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Configuration

Before you Start

bais is a fully accredited Sunrise application and uses the functionality available in the Internet Explorer browser.

We have found some insurance products that do not fully comply with the browser environment and it is necessary to change a setting in your browser to ensure that all products behave in an acceptable manner.

To make the changes, please do the following:

In Internet Explorer, click on TOOLS, then INTERNET OPTIONS.

You will be presented with the following form:

Internet Options					? 🗙							
General Security	Privacy	Content	Connections	Programs	Advanced							
Settings												
To use the slider to set privacy level instead of using custom settings, click the Default button.												
Cus	Custom											
- Ad	vanced or	r imported	settings									
Sites		nport	Advanced.	. Def	ault							
Bee us Blacker												
Pop-up Blocker	t most pop	o-up windo	ws from appear	ring.								
Bloc	:k pop-up:	s		Setti	ngs							
					Applu							
				ncer	Арріу							

Click on **PRIVACY** to bring up the following form:

Then complete the form as outlined below.

Advanced Privacy Settings	? 🛛
You can choose how zone. This overrides	w cookies are handled in the Internet s automatic cookie handling.
Cookies	
☑ Override automatic cookie	handling
First-party Cookies	Third-party Cookies
 Accept 	 Accept
O Block	O Block
O Prompt	O Prompt
Always allow session c	ookies
	OK Cancel

OK the form and OK again to accept the changes.

Sunrise Processing

This manual covers the use of Sunrise products within bais.

This manual assumes a basic understanding of **processing** in **bais** and should be read in conjunction with the **Introductory Manual**.

Processing a Sunrise Quote

To access the **quote function**, you can either choose **Client Quotation** from the drop down list if there is no client yet on the system:

Home	Account Selection	Change Password	All Options	Favourites	Logout	
Client Proce	essing					
Client Code Client Details Insured Name and Insured Na	s Search]		Memo No Policy Details Insured Name Invoice No	5 Search	
<u>Client Search</u>				or Policy No or Risk Descrip Version <u>Policy Search</u>	current	
New Client A	ctions: Select Select Add New Insurer C Client Q Placing S	Client Quotation Jotation		1		

Or you can select **Client Quotation** from the **Client Processing** screen for existing clients so that their details are automatically populated into the quote where possible:

sing											-	
												Clear
(GOTCHA	Gotcha Priv	vate Investigations				Actio	ns: 🛄	Select Action	~ -	-Transaction	Entry
Priva Sydr	ite Bag 00 ney NSW 1	07 2000		Contact Pers Telephone	son	Gary 02 99	Gotch 99 1111	1	Retail/Wholesa		Transaction surer Quota lient Quotatio lacing Slip	Entry tion on
				Business Pho Mobile Phon	one e	02 99 0400	99 3333 111 222		Association Email	gary N	over Note ew Policy	5
2000	10			Fax No		02 99	99 1122		Executive	Sheraly	ee Only Debr n Andrews	t
		TY Net Profit		Unallocated			Cu	irrent		Balance	2	
		LY Net Profit		30 Days			60	Days		90+ Da	iys	0.00
ired P	olicies	Click '>>	cell to view policy l	history					Click any high	nlighted c	ell to view de	tails
Туре	Class	Risk Description	Policy Number	U/W	St	Start	End	Invoic	e Client Orig	Client O/ Amt	S Creditor Oria Amt	Credito
	Priva Sydr 2000 iired P Type	GOTCHA Private Bag 00 Sydney NSW 2 2000 ired Policies Type Class	GOTCHA Gotcha Priv Private Bag 007 Sydney NSW 2000 2000 TY Net Profit LY Net Profit ired Policies Click '>> Type Class Risk Description	GOTCHA Gotcha Private Investigations Private Bag 007 Sydney NSW 2000 2000 TY Net Profit LY Net Profit irred Policies Click '>>' cell to view policy I Type Class Risk Description Policy Number	Image: Corteral Private Investigations Private Bag 007 Sydney NSW 2000 Contact Personal Private Investigations 2000 Telephone Business Phi Mobile Phone Fax No 2000 Fax No TY Net Profit LY Net Profit Unallocated 30 Days irred Policies Click '>>' cell to view policy history Type Class Risk Description	Image: Corteal Private Investigations Private Bag 007 Sydney NSW 2000 Contact Person Telephone Business Phone Mobile Phone Fax No 2000 TY Net Profit LY Net Profit Unallocated 30 Days ired Policies Click '>>' cell to view policy history Type Class Risk Description Policy Number U/W St	COTCHA Cottcha Private Investigations Private Bag 007 Sydney NSW 2000 Contact Person Gary Telephone 02 99 Business Phone 02 99 Mobile Phone 2000 TY Net Profit LY Net Profit Unallocated 30 Days ired Policies Click '>>' cell to view policy history Type Class Risk Description	CortCHA Cotcha Private Investigations Action Private Bag 007 Sydney NSW 2000 Contact Person Telephone Gary Gotch 02 9999 1111 Business Phone 02 9999 3333 04001 11 222 2000 Fax No 02 9999 1122 TY Net Profit LY Net Profit Unallocated 30 Days Cut 60 ired Policies Click '>>' cell to view policy history St Start End	COTCHA Gotcha Private Investigations Actions:	COTCHA Gotcha Private Investigations Actions: Select Action Private Bag 007 Sydney NSW 2000 Contact Person Telephone Gary Gotch 02 9999 1111 Retail/Wholesal Association 2000 Mobile Phone 0400 111 222 Email 2000 Fax No 02 9999 1122 Executive TY Net Profit LY Net Profit Unallocated 30 Days Current 60 Days irred Policies Click '>>' cell to view policy history Click any high mt Type Class Risk Description Policy Number U/W St Start End Invoice Client Orig Amt	GOTCHA Gotcha Private Investigations Actions: Select Action V Private Bag 007 Sydney NSW 2000 Contact Person Telephone Gary Gotch 02 9999 1111 Retail/Wholesale Retail/Wholesale N 2000 Mobile Phone 0400 111 222 Email gary Retail/Wholesale N 2000 Fax No 02 9999 1122 Executive Sheri Sheri TY Net Profit LY Net Profit Unallocated 30 Days Current 60 Days Balance ired Policies Click '>>' cell to view policy history Click any highlighted color Type Class Risk Description Policy Number U/W St Start End Invoice Amt	COTCHA Cotcha Private Investigations Actions: Select Action Sel

You are required to select the **Policy Class** for the quote

Home	Account Selectio	on Change	Password	All Options	Favourites	Logout			
Policy Trans	NEW	Gotcha Priva	INSTRV	Travel (Sunrise)		Transaction	QUC	Quote to Client	Previous
		Renewal Typ				Status	Q	Quote	

and then **click Accept** to begin processing.

