



Sales Quotation System

User Manual

Broker Version

(Version 6.6.11G)

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1. Introduction

The Sales Quotation System (SQS) enables user to create new business quotation and print illustration documents for Standard Life's products. The functions of SQS are classified into 2 categories:

Quotation (section 4)

This section allows user to create new business quotation. From the quotation details, user can preview and print illustration document for customer.

User Maintenance (section 5)

This section allows user to maintain user information and default setting for printing quotation.

2. System Login

Step 1: *Method 1*



Double click the icon **SQSv66G** (SQS) from the desktop.

Method 2

From the **Start** menu, click **All Programs** and then **Standard Life (Asia) Ltd.** Click **Sales Quotation System** and then "SQS.exe" (Fig. 2.1).

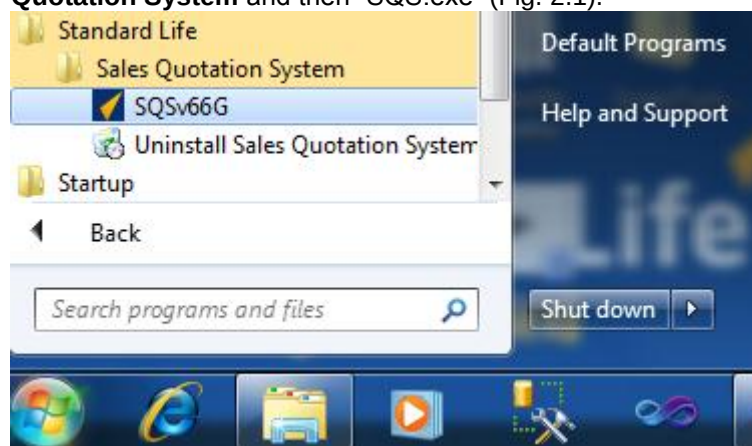


Fig. 2.1 Login Sales Quotation System from Start Menu

The login screen (Fig. 2.2) will be displayed.

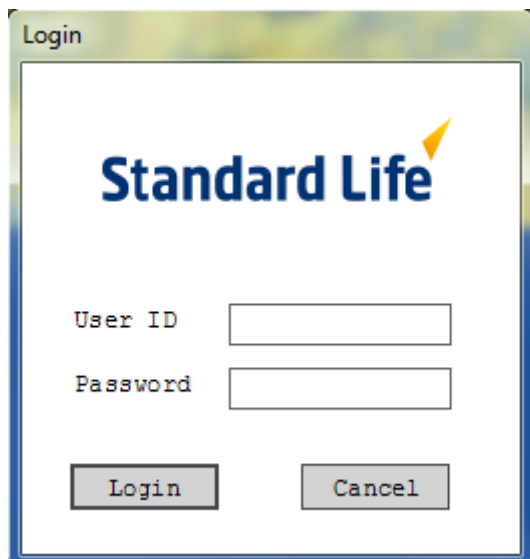


Fig. 2.2 Login screen

- Step 2: Enter User ID (Refer to section 5.1 for registering a new user).
- Step 3: Enter the password.
- Step 4: If User ID or Password is invalid, an error screen Fig.2.3 and Fig.2.4 will be prompted. Perform Step 2 or Step 3 again.

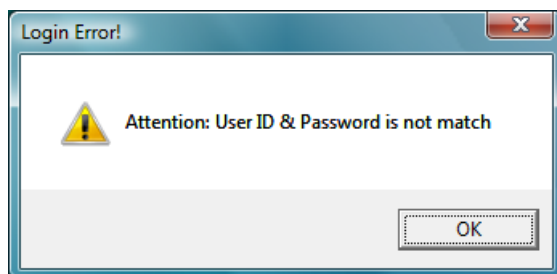


Fig. 2.3 Invalid user ID and password

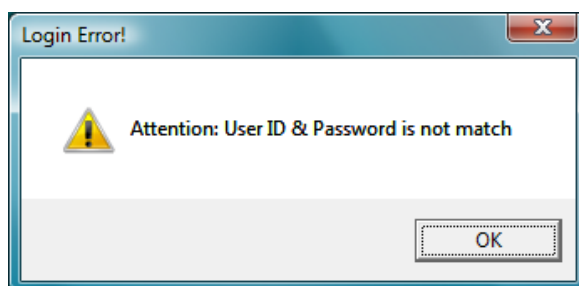


Fig. 2.4 Invalid password

3. Main Menu

After successful login, the Main Menu screen Fig.3.1 will be displayed.

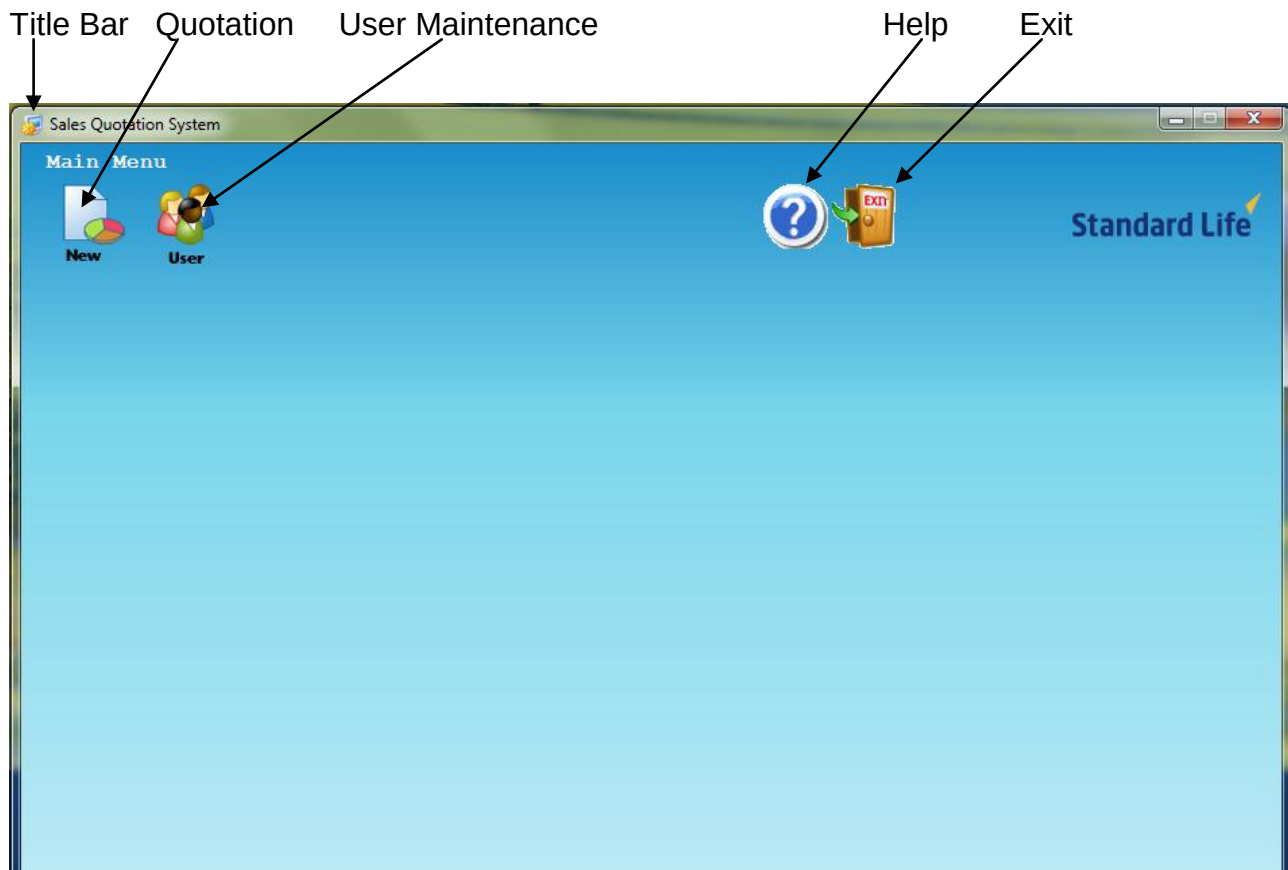


Fig.3.1 Main Menu screen

System Bar

It displays the system name that you are working on.

Title

It displays the section that you are working on.

Menu Bar

It consists of 2 menu items: Quotation (section 4), User Maintenance (section 5), Help and Exit. Within each menu item, there will be different sub-menu items.

4. Quotation

This section allows user to create new business quotation and print illustration documents for Standard Life's products.

Fig. 4.1 shows the screen you will see when **Quotation**  was clicked on the Main Menu screen.

