



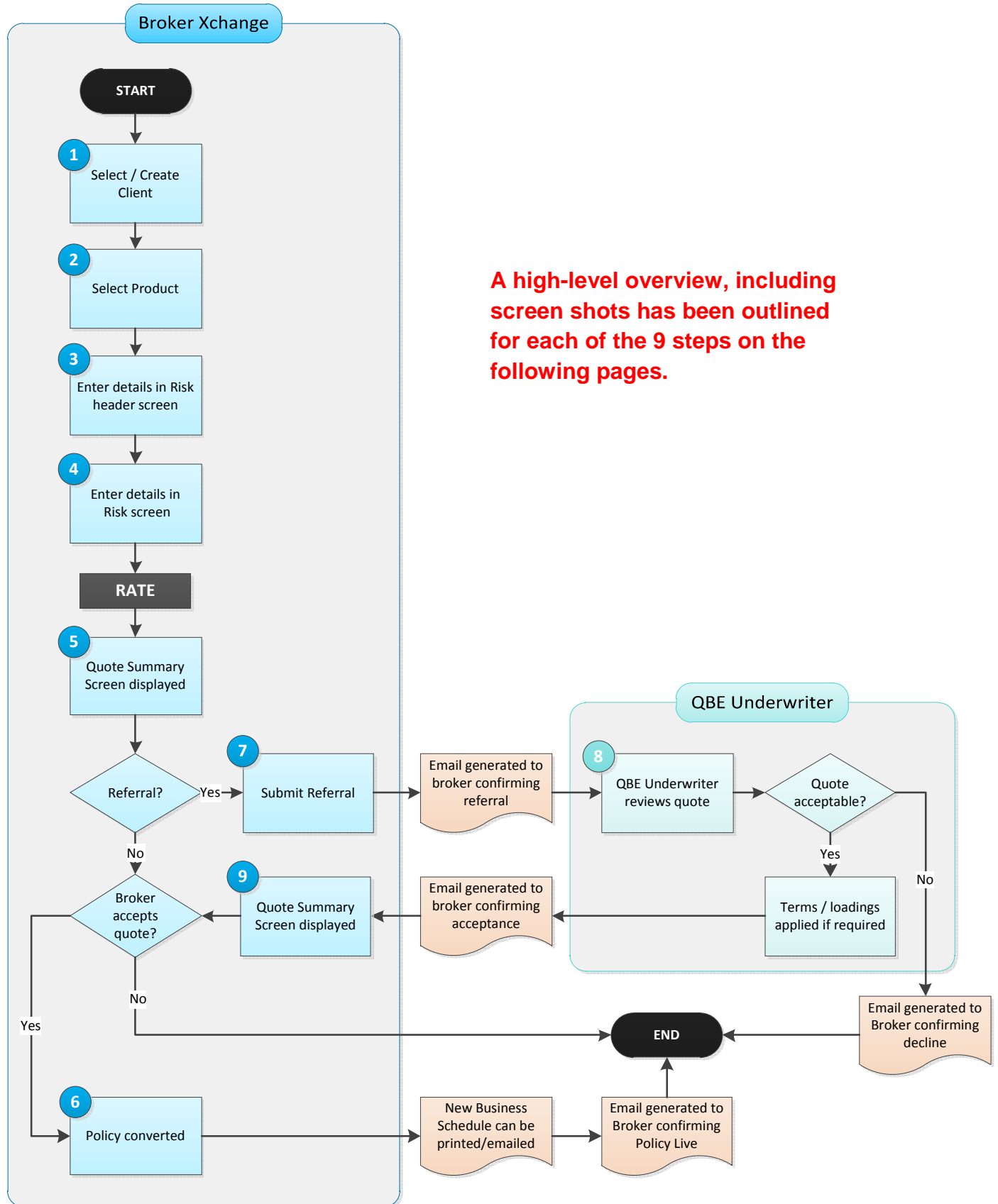
QBE

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

V0.2

Creating a Civil Works Quotation in Broker Xchange

Broker Xchange Civil Works 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 Civil Works

Insured name Intermediary

Account handler Branch

Period of insurance start

Next

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

- NZ\$ 1,000,000; and
- 12 months duration

It is suitable for earthworks, subdivisions, drainage, roading and pipeline contracts etc.

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

Civil Works

Location

Contract Site Region Please Select

Details

Project Description Maintenance Period in Contract Please Select

Exclude Fire Risk? Subdivision, Earthworks or Drainage Contract?