Policy Trans	saction				Organiseit	Submit	Print Preview	Suspend	Previous
Merno No	NEW Clas Ren	<u>s</u> ewal Type	INSTRV	Travel (Sunrise) Annual Renewable		Transaction Status	QUC Quo Q Quo	te to Client te	
Insured Deta	iils	🌒 Go	tcha Priva	te Investigations					
<u>Insured</u> Insured Name	GOTCHA Gotcha Private Inves	Go tigations	tcha Priva	te Investigations	Business	Private Inve	estigations		*
Address	Private Bag 007 Sydney NSW 2000	0		× 	<u>Executive</u> <u>Alternate Ex</u>		Sheralyn A	ndrews	×
<u>Division</u> <u>Debtor</u> <u>Policy Start</u> <u>Effective Start</u>	COM Cor GOTCHA Got 01/01/07 01/01/07	nmercial cha Private <u>Po</u> <u>Eff</u>	Investigat licy End ective End	ions 01/01/08	<u>Co. Branch</u> <u>Currency</u> End Text Entry Date	0 AUD At 4pm Loc. 11/12/2007	B A Insurai <u>Currency(S</u> al Time Entered By	nce Systems Pty Sum Insured) chac	
Insurer Deta Insurer (Sunris Insurance Lim Sunrise	ils se) hited T	In:	surance Lir	nited Policy No To Be Advised Sunrise Risk De	escription	Coinsurance Sunrise Statu:	s N		
Risk Letails a	and Premiums	•							
When completed Start and and any o informatio selected more available) Sunrise launch Su	you have d the Policy d End Dates other required on, and the Insurer (if than one , Click on the button to unrise.		If the is a usua repla (Sun here The show code prod	e policy class a Sunrise cla al Insurer se aced with the prise) section a drop dowr ws only the es linked to the luct selected.	selected ass, the ection is a Insurer as shown n menu Insurer e Sunrise		Data searcha up a po	input able wher licy.	here is 1 looking

A **Sunrise browser screen** will appear with the relevant Insurer product displayed (similar to the example shown below). The screens will vary depending on the product chosen and this manual does not cover use of, or navigation within the Insurer product screens. Please contact the Insurer for more information or training on any particular Insurer product.

		Quote
A	Client Id:	GOTCHA
como hraval	Client Name:	Gotcha Private Investigations
acmetraver	Client Address:	Private Bag 007
		Svdnev NSW 2000
	Post Code:	2000
	Client Details Insured	Details Insurer Details Intermediary Details
	Journey Start Date:	01 Jan 2007
	Journey End Date:	01 Jan 2008
	Number of Travellers:	Two
	Travelling to:	Europe/Asia Pacific 🛛 👻
	Type of Cover:	Super 💌
	Fees and charges	Commision
	Premium: \$	127.00 Commission: \$ 2.54
	Tax: \$	12.70 Tax on Commission: \$ 0.25
	Duty: \$	0.64
	Agent Fee:	Complete the Insurer Product screens and
	Tax on Agent Fee:	navigate back to bois.
	Total Payable: 🗸	101.01
	Test Options	
	Quote Valid Days:	Retain Policy No: 🔽
	Closing Mode:	Auto 💌 Renewal Data: 🗖
		Extra Info CalcPremium Finish Cancel
	-	
	Sunrise Travel Product Re	lease 7 - trvbuild_00011 #0

When you **click** the **Finish** (or equivalent) button in the Insurer's product, the Sunrise screen will close and you will be returned to the **bais** screen as shown below.