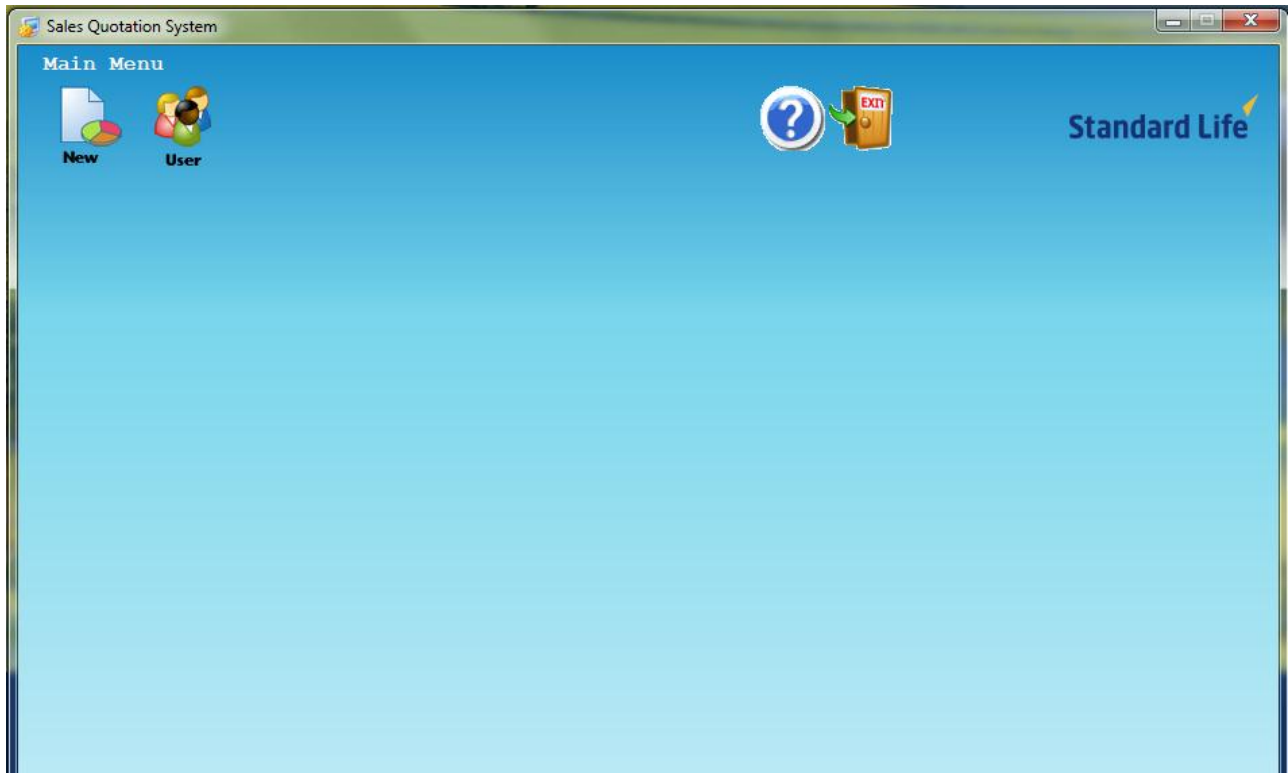


Fig. 4.1 Screen for Quotation

On the Quotation Screen, user can:

- Create New Quotation (section 4.1)
- Preview Quotation (section 4.2)
- Print Quotation (section 4.3)
- Save Quotation (section 4.4)
- Return to Main Menu (section 4.5)

4.1 Create New Quotation

To create quotation, click the new icon  on the Quotation screen, it brings you to the screen. Fig.4.1.1.

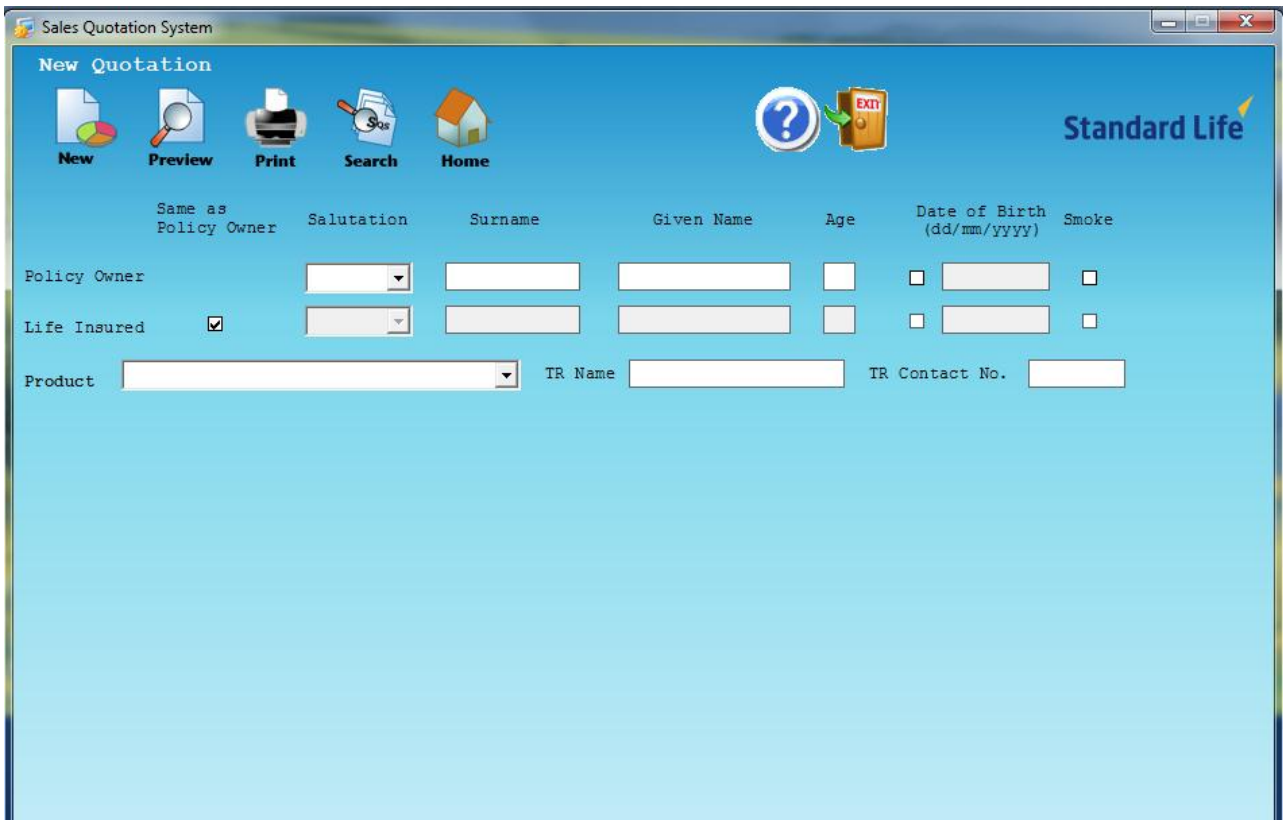


Fig.4.1.1 Creating New Quotation Screen

- Step 1: Enter Policy Owner, Life Insured and Policy Payer details. Uncheck the check box if Life Insured/Policy Payer differs from Policy Owner.
- Step 2: Enter the TR Name and TR Contact No.
- Step 3: Select product from the Product combo box, there are four types of product available:

- Term Product (Section 4.1.1)
- Unit Linked Product (Section 4.1.2)
- Unit Linked With Protection Product (section 4.1.3)
- Single Investment Product (section 4.1.4)

ATTENTION: Whenever you enter new information, the figures in Quotation Summary will be

removed until you click <<Preview>> icon  again to recalculate the figures.

4.1.1 Term Product

Select Term Product from the Product combo box (e.g. Perpetual Protector), it brings you to the screen Fig.4.1.1.1.

The screenshot shows the 'New Quotation' window in the 'Sales Quotation System'. The window has a blue header with icons for 'New', 'Preview', 'Print', 'Search', and 'Home'. The 'Standard Life' logo is in the top right. The main form is divided into several sections:

- Policy Owner:** Fields for 'Same as Policy Owner' (checkbox), 'Salutation' (dropdown: Miss), 'Surname' (text: Wong), 'Given Name' (text: tester), 'Age' (text: 20), 'Date of Birth' (dd/mm/yyyy), and 'Smoke' (checkbox).
- Life Insured:** Fields for 'Life Insured' (checkbox), 'Salutation' (dropdown: Miss), 'Surname' (text: Wong), 'Given Name' (text: tester), 'Age' (text: 20), 'Date of Birth' (dd/mm/yyyy), and 'Smoke' (checkbox).
- Product:** A dropdown menu showing 'Perpetual Protector'. Fields for 'TR Name' and 'TR Contact No.' are also present.
- Plan Details:** Fields for 'Policy Term' (dropdown: 10), 'Policy Currency' (dropdown: HKD), 'Payment Frequency' (dropdown: Annually), and 'Desired Sum Insured' (text field).
- Optional Rider:** A list of checkboxes for various riders: 'Rider-at-Ease', 'Accident Rider', 'AcciCare Rider', 'Hospital Cash Rider', 'Critical Illness Lifetime Rider', and 'Premium Waiver Rider'. Each rider has a 'Sum Insured' text field and a 'CALC' button.
- Quotation Summary:** A section at the bottom with a 'Total Amount Payable' text field showing '0.00' and a 'Broker Name' text field.

