QBE Broker Xchange
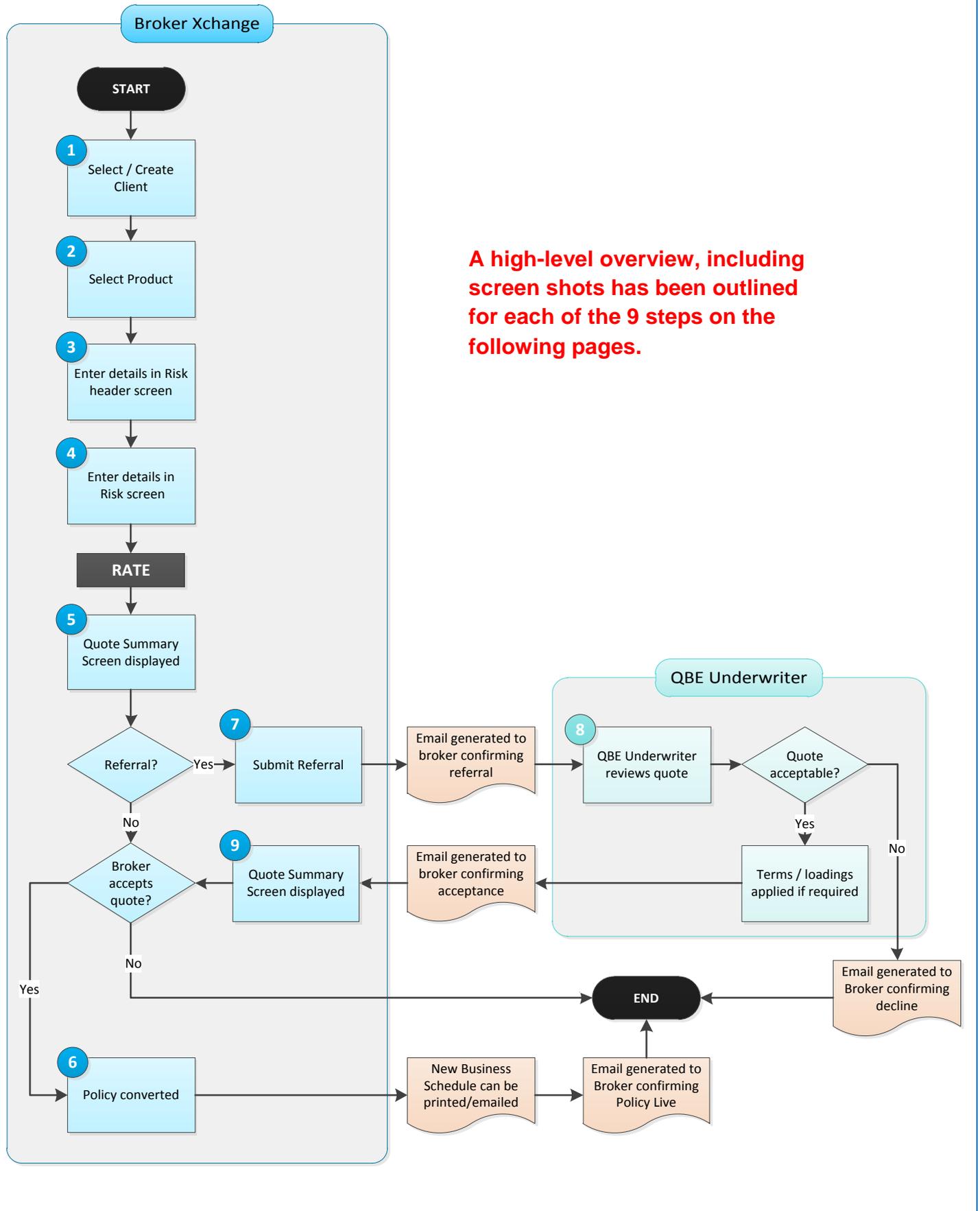# Quick Start Guide

Cargo Single Transit

V1.0

Creating a Cargo Single Transit Quotation in Broker Xchange

Broker Xchange Cargo Single Transit Quotation Workflow

Broker Xchange

START

1. Select / Create Client

2. Select Product

3. Enter details in Risk header screen

4. Enter details in Risk screen

RATE

5. Quote Summary Screen displayed

Referral? — Yes → 7. Submit Referral → Email generated to broker confirming referral

No

Broker accepts quote?

No → END

Yes → 6. Policy converted → New Business Schedule can be printed/emailed → Email generated to Broker confirming Policy Live → END

9. Quote Summary Screen displayed ← Email generated to broker confirming acceptance

QBE Underwriter

8. QBE Underwriter reviews quote → Quote acceptable?

Yes → Terms / loadings applied if required

No → Email generated to Broker confirming decline → END

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 | test% |
| 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
Cold Cargo	Policy wording	Select
Cargo Single Transit	Product briefing Wording General Cargo Wording Temperature Sensitive	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	Test Client	Intermediary	HBrokerTestAgent06
Underwriter	Steve Spooner	Branch	3 Auckland
Transit date	25/03/2014		← **Enter the shipping date**

[Next]

4 Enter all risk details in the Risk screen:

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.

5 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		Download	Email to myself
Quote	**Quote and Proposal documents are available for download along with a copy of the wording**	Download	Email to myself
Proposal		Download	Email to myself

Actions

Back to client | Accept quote

6 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

Policy details

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		

Risks

Description	Company Premium	Rate	FSL	GST	Standard Excess	Status	
Cargo Single Transit	$415.80	0.12 %	$0.00	$0.00	$250.00	Live	View

Documentation

Wording	Download	Email to myself
Proposal	Download	Email to myself
Certificate	Download	Email to myself
Schedule	Download	Email to myself
Endorsements	Download	Email to myself

Proposal, New Business Schedule, Policy Wording & Certificate of Insurance available to download and print

Actions

| Back to client | | Add claim | Update cover |

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

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 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

Quote number	Q000148235CST	Transit date	25/03/2014	Policy type	New Business
Insured name	Test Client			Total Premium (inc. GST + FSL)	$0.00
Underwriter					

Risks

Description				Status	
Cargo Single Transit				Referral Required	Edit

Confirm Submit Referral

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

You will be notified by email when QBE has reviewed and updated your quote. In the meantime, this quote will appear 'read only'

Go Back	Submit Referral

Referral reasons:

...ompleted.

Documentation

Wording		...wnload	Email to myself
Proposal		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 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:

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 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):

10	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.