	Account Solos	tion Chan	an Daga	word All Ontic		Envoyeitar	Locout				
n	Account selec	.uon Cnan	ye Passi	word An Optic		ravounces	Logout				
Policy Trans	saction						Submit	Print Preview	Suspend	Pre	vious
Memo No	NEW	Class	I	NSTRV Travel (Sunrise)		Transaction		te to Client		
		Renewal T	ype A	Annual Annual	Renewable		Status	Q Quo	te		
Insured Deta	vils	4	Gote	ha Private Invest	idations						
Insured Detu	1113	-	oote	is more most	igaciona						
Insured	GOTCHA		Gotch	ha Private Invest	igations		12				
Insured Name	Gotcha Private	e Investigatio	ns		12	Business	Drivete Ter				
						•					
				When y	ou retu	rn to b	ais the fi	gures and	I details	s 📃 📖	
Address	Private Bag 00	07	_	entered	into the	Insurer pr	oduct scre	ens will be	brough	t	
	Sydney NSW	2000			•						
				back int	o bais						
Division	COM	Commerc	ial							td	
Debtor	COM	Gotcha Pr	ivate Ir								
<u></u>	GOTCHA			You can	add a S	ub Agent	if required.			AUD	
Policy Start	01/01/2007		Polic								
Effective Start	01/01/2007		Effec	Add you	r Brokei	''s Fee if r	equired (if	not already	enterec	1	
Incurse Del	ile		Terry	in the In	surer's p	product).					
insurer Detai	IIS	•	Insu							_	
Insurer (Sunris	se)			When ye	ou have	confirme	d all the P	remium de	tails are)	
Insurance Lim	nited 💌					Submit					
Suprise				correct of	CIICK 📖	a sa string					
Subagent Det	tails										
Policy Specifi	ic Details										
	1.0										
1 GEN	0.0000	State Area	Sunrise	otion			Base Premium 127.00	FSL 0.00	GST Sta 12.70	mp Duty 0.64	140.3
1 GEN	0.0000	NSW M	Descrip	ntion			Base Premium 127.00	FSL 0.00	GST Sta 12.70	mp Duty 0.64	140.3
1 GEN	0.0000	NSW M	Client	tron t Payable	151.34	4	Base Premium 127.00	FSL 0.00 Acti	GST Sta 12.70	mp Duty 0.64 Select	140.3
1 GEN Premium Sum Annual Premi	nmary	NSW M	Client	t Payable	151.34	t Transacti	Base Premium 127.00	FSL 0.00 Acti	GST Sta 12.70 ons:	Select	140.3
1 GEN Premium Sum Annual Premi Premium	nmary ium	127.00	Client	t Payable	151.34	t Transactio	Base Premium 127.00 on Premium 127.00	FSL 0.00 Acti	GST Sta 12.70	Select	140.3
1 GEN Premium Sum Annual Premi Premium FSL	nmary ium	127.00 0.00	Client	t Payable	151.34	t Transacti	Base Premium 127.00 on Premium 127.00 0.00	FSL 0.00 Acti	GST Sta 12.70	Select	140.3
I GEN Premium Sum Annual Premi Premium FSL Stamp Duty	nmary ium	127.00 0.6-	Client	t Payable	151.34	t Transacti	Base Premium 127.00 on Premium 127.00 0.00 0.64	FSL 0.00 Acti	GST Sta 12.70	Select	140.3
I GEN Premium Sum Premium Premium FSL Stamp Duty Brokers Fee	nmary	127.00 0.06 10.000	Client	t Payable	151.34	t Transacti	Base Premium 127.00 on Premium 127.00 0.00 0.64 10.00	FSL 0.00 Acti	GST Sta 12.70	Select	140.3
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GEN	nmary ium	127.00 0.06 10.00 1.00	Client	t Payable	151.34	4 Transaction %	Base Premium 127.00 on Premium 127.00 0.00 0.64 10.00 1.00	FSL 0.00 Acti	GST Sta 12.70	Select	140.3
GEN G	nmary ium Brokerage	Lizze Area NSW M 127.01 0.01 0.06 10.00	Client	t Payable	151.34	4 Transaction %	Base Premium 127.00 on Premium 127.00 0.00 0.64 10.00 1.00	FSL 0.00 Acti	GST Sta 12.70	Select	140.3
GEN G	nmary ium Brokerage Brokerage GST	Lizze Area NSW M 127.00 0.00 0.66 10.00 1.000	Client	t Payable	151.34	4 Transaction %	Base Premium 127.00 0.00 0.64 10.00 1.00 0.00 0.00 0.00	FSL 0.00 Acti	GST Sta 12.70	Select	140.3
GEN	nmary ium Brokerage GST	Lizze Area NSW M 127.00 0.01 0.66 10.00 1.000 0.01 1.000	Client	t Payable	151.34	4 Transacti %	Base Premium 127.00 on Premium 127.00 0.00 0.64 10.00 1.00 0.00 0.00 0.00 12.70	FSL 0.00 Acti	GST Sta 12.70	Select	140.3
GEN	nmary ium Brokerage GST	127.00 0.00 10.00 0.01 0.00 1.000	Clientise Clientise	t Payable	151.34	4 Transaction %	Base Premium 127.00 on Premium 127.00 0.64 10.00 0.64 10.00 1.00 0.00 12.70	FSL 0.00 Acti	GST Sta 12.70	Select	140.3
GEN G	nmary ium %% Brokerage GST	State Area NSW M 127.00 0.00 0.00 10.00 10.00 10.00 12.70 0.00 12.70 0.00 12.70 0.00	Client	t Payable	151.34	4 Transaction %	Base Premium 127.00 on Premium 127.00 0.00 0.64 10.00 1.00 0.00 0.00 12.70 0.00	FSL 0.00 Acti	GST Sta 12.70	Select	140.3
GEN G	nmary ium %% Brokerage GST	127.00 0.00 0.00 0.00 10.00 12.70 0.00 12.70 0.00 151.3 ²	Client	t Payable	151.34	4 Transacti %	Base Premium 127.00 on Premium 127.00 0.00 0.64 10.00 1.00 0.00 12.70 0.00 151.34	FSL 0.00 Acti	GST Sta 12.70	Select	140.3
Premium Sum Annual Premi Premium FSL Stamp Duty Brokers Fee Rebate Fee GST Non Refunded f Non Refunded f Other Charges Premium GST Premium GST Premium GST Policy Fee Policy Fee Policy Fee	nmary ium % Brokerage Brokerage GST ke age	127.00 0.00 0.00 0.00 10.00 10.00 12.70 0.00 12.70 0.00 151.34	Client Client 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	t Payable	151.34	4 Transaction %	Base Premium 127.00 0.00 0.64 0.00 0.00 1.00 0.00 12.70 0.00 151.34	FSL 0.00 Acti	GST Sta 12.70	Select	140.3
Premium Sum Annual Premi Premium FSL Stamp Duty Brokers Fee Rebate Fee GST Non Refunded f Non Refunded f Other Charges Premium GST Premium GST Policy Fee Policy Fee Brokerage	nmary ium Brokerage Brokerage GST le age 2.0000 %	Lizze Area NSW M 127.00 0.00 0.06 10.00 10.00 12.70 0.00 12.70 0.00 151.34	Client Cl	t Payable	2.0000	4 Transaction %	Base Premium 127.00 on Premium 127.00 0.00 0.64 1.00 1.00 0.00 0.00 12.70 0.00 151.34 2.54	FSL 0.00	GST Sta 12.70	Select	140.3
Premium Sum Annual Premi Premium FSL Stamp Duty Brokers Fee Rebate Fee GST Non Refunded f Non Refunded f Other Charges Premium GST Premium GST Client Payable Refund Brokerage Brokerage GST	nmary ium Brokerage Brokerage GST le age 2.0000 %	127.00 0.00 0.60 10.00 10.00 1.00 12.70 0.00 12.70 0.00 151.34	Client Cl	t Payable	2.0000	4 Transaction %	Base Premium 127.00 on Premium 127.00 0.00 0.64 10.00 10.00 10.00 12.70 0.00 12.70 0.00 151.34 2.54 0.25	FSL 0.00	GST Sta 12.70	Select	140.3
Premium Sum Annual Premi Premium FSL Stamp Duty Brokers Fee Rebate Fee Rebate Fee Rebate Fee Rebate Fee ST Non Refunded B Other Charges Premium GST Policy Fee Solicy Fee Solicy Fee Brokerage Brokerage GST FBC	nmary ium Brokerage Brokerage GST le age 2.0000 %	Lizze Area NSW M 127.00 0.00 0.60 10.00 10.00 10.00 12.70 0.00 151.34 2.55 0.22 0.00	Client Cl	t Payable	2.0000	4 Transaction %	Base Premium 127.00 0.00 0.64 10.00 0.64 1.00 0.00 0.00 12.70 0.00 151.34 2.54 0.25 0.00	FSL 0.00	GST Sta 12.70	Select	140.3
GEN G	nmary ium Brokerage Brokerage GST le age 2.0000 %	127.00 0.00 0.00 0.00 0.00 10.00 0.00 12.70 0.00 151.34 0.00 151.34	Client	t Payable	2.0000	t Transaction %	Base Premium 127.00 on Premium 127.00 0.00 0.64 10.00 1.00 0.00 12.70 0.00 12.70 0.00 151.34 2.54 0.25 0.00 0.00 0.00	FSL 0.00	GST Sta 12.70	Select	140.3
GEN G	nmary ium Brokerage Brokerage GST Be age 2.0000 %	Lizte Area NSW M 127.00 0.00 0.60 10.00 0.60 10.00 10.00 10.00 10.00 0.60 10.00 10.00 0.60 10.00 10.00 0.00 12.70 0.00 0.00 12.70 0.00 0.00 12.70 0.0	Client	t Payable	2.0000	4 Transaction %	Base Premium 127.00 on Premium 127.00 0.00 0.64 1.00 1.00 0.00 12.70 0.00 12.70 0.00 151.34 2.54 0.25 0.00 0.00 137.55	FSL 0.00	GST Sta 12.70	Select	140.3
GEN G	nmary ium Brokerage Brokerage Brokerage Comparison Mentioned	Lizte Area NSW M 127.00 0.00 0.00 10.00	Client	t Payable	2.0000	t Transaction %	Base Premium 127.00 on Premium 127.00 0.00 0.64 10.00 1.00 0.00 12.70 0.00 12.70 0.00 151.34 2.54 0.25 0.00 137.55 0.00 0.00	FSL 0.00	GST Sta 12.70	Select	140.3
GEN G	nmary ium Brokerage Brokerage GST Brokerage GST Le age 2.0000 % r	Lizte Area NSW M 127.00 0.00 0.00 10.00	Client	t Payable	2.0000	t Transaction %	Base Premium 127.00 on Premium 127.00 0.00 0.64 10.00 1.00 0.00 12.70 0.00 12.70 0.00 151.34 2.54 0.25 0.00 0.00 137.55 0.00 0.00 137.55	FSL 0.00	GST Sta 12.70	Select	140.3
GEN G	nmary ium % Brokerage Brokerage GST ke age 2.0000 % T mission je	Lizte Area NSW M 127.00 0.00 0.00 10.00 10.00 10.00 12.77 0.00 151.34 2.55 0.22 0.00 0.00 137.55 0.00 0.00 12.54	Client	t Payable	2.0000	4 Transaction %	Base Premium 127.00 on Premium 127.00 0.00 0.64 10.00 0.64 10.00 0.64 10.00 0.00 12.70 0.00 151.34 2.54 0.25 0.00 137.55 0.00 0.00 137.55 0.00 0.00 12.54	FSL 0.00	GST Sta 12.70	Select	140.3
Premium Sum Annual Premi Premium FSL Stamp Duty Brokers Fee Rebate Fee GST Non Refunded E Non Refunded E Non Refunded E Other Charges Premium GST Policy Fee Policy Fee GST Client Payable Refund Brokerage Brokerage Brokerage GST FBC Witholding Tax Due to Insurer Subagent Com Subagent Com	nmary ium Brokerage Brokerage Brokerage C Brokerage C C C C C C C C C C C C C C C C C C C	Lizze Area NSW M 127.00 0.00 0.66 10.00 1.	Client Cl	t Payable	151.34 	4 Transaction %	Base Premium 127.00 on Premium 127.00 0.00 0.64 10.00 0.00 1.00 0.00 12.70 0.00 151.34 2.54 0.25 0.00 137.55 0.00 0.00 12.54	FSL 0.00	GST Sta 12.70	Select	140.3
Premium Sum Annual Premi Premium FSL Stamp Duty Brokers Fee Rebate Fee GST Non Refunded t Other Charges Premium GST Policy Fee Policy Fee GST Client Payabl Refund Brokerage Brokerage Brokerage GST FBC Witholding Tax <u>Due to Insurer</u> Subagent Com Subagent GST Net Brokerag	nmary ium Brokerage Brokerage Brokerage GST Brokerage GST Le age 2.0000 % r mission ge uses and Note: ents	Lizze Area NSW M 127.00 0.00 0.06 10.00 10.00 12.77 0.00 12.77 0.00 151.34 0.00 151.34 0.00 0.00 151.34 0.00 0.00 151.34 0.00 0.00 151.34 0.00 0.00 151.34 0.00 0.00 151.34 0.00 0.00 151.34 0.00 0.00 151.34 0.00 0.00 0.00 151.34 0.00 0.00 0.00 151.34 0.00 0.00 0.00 151.34 0.00 0.00 0.00 151.34 0.00 0.00 0.00 0.00 151.34 0.00 0.00 0.00 151.34 0.00 0.00 0.00 151.34 0.00 0.00 0.00 151.34 0.00 0	Client Client D D D D D D D D D D D D D D D D D D D	t Payable ers Standard Wo	151.34	t Transaction %	Base Premium 127.00 on Premium 127.00 0.00 0.64 10.00 1.00 0.00 1.00 1.00 0.00 12.70 0.00 151.34 2.54 0.25 0.00 0.00 137.55 0.00 0.00 12.54 2.54 0.00 0.00 12.54 0.00 0.00 12.54 0.00 0.0	FSL 0.00	GST Sta 12.70	Select	140.3