Fig.4.1.1.1 Term Product (Perpetual Protector)

Plan Details:

Select:

- Policy Term (Maybe fixed for some products)
- Policy Currency (HKD/USD)
- Payment Frequency (Annually/Semi-annually/Quarterly/Monthly)

Enter:

- Desired Sum Insured

Check and Enter:

- *Rider-at-Ease (Check and enter a sum insured $\geq$ HK\$200000 if you want to select Rider-at-Ease)
- *Accident Rider (Check and enter a sum insured $\geq$ HK\$200000 if you want to select Accident Rider and then select a class for Accident Rider, "Class 1/Class 2/Class 3")
- *AcciCare Rider (Check and enter a sum insured $\geq$ HK\$200000 if you want to select AcciCare Rider and then select a class for Accident Rider, "Class 1/Class 2/Class 3")
- *Hospital Cash Rider (Check and enter a sum insured $\geq$ HK\$300 if you want to select Hospital Cash Rider)

Check:

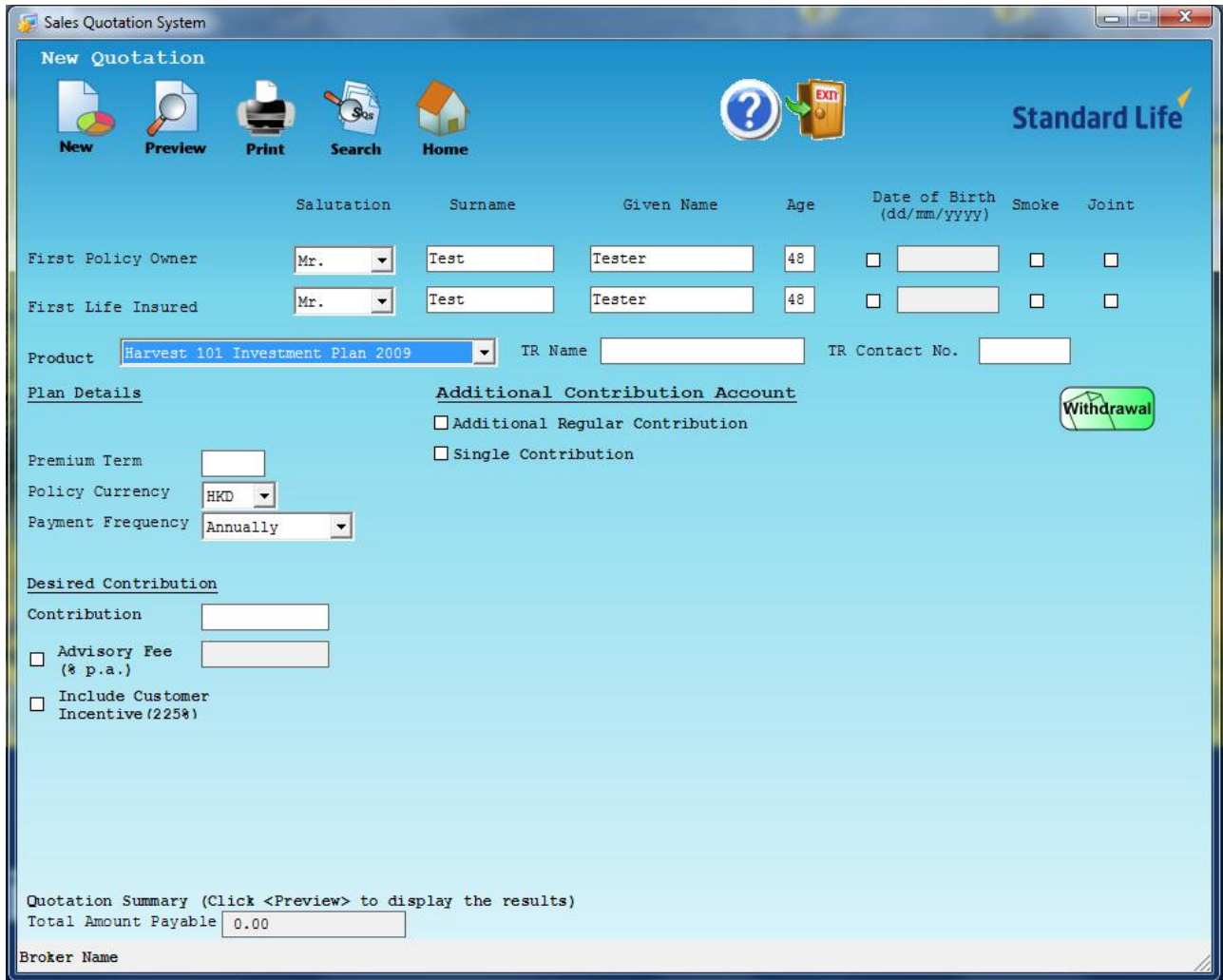
- Waiver of Premium Rider (Check if you want to select Waiver of Premium Rider)

Quotation Summary: It shows the Total Amount Payable per payment frequency.

* Can use calculate function  (Section 4.1.6)

4.1.2 Unit Linked Product

Select Unit Linked Product from the Product combo box (e.g. Harvest 101 Investment Plan 2009), it brings you to the screen Fig.4.1.2.1.



The screenshot shows the 'Sales Quotation System' window with a 'New Quotation' title bar. The interface is divided into several sections:

- Navigation:** Icons for New, Preview, Print, Search, and Home are at the top left. A help icon and an 'EXIT' button are at the top right, next to the 'Standard Life' logo.
- Personal Details:** Fields for Salutation, Surname, Given Name, Age, Date of Birth (dd/mm/yyyy), Smoke, and Joint are provided. Two rows are shown for 'First Policy Owner' and 'First Life Insured', both with 'Mr.' as salutation and 'Test' as surname and given name, and age 48.
- Product Selection:** A dropdown menu for 'Product' is set to 'Harvest 101 Investment Plan 2009'. Fields for 'TR Name' and 'TR Contact No.' are also present.
- Plan Details:** Fields for 'Premium Term', 'Policy Currency' (set to HKD), and 'Payment Frequency' (set to Annually) are included.
- Additional Contribution Account:** Checkboxes for 'Additional Regular Contribution' and 'Single Contribution' are shown, along with a 'Withdrawal' button.
- Desired Contribution:** Fields for 'Contribution', 'Advisory Fee (% p.a.)', and 'Include Customer Incentive (225%)' are provided.
- Quotation Summary:** A section at the bottom with a 'Quotation Summary (Click <Preview> to display the results)' label and a 'Total Amount Payable' field showing '0.00'.
- Broker Name:** A field at the very bottom for the broker's name.

Fig.4.1.2.1 Unit Linked Product (Harvest 101 Investment Plan)

Plan Details:**Select:**

- Policy Currency (EUR/GBP/HKD/JPY/USD)
- Payment Frequency (Annually/Semi-annually/Quarterly/Monthly)

Enter:

- Premium Term (Term must be between 5 and 32 years inclusive)
- Desired Contribution (Amount must be $\geq$ HK\$8640)

Check and Enter:

- Desired Contribution (Amount must be $\geq$ HK\$8640)

-

Check:

- Include Customer Incentive (Check if you want to select Include Customer Incentive)

4.1.3 Unit Linked With Protection Product

Select Unit Linked With Protection Product from the Product combo box (e.g. LifeMaster), it brings you to the screen Fig.4.1.3.1.

Sales Quotation System

New Quotation

Icons: New, Preview, Print, Search, Home, Help, Exit

Standard Life

Same as Policy Owner: ☐ Salutation: Mr. Surname: Test Given Name: Tester Age: 48 Date of Birth: (dd/mm/yyyy) Smoke: ☐

Life Insured: ☐ Salutation: Mr. Surname: Test Given Name: Tester Age: 48 Date of Birth: (dd/mm/yyyy) Smoke: ☐

Product: LifeMaster TR Name: TR Contact No.:

Plan Details

Policy Term: 51 Premium Term: 51 Policy Currency: HKD Payment Frequency: Annually

Desired Contribution: Sum Insured: Death Benefit Option: Increasing

Optional Rider

☐ Rider-at-Ease Sum Insured: CALC

☐ Accident Rider Class: Sum Insured: CALC

☐ AcciCare Rider Class: Sum Insured: CALC

☐ Hospital Cash Rider Sum Insured: CALC

☐ Critical Illness Lifetime Rider Sum Insured: CALC

☐ Premium Waiver Rider

Additional Contribution Account

☐ Scheduled Contribution (Top-up) Contribution:

Quotation Summary (Click <Preview> to display the results)

Total Amount Payable: 0.00

Broker Name:

Fig.4.1.3.1 Unit Linked With Protection Product (LifeMaster)

Plan Details:

Select:

- Policy Currency (HKD/USD)
- Payment Frequency (Annually/Semi-annually/Quarterly/Monthly)
- Death Benefit Option (Increasing/Level)

Enter:

- Desired Contribution (should be $\geq$ HK\$4200 for LifeMaster)
- Desired Sum Insured (should be $\geq$ 2 times of annual contribution)

Check and Enter:

- *Rider-at-Ease (Check and enter a sum insured $\geq$ HK\$200000 if you want to select Rider-at-Ease)
- *Accident Rider (Check and enter a sum insured $\geq$ HK\$200000 if you want to select Accident Rider and then select a class for Accident Rider, "Class 1/Class 2/Class 3")
- *AcciCare Rider (Check and enter a sum insured $\geq$ HK\$200000 if you want to select AcciCare Rider and then select a class for Accident Rider, "Class 1/Class 2/Class 3")
- *Hospital Cash Rider (Check and enter a sum insured $\geq$ HK\$300 if you want to select Hospital Cash Rider)
- Scheduled Investment Contribution (Check and enter a contribution $\geq$ HK\$1200 if you want to have a regular investment)

Check:

- Waiver of Premium Rider (Check if you want to select Waiver of Premium Rider)

Special Function: Lump Sum Investment Contribution

Check if you want to add Lump Sum Investment. After you check, you will see a mini dialog

Single Top-up	
Year	Top-up
(null)	(null)

shows in the right down side like Fig 4.1.3.2.

