input type="radio"/> Yes <input type="radio"/> No</span>						
2. Has any insurer declined to insure, cancelled, refused renewal or imposed special terms / conditions for ANY type of insurance? <span style="float: right;"><input type="radio"/> Yes <input type="radio"/> No</span>						
<div style="display: flex; justify-content: space-between;"> <span>[-] Calculate premium</span> </div>						
<input type="button" value="Calculate"/>		Company Premium		FSL		
<div style="display: flex; justify-content: space-between;"> <span>[-] Declaration</span> </div>						
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 contract of insurance;						
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.						
<input type="checkbox"/> I/We Agree <span style="float: right;">QBE do not require a Client's signature, but a copy of the proposal should be forwarded to the Client</span>						
<input type="button" value="Next"/>						

Click 'Calculate' to review Premium details based on risk details provided. These will show as zero if a referral is required, and referral reasons will be listed at the bottom of the screen. Click 'Next' once all details have been completed and the declaration has been accepted.

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The Quote Summary screen will be displayed showing the quote status. A 'Quoted' status will display the premium, quote documentation & allow you 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 | Natural disasters | Broker library | Contact us | Help and support

Find / add client | Find quote / policy | Client details | Header | Details | Summary

Policy details

Quote number	Q000148234CST	Transit date	25/03/2014	Policy type	New Business
Insured name	Test Client	Total Premium (inc. GST + FSL)	\$415.80		
Underwriter	Steve Spooner	Branch	3 Auckland		

Risks

Description	Company Premium	Rate	FSL	GST	Standard Excess	Status	
Cargo Single Transit	\$415.80	0.12 %	\$0.00	\$0.00	\$250.00	Quoted	Edit

Note: There is no GST applied to this premium

Documentation

Wording	<b>Quote and Proposal documents are available for download along with a copy of the wording</b>	Download	Email to myself
Quote		Download	Email to myself
Proposal		Download	Email to myself

Actions

Back to client | Accept quote

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

Home	Quotes and policies	Claims	Natural disasters	Broker library	Contact us	Help and support
Find / add client	Find quote / policy	Client details	Header	Details	Summary	
<b>Policy details</b>						
Policy number	P000053671CST	Transit date	25/03/2014		Policy type	New Business
Insured name	Test Client				Total Premium (inc. GST + FSL)	\$415.80
Underwriter	Steve Spooner	Branch	3 Auckland			
<b>Risks</b>						
Description	Company Premium	Rate	FSL	GST	Standard Excess	Status
Cargo Single Transit	\$415.80	0.12 %	\$0.00	\$0.00	\$250.00	Live <a href="#">View</a>
<b>Documentation</b>						
Wording					<a href="#">Download</a>	<a href="#">Email to myself</a>
Proposal	<b>Proposal, New Business Schedule, Policy Wording &amp; Certificate of Insurance available to download and print</b>				<a href="#">Download</a>	<a href="#">Email to myself</a>
Certificate					<a href="#">Download</a>	<a href="#">Email to myself</a>
Schedule					<a href="#">Download</a>	<a href="#">Email to myself</a>
Endorsements					<a href="#">Download</a>	<a href="#">Email to myself</a>
<b>Actions</b>						
<a href="#">Back to client</a>			<a href="#">Add claim</a>		<a href="#">Update cover</a>	

NB: A broker Closing will still need to be sent to QBE in the normal way.

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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 you confirming the quotation has been successfully sent for review.

**Home** | **Quotes and policies** | **Claims** | **Natural disasters** | **Broker library** | **Contact us** | **Help and support**

Find / add client | Find quote / policy | Client details | Header | Details | Summary

**Policy details**

<b>Quote number</b>	Q000148235CST	<b>Transit date</b>	25/03/2014	<b>Policy type</b>	New Business
<b>Insured name</b>	Test Client			<b>Total Premium (inc. GST + FSL)</b>	\$0.00
<b>Underwriter</b>					
<b>Risks</b>	You now have the opportunity to provide additional information, in support of this referral.				
<b>Description</b>	<input type="text"/>				
<b>Referral reasons:</b>	You will be notified by email when QBE has reviewed and updated your quote. In the meantime, this quote will appear 'read only'				
<b>Documentation</b>	<input type="button" value="Go Back"/> <input type="button" value="Submit Referral"/>				
<b>Wording</b>	<input type="button" value="Download"/> <input type="button" value="Email to myself"/>				
<b>Proposal</b>	<input type="button" value="Download"/> <input type="button" value="Email to myself"/>				
<b>Actions</b>	<input type="button" value="Back to client"/> <input type="button" value="Submit referral"/>				

**Confirm Submit Referral**

You now have the opportunity to provide additional information, in support of this referral.

**Status**

Referral Required

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 Single Transit cover.

An email is then sent to you confirming if the risk has been accepted or declined. The 'Acceptance' email will confirm the following:

<b>To</b>	
<Broker Email>	
<b>Subject</b>	
Referral <Quote Number> for <Client Name> has been accepted	
<b>Email Body</b>	
Dear <Broker First Name>	
<b>Client</b>	<Client Name>
<b>Product</b>	<Product Name>
<b>Quote No.</b>	<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 <a href="#">here</a> 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	

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An accepted referral will provide a link on the email, enabling you 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):

Home	Quotes and policies	Claims	Natural disasters	Broker library	Contact us	Help and support
Find / add client   Find quote / policy   Client details   Header   Details   Summary						
Policy details						
Quote number	Q000148235CST	Transit date	25/03/2014		Policy type	New Business
Insured name	Test Client			Total Premium (inc. GST + FSL)	\$230.67	
Underwriter	HBrokerTestAgent06	Branch	3 Auckland			
Risks						
Description	Company Premium	Rate	FSL	GST	Standard Excess	Status
Cargo Single Transit	\$196.20	0.07 %	\$4.38	\$30.09	\$250.00	Underwriter Accepted <a href="#">View</a>
Referral reasons:	Packaging is referred.					
Documentation						
Wording			<a href="#">Download</a>		<a href="#">Email to myself</a>	
Quote			<a href="#">Download</a>		<a href="#">Email to myself</a>	
Proposal			<a href="#">Download</a>		<a href="#">Email to myself</a>	
Actions						
<a href="#">Back to client</a>					<a href="#">Accept quote</a>	

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Once the policy is bound it is possible to update many of the cover details by adding an endorsement. The process for an endorsement is very similar to the new quote process described above.

Home	Quotes and policies	Claims	Natural disasters	Broker library	Contact us	Help and support
Find / add client   Find quote / policy   Client details   Header   Details   Summary						
Policy details						
Policy number	P000053672CST	Transit date	25/03/2014		Policy type	New Business
Insured name	Test Client			Total Premium (inc. GST + FSL)	\$230.67	
Underwriter	HBrokerTestAgent06	Branch	3 Auckland			
Risks						
Description	Company Premium	Rate	FSL	GST	Standard Excess	Status
Cargo Single Transit	\$196.20	0.07 %	\$4.38	\$30.09	\$250.00	Live <a href="#">View</a>
Actions						
<a href="#">Back to client</a>			<a href="#">Add claim</a>		<a href="#">Update cover</a>	