You are offered the option to **print** or **email** the documents, using the drop down box and the Print button, or **preview** the documents using the Preview button.

Print Or Preview Policy Doc	cument		
Document To Print Or View	Policy Documents 💌	Action	Print 💌
Print Preview	Cancel		Email

Lastly, a memorandum number is issued:

VBScrip	t: DesignBAIS 🛛 🛛 🔀
Ų.	New Memorandum Number is : 07010037
	ОК

Editing a Sunrise Quotation/Converting a Quote to New Policy

Once a quote has been entered and saved as described above, you can return to it to **edit** it or **convert to New Policy**. From the Client Processing screen (if the quote was attached to an existing client) select from the drop down menu:

Active and	Exp	ired P	olicies	Click '>>'	cell to view policy hi	istory				C	Click any high	nlighted cell t	to view deta	ails
Memo No	>	Туре	Class	Risk Description	Policy Number	U/W	St	Start	End	Invoice	Client Orig Amt	Client O/S Amt	Creditor Orig Amt	Creditor O/S Amt
07010037*0	2 >>	Quc	INSTRV	Sunrise	To Be Advised	INSURER	Q	01/01/07	01/01/08		0.00	0.00	0.00	0.00
Transactio	n Su	mmar	y:	🔺 Memo No	o: 07010037*Q				Action	s: Se	ect Enquiry -	🔽 🛛 Tr	ansaction E	ntry 💌
Transaction	n Su 1	mmar 0/01/0	y: 7	💧 Memo No	o: 07010037*Q	Premiu	m		Action	s: Sel	ect Enquiry -	🔽 Tr Edit	ansaction E ansaction E Client Quot	ntry 👻 ntry ation

If there was no client on the original quote, you can retrieve it by inputting the **memo number** followed by ***Q**, then click on **Policy Search**, or **inputting the Insured Name** then click on **Policy Search**.