The screenshot shows the 'Sales Quotation System' interface. The 'New Quotation' form is displayed with the following details:

- Policy Owner:** Same as Policy Owner, Salutation: Mr., Surname: Test, Given Name: Tester, Age: 48, Date of Birth: (dd/mm/yyyy), Smoke: (checkbox).
- Life Insured:** (checkbox), Salutation: Mr., Surname: Test, Given Name: Tester, Age: 48, Date of Birth: (dd/mm/yyyy), Smoke: (checkbox).
- Product:** LifeMaster, TR Name: (text), TR Contact No.: (text).
- Plan Details:** Policy Term: 51, Premium Term: 51, Policy Currency: HKD, Payment Frequency: Annually.
- Desired Contribution:** Contribution: (text), Sum Insured: (text), Death Benefit Option: Increasing.
- Optional Rider:**
 - ☐ Rider-at-Ease, Sum Insured: (text), [CALC]
 - ☐ Accident Rider, Sum Insured: (text), Class: (text), [CALC]
 - ☐ AcciCare Rider, Sum Insured: (text), Class: (text), [CALC]
 - ☐ Hospital Cash Rider, Sum Insured: (text), [CALC]
 - ☐ Critical Illness Lifetime Rider, Sum Insured: (text), [CALC]
 - ☐ Premium Waiver Rider
- Additional Contribution Account:**
 - ☐ Scheduled Contribution (Top-up), Contribution: (text)
 - ☒ Lump Sum Contribution

A 'Single Top-up' dialog box is open in the bottom right corner, showing a table with columns 'Year' and 'Top-up'. The table contains one row with an asterisk (*) in the 'Year' column.

Fig 4.1.3.2

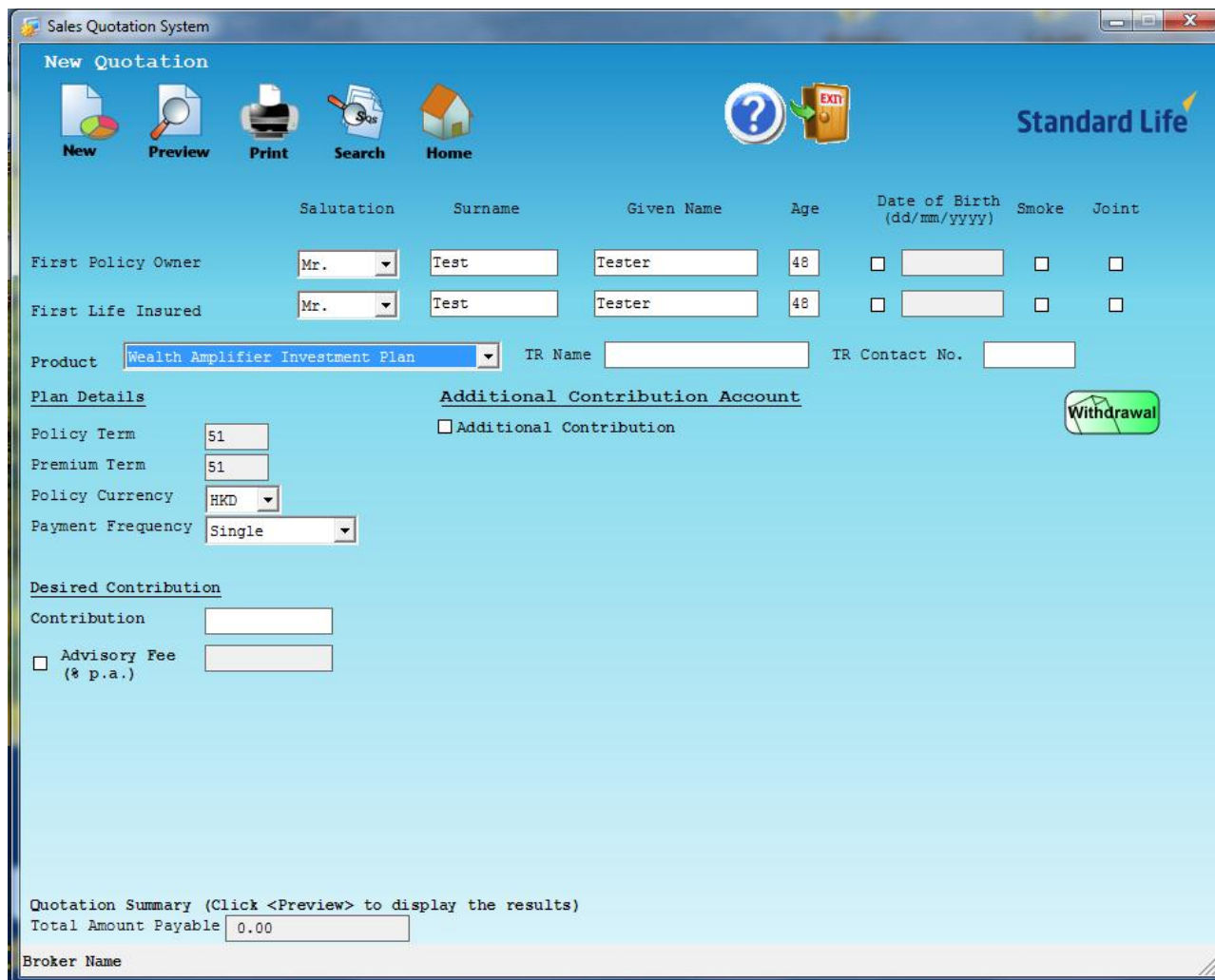
In the Single Top-up dialog, you can enter the number of future year and sum of investment in Top-up that you want to make Lump Sum Investment.

Quotation Summary: It shows the Total Amount Payable per payment frequency.

* Can use calculate function  (Section 4.1.5)

4.1.4 Single Investment Product

Select Single Investment Product from the Product combo box (e.g. Wealth Amplifier Investment Plan), it brings you to the screen Fig.4.1.4.1.



Sales Quotation System

New Quotation

Icons: New, Preview, Print, Search, Home, ? (Help), EXIT

Standard Life

Fields:

- First Policy Owner: Salutation (Mr.), Surname (Test), Given Name (Tester), Age (48), Date of Birth (dd/mm/yyyy), Smoke, Joint
- First Life Insured: Salutation (Mr.), Surname (Test), Given Name (Tester), Age (48), Date of Birth (dd/mm/yyyy), Smoke, Joint
- Product: Wealth Amplifier Investment Plan (dropdown), TR Name, TR Contact No.

Plan Details

- Policy Term: 51
- Premium Term: 51
- Policy Currency: HKD (dropdown)
- Payment Frequency: Single (dropdown)

Additional Contribution Account

- ☐ Additional Contribution

Desired Contribution

- Contribution: [Text Box]
- ☐ Advisory Fee (% p.a.) [Text Box]

Withdrawal (button)

Quotation Summary (Click <Preview> to display the results)

Total Amount Payable: 0.00

Broker Name: [Text Box]

Fig.4.1.4.1 Single Investment Product (Wealth Amplifier Investment Plan)

Plan Details:

Select:

- Policy Currency (HKD only in Wealth Amplifier Investment Plan)
- Payment Frequency (Single only in Wealth Amplifier Investment Plan)

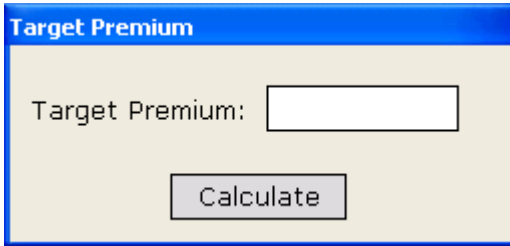
Enter:

- *Desired Contribution (Enter Contribution should be $\geq$ HK\$80000)

Quotation Summary: It shows the Total Amount Payable per payment frequency.