Fire Risk Exclusion Reason

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

Civil Works Replacement Value		Total Sum Insured	
		\$ 0	
	Sums Insured	Percent of Contract Value	of Contract Value or
Principal Supplied Materials	\$ 5,000	Expediting Expenses 5.00 %	<input style="width: 50px;" type="text"/>
Transit Sub Limit	\$ 50,000	Removal of Debris 5.00 %	<input style="width: 50px;" type="text"/>
Storage off Contract Site Sub Limit	\$ 50,000	Professional Fees 5.00 %	<input style="width: 50px;" type="text"/>
Protection Costs	\$ 10,000	Increased Costs During Construction 5.00 %	<input style="width: 50px;" type="text"/>
Contractors Temporary Buildings, Portaloo's	\$ 5,000	Increased Costs During Re-Construction 5.00 %	<input style="width: 50px;" type="text"/>

Existing Property Items

Structures Services Contents

Underwriting Questions

1. Is the site situated in an area prone to flooding	<input type="radio"/> Yes <input type="radio"/> No
2. Are foundations and/or excavations (if any) over 5 metres in depth?	<input type="radio"/> Yes <input type="radio"/> No
3. Are retaining walls (if any) over 5 metres high and/or 100 metres in total length?	<input type="radio"/> Yes <input type="radio"/> No
4. Are trenches (if any) greater than 3 metres in depth or 300 metres in total length, open at any one time?	<input type="radio"/> Yes <input type="radio"/> No
5. Does the contract involve directional drilling, thrust boring or pipe ramming for a diameter greater than 300mm?	<input type="radio"/> Yes <input type="radio"/> No
6. Does the contract involve "Wet Works"? (i.e. a contract undertaken in whole or in part in a stream, watercourse, river, lake, sea, canal, reservoir, dam, syphon, harbour facility, docks, breakwaters or jetties except culverts and water intakes)	<input type="radio"/> Yes <input type="radio"/> No
7. Does the contract involve shafts or tunnels?	<input type="radio"/> Yes <input type="radio"/> No
8. Does the contract involve construction, installation or work on any pool or tank greater than 200,000 litre capacity?	<input type="radio"/> Yes <input type="radio"/> No
9. Does the Project require work on or within any existing property?	<input type="radio"/> Yes <input type="radio"/> No
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 the type of work being performed?	<input type="radio"/> Yes <input type="radio"/> No
11. Has the Main Contractor suffered any loss in the past three years greater than \$50,000?	<input type="radio"/> Yes <input type="radio"/> No
12. Did ANY work at the Contract Site commence more than 14 days before this proposal was completed?	<input type="radio"/> Yes <input type="radio"/> 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	Q000088486CVL	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)	\$2,012.37
Account Handler	Malcolm MacLeod	Branch	2 Corporate		

Risks

Description	Total Sum Insured	Standard Excess	Company Premium	ND Premium	FSL Premium	Status
Civil Works	\$1,270,000.00	\$2,500.00	\$1,500.00	\$200.00	\$49.89	Quoted
<p>Other Excesses Protection Costs \$1,000.00</p> <p>Washout, storm, wind, flood, theft, burglary, malicious damage, faulty design, faulty workmanship, faulty materials, collapse and/or landslip, and/or subsidence - \$1,000.00</p> <p>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</p>						

No Interested Parties

Documentation

Proposal Details	Proposal and Quotation available to download and print	Download	Email to myself
Quote Document		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 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
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Find client | Find quote / policy | Client details | Summary

Policy Details

Policy Reference	P000034681CVL	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)	\$2,012.37
Account Handler	Malcolm MacLeod	Branch	2 Corporate		

Risks

Description	Total Sum Insured	Standard Excess	Company Premium	ND Premium	FSL Premium	Status
Civil Works	\$1,270,000.00	\$2,500.00	\$1,500.00	\$200.00	\$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
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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.

The screenshot shows the QBE policy administration system interface. At the top, there are navigation tabs: Home, Quotes and Policies, Claims, Canterbury Earthquake, Library, Contact Us, and Help and Support. Below the navigation is a search bar with options: Find client, Find quote, Client details, and Summary. The main content area is divided into sections: Policy Details, Documentation, and Actions. The Policy Details section is currently displaying a 'Confirm Submit Referral' dialog box. The dialog box has a title bar and a main content area with a message and a text input field. Below the input field are two buttons: 'Go Back' and 'Submit Referral'. The Documentation section shows a table with columns for 'Proposal Details', 'Download', and 'Email to myself'. The Actions section at the bottom has a 'Back to Client' button and a 'Submit Referral' button. A red box highlights the 'Referral Required' status in the 'Status' column of the table, and another red box highlights the 'Submit Referral' button in the actions section. A red arrow points from the 'Submit Referral' button in the dialog to the 'Submit Referral' button in the actions section.

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
Civil 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	Q000086325CVL	Cover Start Date	25/07/2011	Policy Type	New Business	
Company Name	Elly UAT Test	Cover End Date	30/09/2011	Total Premium (inc. FSL + GST)	\$1,459.76	
Account Handler	Malcolm MacLeod	Branch	2 Corporate			
Risks						
Description	Total Sum Insured	Standard Excess	Company Premium	FSL Premium	ND Premium	Status
Civil Works	\$332,500.00	\$1,000.00	\$1,000.00	\$19.36	\$250.00	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: Elly Test Referral					
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.