Home Account Selection	Change Password All Options Favourites Logout
Client Processing	
Client Code	Memo No 07010038*Q
Client Details Search	Policy Details Search
Insured Name	Insured Name
	involce No or Policy No or Risk Description Version Current ▼ Policy Search
Policy – to edit the without converting - select No.	Vew quote simply VBScript: DesignBAIS Do you wish to convert this quote to a new policy?

When you are returned to the **Policy Transaction** screen, you **must** click on the **Sunrise** button to invoke the Insurer product screens and complete the amendment or conversion to New Policy.

If converting to New Policy, you will also need to update the **Statistical Code** and other details in the **Invoice Particulars section** of **bais**.

Endorsements and Cancellations

When you need to **endorse** or **cancel** a Sunrise policy, go the **Client Processing** screen for the relevant client and locate and highlight the policy to be endorsed or cancelled. Use the **Transaction Entry** drop down menu to select the transaction type you require. We are using Cancellation in this example.

Client Proc	essing											L	Clear
<u>Client Code</u>		ANTZ	🔜 🍐 Antz Pantz (Clothing Co				Acti	ons:	Select Action	💌	Transactio	n Entry
Address	PO	Box 1234	5		Contact Pe	erso	n Dan	ny Boyd					
	Nor	th Sydney	NSW 2067		Telephone 02 9999			999 0000	i	Retail/Wholes	ale RETAIL		
					Business Phone 02 3299			299 0032	E	Association	ABC Tr	ading Group	р
					Mobile Pho	ne	041	2 333 555		Email	antz@a	ntzpantz.co	m
Post Code	2060				Fax No		02 9	999 0111	0	Executive	Sheraly	n Andrews	
TY Gross		64,479	.23 TY Net Profit	7,262.50	Unallocate	d	-420	00.00	Current	0.00	Balance		22987.24
LY Gross			LY Net Profit		30 Days			0.00 6	0 Days	0.00	90+ Da	ys :	29087.24
Memo No	> Type	Class	Risk Description	Policy Number	U/W	St	Start	End	Invoice	Client Orig Amt	Client O/S Amt	Creditor Orig Amt	Creditor O/S Amt
06120054	>> End	AUHH	Sunrise (CLS)	H 901341	CGU	A	18/12/06	12/12/07	120964	0.00	0.00	0.00	0.00
06120045*Q	Quc	INSACC	Sunrise	To Be Advised	ROYAL	Q	11/12/06	11/12/07	1	0.00	0.00	0.00	0.00
06100050	Pol	PMV	Unknown	To Be Advised	AIG	A	01/10/06	01/10/07	120761	2310.00	2310.00	2079.00	2079.00
06090036	End	AUHH	Sunrise (CLS)	H 901217	CGU	A	05/02/07	28/09/07	I21122	65.69	65.69	55.06	55.06
06090021	End	COM	Comm Pack - Fire	0068B0005002	INSURETHAT	A	05/09/06	05/09/07	120669	8857.21	8857.21	7423.36	7423.36
06090010	End	нн	Bldg DE - 1 MAIN ST	GPR000591	ROYAL	A	01/09/06	01/09/07	120672	11.00	11.00	0.00	0.00
06090009	Pol	нн	Bidg DE - 1 MAIN ST	To Be Advised	CGU	A	01/09/06	01/09/07	120653	1287.00	1287.00	1067.00	1067.00
05080048	POI	нн	Bidg AD -	To Be Advised	мамва	A	29/08/06	29/08/07	120533	4823.74	4823.74	3815.59	3815.59
Transaction	Summa	ry:	🔺 Memo No	: 06120054				Acti	ons:	Select Enquir	y 💙 🗔	Transactio	n Entry
Tran Date	12/12/	06			Premiu	m			0.00			Transaction	Entry
Class	Austral	ian Unity	Householder		FSI	803			0.00	Premiun	1 + Char	ancellation	
Co/Branch	0		Division	COM	Underw	writ	er GST		0.00	Commis	sion	enewal	0.00
corbranch			0000	Con	onderv				0.00	Commis	. cor		

The **Policy Transaction** screen displays:

Policy Trans	action					C	Submit	Print Preview	Suspend	Previous
Memo No	06090036	Class Renewal T	AUHH VPe ANN	Australian Uni Annual Renew	ity Householi vable	der	Transactior Status	CAN Cano C Cano	ellation elled	
Insured Deta	ils	۲	Antz Pantz	Clothing Co						
Insured	ANTZ		Antz Pantz	Clothing Co						
Insured Name	Antz Pantz C	othing Co			~ ~	Business				
Address	PO Box 1234 North Sydney	NSW 2059			< 3	<u>Executive</u> <u>Alternate Ex</u>	COGP ec COGP] Mr Peter Co Mr Peter Co	gan gan	
Division	COM	Commerci	al			Co. I	put the c	date the ca	Incellation	takes
Debtor	ABC	ABC Truss	es			Curr eff	fect in the	ne Effective	e Start fie	Id and
Doliny Start	2010010000		Policy End	20/00/2007		End de	ave the	Cancellatio	Ena date	as it
Effective Start	08/02/2007		Effective Er	nd 28/09/2007		Entry		cancenatio	113.	
Insurer Detai	ils	۷	CGU Insura	ance			Coinsuranc	e N		
Insurer (Sunris	e)			Policy I	No		Sunrise Statu	us		
Australian Unit	ty 💙		Click on the Sunrise button to launch the Insurer produ						roduct.	
			Comp	plete the re	quired	screens a	and return	n to bais .		

On returning to **bais** you can complete the transaction as normal, entering any **Broker's Fee** if not already entered within the Insurer product, and completing the **Invoice Particulars** section.