4.1.5 Use of Calculate Function:

User can click icon  to calculate sum insured by entering a premium. After clicked, a window Fig 4.1.5.1 will display. Then user can enter their target premium and the result will be shown in sum insured Textbox.

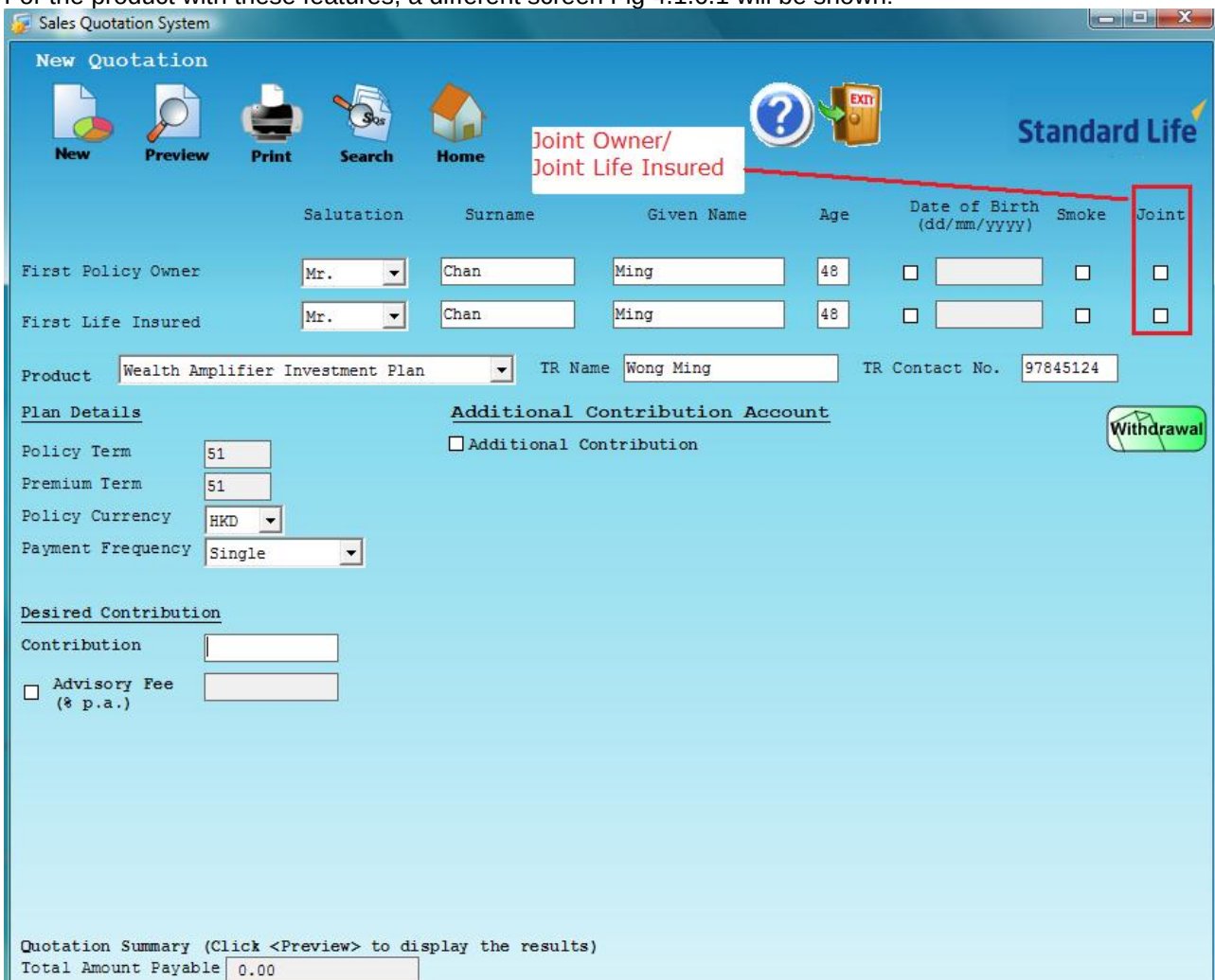


A small dialog box titled "Target Premium" with a blue border. It contains a text input field labeled "Target Premium:" and a "Calculate" button below it.

Fig. 4.1.5.1 Calculate Sum Insured

4.1.6 Joint Owner / Joint Life Insured Function:

SQS allows creating a joint owner / joint life insured quotation for some products. For the product with these features, a different screen Fig 4.1.6.1 will be shown:



The screenshot shows the "Sales Quotation System" window with a "New Quotation" title bar. The interface includes a toolbar with icons for New, Preview, Print, Search, and Home. A red box highlights the "Joint Owner/ Joint Life Insured" label, which is connected by a red line to a "Joint" checkbox in the "First Life Insured" row. The "First Policy Owner" row also has a "Joint" checkbox. The "First Life Insured" row has a "Joint" checkbox. The "Product" dropdown is set to "Wealth Amplifier Investment Plan". The "TR Name" is "Wong Ming" and the "TR Contact No." is "97845124". The "Plan Details" section includes fields for Policy Term (51), Premium Term (51), Policy Currency (HKD), and Payment Frequency (Single). The "Additional Contribution Account" section has a checkbox for "Additional Contribution". The "Desired Contribution" section has a "Contribution" field and an "Advisory Fee (% p.a.)" field. The "Quotation Summary" section shows "Total Amount Payable" as 0.00. A "Withdrawal" button is visible in the bottom right corner.

Fig 4.1.6.1

Checking the joint checkbox, a new row in Fig 4.1.6.2 will be shown for entering the information of second policy owner / second life insured:

Sales Quotation System

New Quotation

New Preview Print Search Home

Standard Life

	Salutation	Surname	Given Name	Age	Date of Birth (dd/mm/yyyy)	Smoke	Joint
First Policy Owner	Mr.	Chan	Ming	48			☒
Second Policy Owner	Miss	Lee	Tai	23			☐
First Life Insured	Mr.	Chan	Ming	48			☒
Second Life Insured	Miss	Lee	Tai	23			☐

Product: Wealth Amplifier Investment Plan TR Name: Wong Ming TR Contact No.: 97845124

Plan Details

Policy Term: 51 Premium Term: 51 Policy Currency: HKD Payment Frequency: Single

Additional Contribution Account

☐ Additional Contribution

Desired Contribution

Contribution: 500000

☐ Advisory Fee (% p.a.)

Quotation Summary (Click <Preview> to display the results)

Total Amount Payable: HKD 500,000.00

Withdrawal

Fig 4.1.6.2

4.1.7 Multi Joint Owner / Multi Joint Life Insured Function:

Other than a single joint owner / joint life insured, SQS also allows to create a multi joint owners / multi joint life insured quotation for certain products (e. g Harvest Wealth).

For the product with these features, a different screen Fig 4.1.7.1 will be shown:

Sales Quotation System

New Quotation

Standard Life

Multi Owners / Multi Life Insured

Salutation Surname Given Name Age Date of Birth (dd/mm/yyyy) Smoke

First Policy Owner Mr. Chan Tai Man 20 Add Owners

First Life Insured Mr. Chan Tai Man 20 Add Life

Product Harvest Wealth Investment Plan TR Name TR Contact No.

Plan Details

Premium Term

Policy Currency HKD

Payment Frequency Annually

Desired Contribution

Contribution

☐ Include Customer Incentive (205%)

Additional Contribution Account

☐ Additional Regular Contribution

☐ Single Contribution

Optional Rider

☐ Life Benefit Rider

Sum Insured

☐ Rider-at-Ease

Sum Insured CALC

☐ Critical Illness Lifetime Rider

Sum Insured CALC

☐ Premium Waiver II Rider

+ Loading

Withdrawal

Quotation Summary (Click <Preview> to display the results)

Total Amount Payable 0.00

Fig 4.1.7.1

Checking the joint checkbox, a new row in Fig 4.1.6.2 will be shown for entering the information of second policy owner / second life insured:

To add additional policy owner, click on the “Add Owners” button (in Red). A new input form in Fig 4.1.7.2 will be shown for entering additional policy owner information. Click “Add” / “Remove” button (in orange) to insert new policy owner information or remove existing policy owner information respectively. Click “OK” to close and save the information or Click “Cancel” to close the form without saving.