Annual Premium	11		Transactio	on Premium
Premium	391.50	3		-293.18
FSL	86.13	3		-64.50
Stamp Duty	47.29	9		-35.41
Brokers Fee]		
Rebate	%		%	
Fee GST	0.00			0.00
Non Refunded Brokerage				
Non Refunded Brokerage	GST			0.00
Other Charges	0.00	1		0.00
Premium GST	0.00)		-35.77
Policy Fee		1		0.00
Policy Fee GST	0.00	วี่		0.00
Client Payable	524.92	2		-428.86
Refund Brokerage	Y			
Brokerage 0.0000	% 0.00	21.4987	%	-63.03
Brokerage GST	8.42	2		-6.30
FBC	0.00	3		
Witholding Tax	0.00	3		0.00
Due to Insurer	516.50)		-359.53
Subagent Commission	0.00	3		0.00
Subagent GST	0.00	1		0.00
Net Brokerage	0.00)		-63.03
Wording, Clauses and	Notes 🧊	Insurers Standard Wording		
Invoice Particulars				
Statistical Code	Property Dispose	ed Of/Risk Off		
Business Analysis Code	New Business/Exi	sting Client/Renewable		
Brief Detail	Property Dispose	d Of/Risk Off		
Detail Notes	Policy cancell	ed effective 08/02/07 as the pr	operty has	~
	been sold and	cover is no longer required.		
				1000
				× .

When all required details have been recorded you can **submit** the record. You will be asked to confirm:

VBScript: DesignB/	AIS	
Are you sure you war	nt to write this	record
<u>Y</u> es	No	

You are then offered a selection of documents to print.

Note – these are your standard set of documents - Printing the Insurer's document will be covered later in this manual.

Sunrise Lapse

This function allows you to **Lapse a Sunrise** policy. No transactions are created, it will update **bais** once End of Day has been run. No records are sent to Sunrise.

1emo No	>	Туре	Class	Risk Description	Policy Number	U/W	St	Start	End	Invoice	Client Orig Amt	Client O/S Amt	Creditor Orig Amt	Creditor O/S Amt
7120020		Pol	AUHH	Sunrise (UNC)	H 901724	AU	A	07/12/07	07/12/08	122802	1302.89	1302.89	1041.05	1041.05
7120001		Pol	CMV	ABC123 1995 TOYOT#	CMV001078	ROYAL	Α	01/05/06	01/05/07	122776	2200.00	2200.00	1980.00	1980.00
7110030		Pol	SPIPI	Sunrise Placements Gen	To Be Advised	ROYAL	Α	01/11/07	01/11/08	122700	2381.50	2381.50	2381.50	2381.50
7110026		Pol	SPIPI	Sunrise Placements Gen	To Be Advised	ROYAL	A	01/11/07	01/11/08	122697	2381.50	0.00	2381.50	2381.50
7100019		Pol	INSTRV	Sunrise (CLS)	INS1191828231627	INSURER	A	08/10/07	08/10/08	122584	136.97	136.97	123.46	123.46
7100018	>>	Pol	AUHH	Sunrise (CLS)	H 901663	AU	A	08/10/07	08/10/08	122583	931.00	931.00	776.68	776.68
7100017		Pol	ZURAL	Sunrise (CLS)	23000057XTST	ROYAL	A	08/10/07	08/10/08	122582	617.24	617.24	503.99	503.99
7090050		Pol	PLPR	Professional Indemnity	To Be Advised	DUAL	A	20/09/07	20/09/08	122590	1732.50	1732.50	1402.50	1402.50
olicies: 54 Transactio	on s	Summa	ary:	Memo N	o: 07100018				Acti	ions:	Select Enquir	v 💌 🛛	Sunrise Lanse	
Tran Date		08/10	/07			Pr	emium	1		652.50		E	Transaction ndorsement	Entry
Class		Austra	alian Unit	y Householder		FS	SL.			123.98	Premiur	n + Chard	ancellation	
Co/Branch		0		Division	COM	Ur	nderwr	iter GST		77.65	Commis	ssion 21 🔝	unrise Lapse	
Insurer		AU		Australian Unity		st	amp D	uty		76.87	Commis	ssion GST	olicy Mainten	ance 14.
													_ †	

Highlight the Memo you wish to Lapse. Click to invoke Sunrise Lapse.

Once Sunrise Lapse has been invoked the following message will appear

Policy Lapse	- Sunrise Transaction	Previous
Memo No	07100018	
Start	08/10/07	Click to return to Client Processing Menu this will not process a Lapse.
Period End	08/10/08	
Client Name	Ant'z & Pantz Clothing Co Ltd	
This form is use Sunrise policy w lapse the policy,	d to lapse a Sunrise policy. It will not cri ill be lapsed by the end-of-day process. or the Previous button to return to the	eate any transactions. The Press the Lapse button to Client Processing form.
Lapse	Click to Lapse Policy you will be reactive this is complete.	turned to the Client Processing Menu when

The policy will appear as follows once End of Day is run the Status of Active will change to Lapse.

Merno No	>	Туре	Class	Risk Description	Policy Number	U/W	St	Start	End
07100018	>>	Pol	AUHH	Sunrise (iBais Lapse)	H 901663	AU	A	08/10/07	08/10/08

Renewals

Renewing Existing Sunrise Policies

When the renewal terms have been sent through by the current insurer, you can **renew** existing Sunrise policies by **highlighting** the required policy in the **Client Processing** screen and selecting **Renewal** from the **Transaction Entry** drop down menu.