The screenshot displays the 'Sales Quotation System' window with a 'New Quotation' form. The form includes fields for Salutation, Surname, Given Name, Age, Date of Birth, and Smoke status for both the First Policy Owner and First Life Insured. The First Policy Owner and First Life Insured fields are currently filled with 'Mr.', 'Chan', 'Tai Man', and '20'. The Date of Birth field is empty. The Smoke status field is also empty. The 'Add Owners' button is highlighted with a red box. Below the form, there are sections for 'Plan Details', 'Additional Contribution Account', 'Optional Rider', and 'Desired Contribution'. The 'Desired Contribution' section includes a checkbox for 'Include Customer Incentive (205%)'. The 'Total Amount Payable' field shows '0.00'. A 'MultiPolicyOwners' dialog box is open, showing a table with columns for Salutation, Surname, Given Name, Age, DOB, and Smoke. The table has six rows for 'First Policy Owner' through 'Sixth Policy Owner'. The 'First Policy Owner' row is filled with 'Mr.', 'Chan', 'Tai Man', and '20'. The 'Remove' button is highlighted with an orange box. The 'Add' buttons for the other rows are also visible. The 'OK' and 'Cancel' buttons are at the bottom of the dialog box.

Fig 4.1.7.2

Similarly, to add additional life Insured, click on the “Add Life” button (in Red). A new input form in Fig 4.1.7.3 will be shown for entering additional life insured information. Click “Add” / “Remove” button (in orange) to insert new life insured information or remove existing life insured information respectively. Click “OK” to close and save the information or Click “Cancel” to close the form without saving.

The screenshot displays the 'Sales Quotation System' interface. The main window is titled 'New Quotation' and features a toolbar with icons for New, Preview, Print, Search, and Home. The 'Standard Life' logo is in the top right corner. The form includes fields for Salutation, Surname, Given Name, Age, Date of Birth (dd/mm/yyyy), and Smoke. The 'First Policy Owner' and 'First Life Insured' sections are filled with 'Mr. Chan Tai Man' and age 20. The 'Product' is 'Harvest Wealth Investment Plan'. The 'Additional Contribution Account' section has checkboxes for 'Additional Regular Contribution' and 'Single Contribution'. The 'Optional Rider' section has a checkbox for 'Life Benefit Rider'. The 'Desired Contribution' section has a checkbox for 'Include Customer Incentive (205%)'. The 'Total Amount Payable' is 0.00. A red box highlights the 'Add Life' button. An orange arrow points from this button to the 'MultiLifeInsured' modal window. The modal window has a table with columns: Salutation, Surname, Given Name, Age, DOB (DD/MM/YYYY), and Smoke. The table lists 'First Life Insured' (Mr. Chan Tai Man, 20), 'Second Life Insured' (Mrs. Wong Mei Mei, 30), and 'Third Life Insured' (Mr. Chan Chan, 10). The 'Remove' button for the 'Second Life Insured' is highlighted in orange. The 'Add' buttons for the 'Fourth', 'Fifth', and 'Sixth' Life Insured are also visible. The modal window has 'OK' and 'Cancel' buttons at the bottom.

	Salutation	Surname	Given Name	Age	DOB (DD/MM/YYYY)	Smoke	
First Life Insured	Mr.	Chan	Tai Man	20			
Second Life Insured	Mrs.	Wong	Mei Mei	30			Remove
Third Life Insured	Mr.	Chan	Chan	10			Remove
Fourth Life Insured							Add
Fifth Life Insured							Add
Sixth Life Insured							Add

Figure 4.1.7.3

4.1.8 Partial Withdrawal Function:

SQS allows creating special quotation, partial withdrawal, for some products.



For the product with this feature, a button will be shown in the right hand side. Clicking this button, a panel will be shown in Fig 4.1.8.1

Sales Quotation System

New Quotation

Icons: New, Preview, Print, Search, Home

Standard Life

	Salutation	Surname	Given Name	Age	Date of Birth (dd/mm/yyyy)	Smoke	Joint
First Policy Owner	Mr.	Chan	Ming	48			☒
Second Policy Owner	Miss	Lee	Tai	23			
First Life Insured	Mr.	Chan	Ming	48			☒
Second Life Insured	Miss	Lee	Tai	23			

Product: Wealth Amplifier Investment Plan | TR Name: Wong Ming | TR Contact No.: 97845124

Plan Details

Policy Term: 76 | Premium Term: 76 | Policy Currency: HKD | Payment Frequency: Single

Desired Contribution

Contribution: 500000 | ☐ Advisory Fee (% p.a.)

Special Quotation

Withdrawal ☐

This special quotation function allows for 1 different scenarios of change, namely:

1. Withdrawal

Partial Withdrawal

Close

Quotation Summary (Click <Preview> to display the results)

Total Amount Payable: HKD 500,000.00

Fig 4.1.8.1

Checking the withdrawal button, a box will be shown for entering the withdrawal year and amount:

Withdrawal		
	Year	Amount
▶	1	150000
*		



Entering the required withdrawal, close the panel by clicking the button .

4.2 Preview Quotation

After creating a new Quotation, this function allows user to preview the illustration document for current quotation.

Preview



Click the preview icon on the Quotation screen. The language selection screen (Fig. 4.2.1) will be popup requesting the language you prefer.

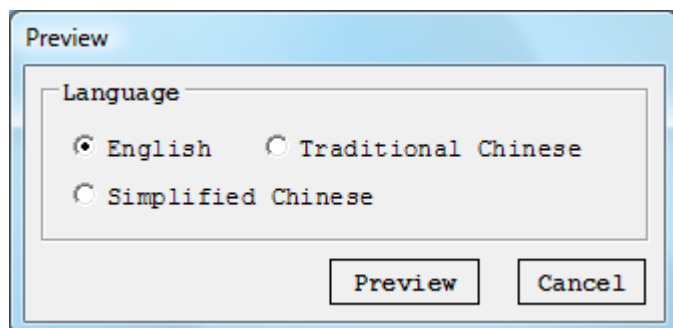


Fig. 4.2.1 Language selection screen

Select <English>, <Traditional Chinese> and click <Preview>. A dialog will be pop up to show the progress of the calculation.

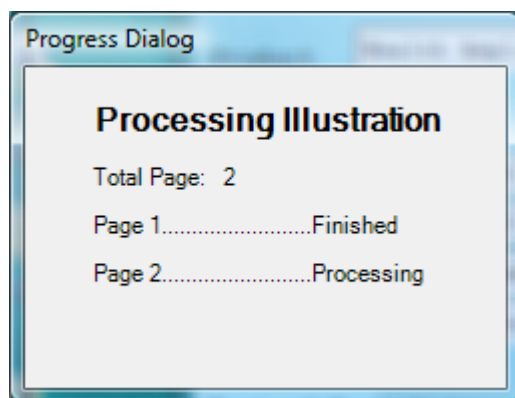


Fig. 4.2.2 Progress Dialog

After the calculation finished, a window (Fig. 4.2.3) will be popup to display the quotation using selected language.



Fig. 4.2.3 Preview window

Zoom

To zoom in and out the document, you can click the magnifier icon  or select the size in the combo box in left down side of the window (Fig. 4.2.4).

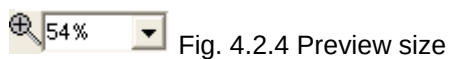


Fig. 4.2.4 Preview size

You can also view the document in different sizes by clicking icon on the bar of right hand side



View different Page

If the document has more than 1 page, click previous page or next page arrow (Fig. 4.2.5) to scroll to previous or next pages.

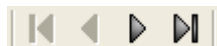


Fig. 4.2.5 Buttons to scroll to previous or next page

Print

Click  to print the quotation directly.

File Save

Click  to save the quotation. User can save it as pdf format only.

Close

Click  to quit the preview window.

4.3 Print Quotation

After creating a new Quotation, user can print the illustration document for current quotation.

You may select printer, number of print copy and language before printing. The printer, number of copies and language will be the same as current user's default setting. Should you wish to change the default value, please refer User Maintenance (section 5) for detail.

Step 1:



Click the Print icon on the Quotation screen.

The language selection screen (Fig. 4.3.1) will be popup requesting the language you prefer.

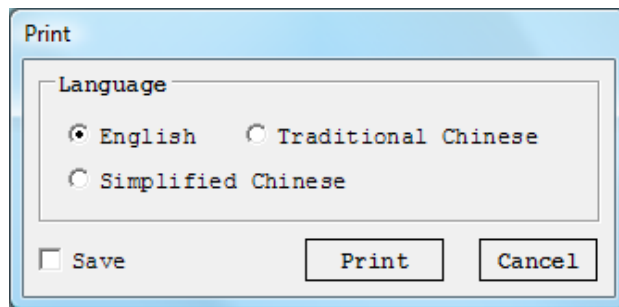
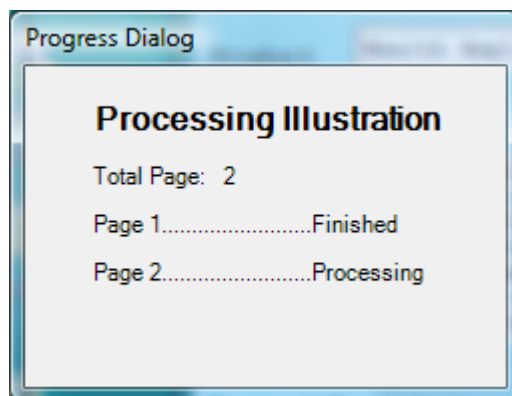


Fig. 4.3.1 Language selection screen

If you want to save the quotation after printing, please check “Save”.

After pressing “Print” button, a dialog will be pop up to show the progress of the calculation.



Then screen Fig.4.3.1 will be prompted up.

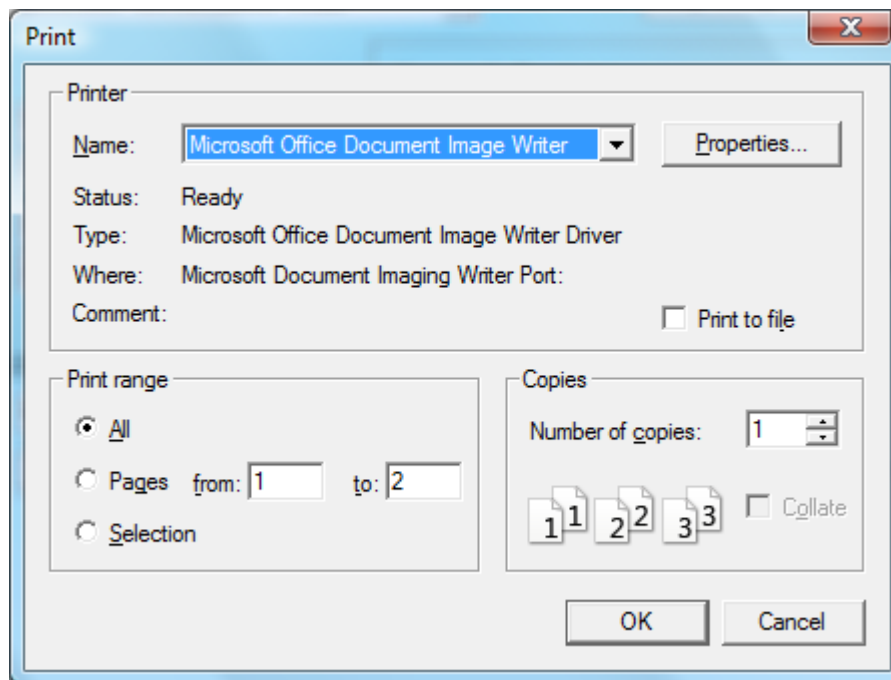


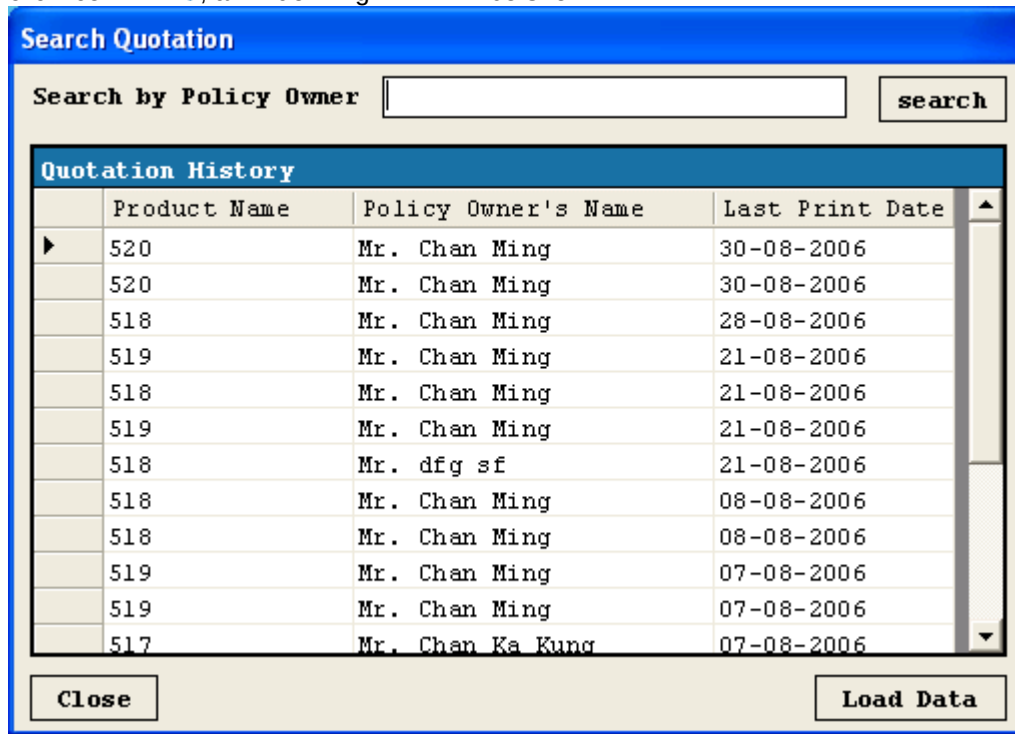
Fig.4.3.1 Print screen

- Step 2: For changing printer, select printers in the combo box.
- Step 3: Enter the desired number of copies in the <Number of Copies> box.
- Step 4: Click <OK> for printing or <Cancel> to stop the action.

4.4 Save the Quotation

SQS will save all the documents that have been printed before. If you want to search the document back,

click icon  , a window Fig.4.4.1 will be shown.



The 'Search Quotation' window features a search bar at the top labeled 'Search by Policy Owner' with a 'search' button. Below this is a table titled 'Quotation History' with columns for 'Product Name', 'Policy Owner's Name', and 'Last Print Date'. The table contains 14 rows of data. At the bottom of the window are 'Close' and 'Load Data' buttons.

	Product Name	Policy Owner's Name	Last Print Date
▶	520	Mr. Chan Ming	30-08-2006
	520	Mr. Chan Ming	30-08-2006
	518	Mr. Chan Ming	28-08-2006
	519	Mr. Chan Ming	21-08-2006
	518	Mr. Chan Ming	21-08-2006
	519	Mr. Chan Ming	21-08-2006
	518	Mr. dfg sf	21-08-2006
	518	Mr. Chan Ming	08-08-2006
	518	Mr. Chan Ming	08-08-2006
	519	Mr. Chan Ming	07-08-2006
	519	Mr. Chan Ming	07-08-2006
	517	Mr. Chan Ka Kung	07-08-2006

Fig 4.4.1 Search Quotation

User can:

- Search Quotation by keyword of Policy Owner.
- Choose a row of data and then click <Load Data> to load the previous quotation.
- Stop searching by close the window

4.5 Return to Main Menu

If you are working on the Quotation screen or User Maintenance screen and want to return to the Main

Menu, click the Main Menu icon  , it brings you back to the Main Menu screen.

5. User Maintenance

This section allows user to maintain user information and default setting for printing quotation.

Fig. 5.1 shows the screen you will see when **User Maintenance**  was clicked on the Main Menu screen.