Client Pro	ces	sing												Clear
Client Code		[OANDR00	ANDREW MOR	RIS				Action	s: Se	lect Action	✓T	ransaction E	intry 🔽
Address						Contact Per	rson	e e e e e e e e e e e e e e e e e e e						
						Telephone				Re	tail/Wholesal	e N		
						Business Ph	hone	9		As	sociation			
Post Code		2176	5			Mobile Phor	ne			Er	nail	NA		
1 OSC COUC						Fax No				Ex	ecutive			
TY Gross			175,786.	98 TY Net Profit	22,744.34	Unallocated	<u>i</u>		Cur	rent		Balance		0.00
LY Gross				LY Net Profit		30 Days			60	Days		90+ Days	3	0.00
Active and	Ехр	ired P	olicies	🌒 Click '>>' c	ell to view policy h	istory					Click any high	nlighted cell	to view det	ails
Memo No	>	Туре	Class	Risk Description	Policy Number	u/w	St	Start	End	Invoice	Client Orig Amt	Client O/S	Creditor Oria Amt	Credito O/S Am
06120003	>>	Pol	ммнр	Sunrise (CLS)	122A776051HPK	QBE	А	05/12/06	05/12/07	120887	1161.98	0.00	1027.27	1027.27
06100044		Pol	DBC	Broadform Replacement	To Be Advised	LLOYDS	А	30/10/06	30/10/07	120755	174625.00	0.00	136921.87	128190.
Transactio	n Su	mmar		A Memo No:	06120003				Action	s* Se	lect Enquiny -		rapsaction F	intru-
Transactio	11 50	inniai	y.	- Heino Ho.	00120005				Action	3. [36	neur Eriquiry -	Tr	ansaction E	ntry
Tran Date Class	0 C	5/12/0 BE Me	l6 rc			Premiur FSL	n			816.45 152.69	Premium ·	End Car + Charg Den	orsement cellation	6.00 F
C- /D							14				4	Inter	100	10

The Policy Transaction screen below is displayed:

Policy Trans	action						Submit	Print Preview Suspend Previo	us
Memo No	06120003	<u>Class</u> <u>Renewal</u>		QBE Merc Annual Rener	wable		Transaction Status	Renewal R Renewal	
Insured Deta	ils	۲	ANDREW M	ORRIS					
Insured	0ANDR001		ANDREW M	ORRIS					
Insured Name	ANDREW MOR	RIS			~	Business			~
									2
Address					~	Executive	ANDS	Sheralyn Andrews	
					~	Alternate Exe	20		
Division	CON	Construct	ion			Co. Branch	0	B A Insurance Systems Pty Ltd	
Debtor	0ANDR001	ANDREW	MORRIS			Currency	AUD	Currency(Sum Insured) AUD	
Policy Start	05/12/2007		Policy End	05/12/2008		End Text	at 4pm Loca	l Time	
Effective Start	05/12/2007		Effective En	d 05/12/2008		Entry Date	08/02/07	Entered By ands SA	
Insurer Detai	ls	۲	QBE Insura	nce Co			Coinsurance	N	
Insurer (Sunris	e)			Policy	No		Sunrise Status		
QBE Insurance	e Co 💙			122A7	76051HPK		Closed		
Sunrise	1								

Click on the **Sunrise** button to access the Insurer product and complete the relevant details.

On returning to **bais** you can complete the transaction as normal, entering any **Broker's Fee** if not already entered within the Insurer product, and completing the **Invoice Particulars** section.

When all required details have been recorded, you can **submit** the record. You will be asked to confirm:

VBScript: DesignBA	IS	
Are you sure you wan	t to write this	s record
Yes	No	

You are then offered a selection of documents to print.

Note – these are your standard set of documents - Printing the Insurer's document will be covered later in this manual.

Import Renewals

The **Import Renewal List** is accessed from a menu accessible via the **All Options** tab at the top of the screen:

Home Account Selection Change Password All Options Favourites Logout

A list similar to the one shown below will be displayed.

Please note - that the list of available options may differ for different people as it is based on the security settings and authority allowed within the system.

Available Forms an	nd Reports				
Type Select Type	Category	Select Category	Sub Category Select Sub Category		
Favorites					
Туре	Category	Sub Category	Form/Report (Click to Run)	Image	Favorites
Broking	Broking		Rating Table Maintenance		No
	Maintenance	Reinsurance	Reinsurance Treaty Maintenance		No
			Treaty Risk Class Maintenance		No
	Processing		Client Enquiry and Policy Processing		No
			Client Claims Enquiry and Claims Processing		No
			Commercial Package Quote Request		No
			Liability Quote Request		No
		Sunrise	List Documents		No
			Sunrise - Import Download List		No
	Reports		Brokerage Taken Report		No
			Creditor Detail Report		No
			Creditor Report		No
			Earned Amounts - Life/Non Life		No
			Earned Amounts Life/Non Life		No
			Insurer Detailed Ageing by Insurer Type		No
			Invoice Summary report		No
			Monthly Earned Selection		No
Refine by Description		Refine			

An example of an **Import Download List** screen is shown below:

ome	Account Selection	Change Password	All Ontions	Favourites	Locut			
Sunrise - Imp	ort Download List		Contraction of the					
Policy Number	Memo Number	Process Type	Insured Name	,	From Date	To Date	Product	
POL00007IMP	07040113	Renewal	Bill Bloggs6		08/04/07	08/04/08	INSACC	1
POL000015IMP	Assign Mem	o = New Policy	Bill Bloggs 14		16/04/07	16/04/08	INSACC	
POL000014IMP	Assign Mem	o = New Policy	Bill Bloggs13		15/04/07	15/04/08	INSACC	
POL000013IMP	Assign Mem	o = New Policy	Bill Bloggs12		14/04/07	14/04/08	INSACC	
POL000020IMP	Assign Mem	o = New Policy	Bill Bloggs 19		21/04/07	21/04/08	INSACC	
POL000019IMP	Assign Mem	o = New Policy	Bill Bloggs 18		20/04/07	20/04/08	INSACC	
POL00009IMP	Assign Mem	o = New Policy	Bill Bloggs8		10/04/07	10/04/08	INSACC	
POL000018IMP	Assign Mem	o = New Policy	Bill Bloggs 17		19/04/07	19/04/08	INSACC	
POLOOOOSIMP	Assign Mem	o = New Policy	Bill Bloggs7		09/04/07	09/04/08	INSACC	
POL000017IMP	Assign Mem	o = New Policy	Bill Bloggs 16		18/04/07	18/04/08	INSACC	~
POLOOOO3IMP	Assign Mem	o # New Policy	Bill Bloggs2		04/04/07	04/04/08	INSACC	

Policies sent through as import downloads can be processed either as:

- **New Policy** (where there is no existing policy on the system and the underwriter has sent the New Business terms via Sunrise), or
- **Renewal** where there is an existing policy which was not on Sunrise previously, but is to be renewed via Sunrise.