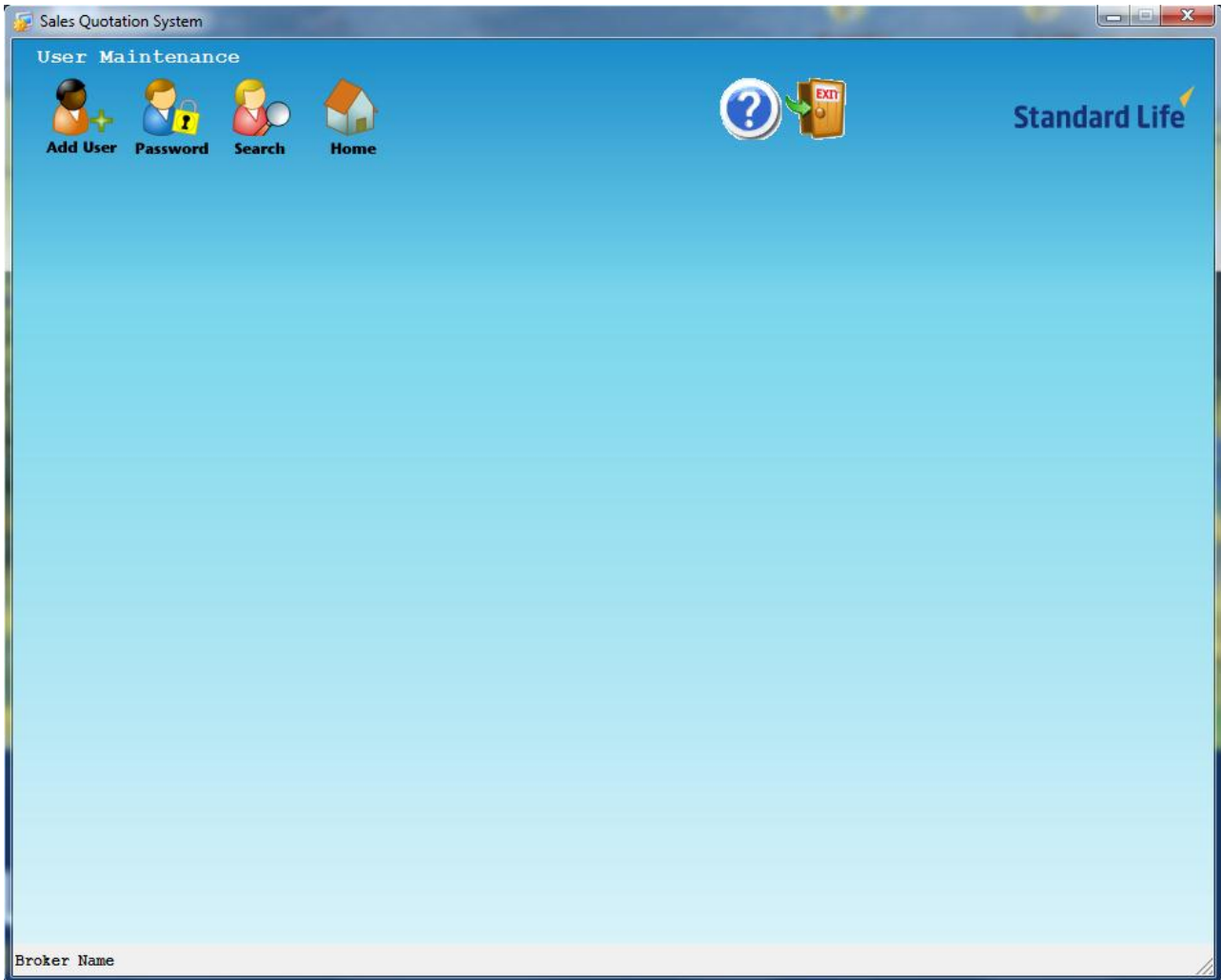


Fig. 5.1 Screen for User Maintenance

On the User Maintenance screen, user can:

- Create New User (section 5.1)
- Search & Update User Details (section 5.1)
- Change Password (section 5.2)

5.1 Create New User

Every user must be registered in order to use the Sales Quotation System. The screen (Fig 5.1.1) will be displayed when you add or change user details.

Step 1: **Create New User Details**

Click the icon  on the User Maintenance screen, it brings you to the screen Fig.5.1.1.

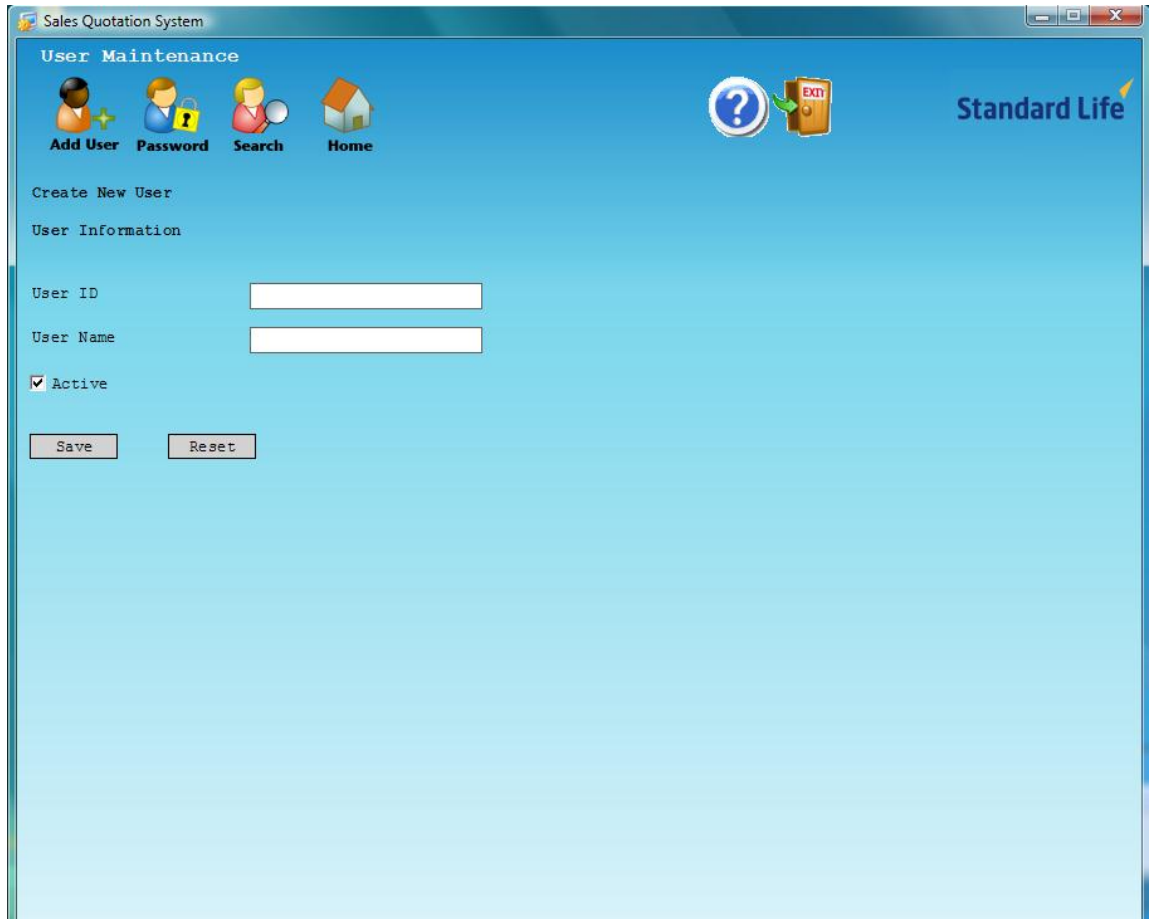


Fig.5.1.1 Create new user screen

Step 2: Enter New User details.

Step 3: Whenever registering a new user, the active role is always ticked. However, should you wish to inactivate the user account, you can de-select it.
If you want to clear the user information that you entered, click <Reset>.

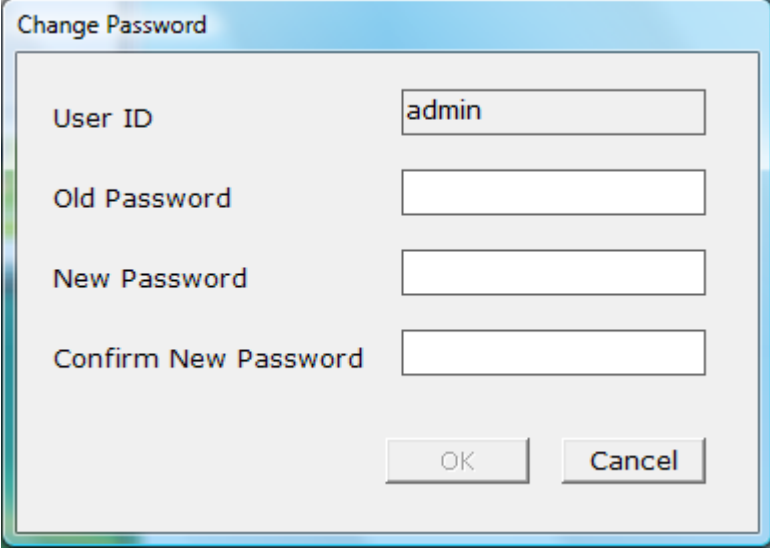
Step 4: Click <Save> for saving record.

5.2 Change Password

For security purpose, you are requested to change a new password at the first time you login in the SQS system. You may also change password anytime you wish.

Step 1:

Click the Password icon  on the User Maintenance screen; the screen Fig.5.2.1 will be popup.



The image shows a 'Change Password' dialog box with a light blue title bar. Inside, there are four text input fields arranged vertically. The first field is labeled 'User ID' and contains the text 'admin'. The second field is labeled 'Old Password'. The third field is labeled 'New Password'. The fourth field is labeled 'Confirm New Password'. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

Fig.5.2.1 Change password screen

Step 2: Enter Old Password. If this is the first time you login, you should enter your User name (*NOT User ID).

If you are changing into a new password, enter your existing password.

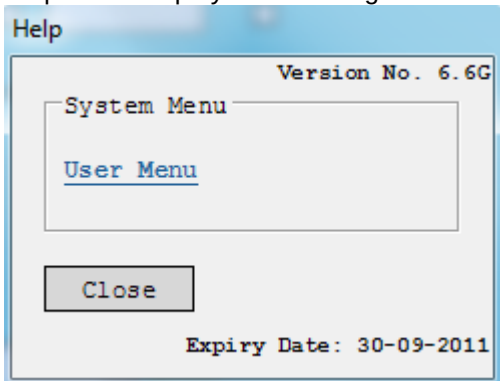
Step 3: Enter New Password twice. The new password must be different from the existing password.

Step 4: Click <OK> to confirm or <Cancel> to stop the action.

6. Help Menu



Help menu display the following information: Version No. and Expiry Date.



Section 1: System Menu

When you click User Menu link, it will open the SQS user menu PDF file for you in Acrobat Reader program.

7. Exit



When you finish using SQS program, you can click Exit icon to close the application.