Processing an Import Download as New Policy

To process a policy from the list as **New Business**, simply **click** on the **New Policy field** alongside the **Policy Number** of the policy you want to process, as shown below:

	Account Selection	Change Password	All Options	Favourites	Logout			
Sunrise - Imp	oort Download Lis	t						
Policy Number	Memo Number	Process Type	Insured Name		From Date	To Date	Product	
POL00007IMP	07040113	8 Renewal	Bill Bloggs6		08/04/07	08/04/08	INSACC	^
POL000015IMP	Assign Me	mo = New Policy	Bill Bloggs 14		16/04/07	16/04/08	INSACC	
POL000014IMP	Assign Me	mo = New Policy	Bill Bloggs13		15/04/07	15/04/08	INSACC	
POL000013IMP	Assign Me	mo + New Pol	Bill Bloggs 12		14/04/07	14/04/08	INSACC	
POL000020IMP	Assign Me	mo # New Pol	Bill Bloggs 19		21/04/07	21/04/08	INSACC	
POL000019IMP	Assign Me	mo = New Policy	Bill Bloggs 18		20/04/07	20/04/08	INSACC	
POL00009IMP	Assign Me	mo = New Policy	Bill Bloggs8		10/04/07	10/04/08	INSACC	
POL000018IMP	Assign Me	mo = New Policy	Bill Bloggs 17		19/04/07	19/04/08	INSACC	
POLOOOOSIMP	Assign Me	mo # New Policy	Bill Bloggs7		09/04/07	09/04/08	INSACC	
POL000017IMP	Assign Me	mo = New Policy	Bill Bloggs16		18/04/07	18/04/08	INSACC	×
POLO0003IMP	Assign Me	mo # New Policy	Bill Bloggs2		04/04/07	04/04/08	INSACC	

When you **click** on the **New Policy field** the screen below is displayed:

ome Account Selectio	n Change Password	All Options F	avourites	Logout		
Policy Transaction				Submit	Print Preview Suspend	Previous
Memo No NEW	Class INSAC Renewal Type ANN	_ Ins household Annual Renewable		Transaction Status	POL New Policy A Active	
Insured Details	۵					
Insured Name			Business			<u>8</u>
Address		× ×	<u>Executive</u> <u>Alternate Ex</u>			×
Division Debtor Delicy Chart art (actioners)	Doliny End	24/24/2020	<u>Co. Branch</u> <u>Currency</u> End Text		Currency(Sum Insured)	
Effective Start 21/04/2007	Effective E	21/04/2008 nd 21/04/2008	Entry Date	07/05/07	Entered By ands SA	
Insurer Details	AXROYAL I	NSURANCE COMPANY		Coinsurance	N	
Insurer (Sunrise) AXROYAL INSURANCE COMPAN Sunrise	Y	Policy No POL000020IMP		Sunrise Status		
Subagent Details	V					
Policy Specific Details	V					
Risk Details and Premiums	۵					

Input the **Insured Code** and any **other required details**, and then **click** on the **Sunrise** button to proceed with processing as a new Policy. The transaction is then **completed** as per normal processing, but the Underwriter product screens are pre-populated with the details sent through in the Import record.

On completion, you are returned to the Import Download List.

Processing an Import Download as a Renewal

To process a policy from the list as **Renewal**, you need to identify the **Memo number** of the expiring **Non-Sunrise** policy to be **Imported** into Sunrise. **Click** on the **Assign Memo Number field** as shown below:

lome	Account Selection	Change Password	All Options	Favourites Logout			
Sunrise - Imp	oort Download Lis	ŧ					
Policy Number	Memo Number	Process Type	Insured Name	From Date	To Date	Product	
POL00007IMP	Assign Me	ar 📊 🛛 enewal	Bill Bloggs6	08/04/07	08/04/08	INSACC	-
POL000015IMP	Assign Me	ar New Policy	Bill Bloggs 14	16/04/07	16/04/08	INSACC	
POL000014IMP	Assign Me	emo = New Policy	Bill Bloggs 13	15/04/07	15/04/08	INSACC	
POL000013IMP	Assign Me	emo # New Policy	Bill Bloggs12	14/04/07	14/04/08	INSACC	
POL000020IMP	Assign Me	emo # New Policy	Bill Bloggs 19	21/04/07	21/04/08	INSACC	
POL000019IMP	Assign Me	emo = New Policy	Bill Bloggs 18	20/04/07	20/04/08	INSACC	
POL00009IMP	Assign Me	emo = New Policy	Bill Bloggs8	10/04/07	10/04/08	INSACC	
POL000018IMP	Assign Me	emo = New Policy	Bill Bloggs 17	19/04/07	19/04/08	INSACC	
POLOOOOSIMP	Assign Me	amo # New Policy	Bill Bloggs7	09/04/07	09/04/08	INSACC	
POL000017IMP	Assign Me	emo = New Policy	Bill Bloggs 16	18/04/07	18/04/08	INSACC	~
POLOOOO3IMP	Assign Me	amo # New Policy	Bill Bloggs2	04/04/07	04/04/08	INSACC	

This calls a screen as shown below which enables you to look up the **Memo Number** if required, or input if known.

🔊 DesignBais Tools - Su	inrise - Assign/Deassigr	n Memo		<
Sunrise - Assign a I	Memo Number			
Memo Number <u>Clear Memo Number</u>	07040113	Classification Client	PULSE MCLEAN	
Search for a Memo/P	olicy using the followi	ing:		
Insured Name				
Policy No				
Policy Search Accept				

Once the Import has a valid **Memo Number** attached, you will see the **Process Type field** alongside it is altered to **Renewal**, as this is the only valid option.

Click on the Renewal field, as shown below, to proceed with the Imported Renewal transaction.

	Account Selection	Change Password	All Options	Favourites	Logout			
Sunrise - Imp	oort Download Lis	ŧ						
Policy Number	Memo	Process Type	Insured Name		From Date	To Date	Product	
POL00007IMP	0704011	3 Renewal In	lill Bloggs6		08/04/07	08/04/08	INSACC	~
POL000015IMP	Assign Me	amo # New Policy	Bill Bloggs 14		16/04/07	16/04/08	INSACC	
POL000014IMP	Assign Me	emo # New Policy	Bill Bloggs13		15/04/07	15/04/08	INSACC	
POL000013IMP	Assign Me	emo # New Policy	Bill Bloggs12		14/04/07	14/04/08	INSACC	
POL000020IMP	Assign Me	emo # New Policy	Bill Bloggs 19		21/04/07	21/04/08	INSACC	
POL000019IMP	Assign Me	emo = New Policy	Bill Bloggs 18		20/04/07	20/04/08	INSACC	
POL00009IMP	Assign Me	emo = New Policy	Bill Bloggs8		10/04/07	10/04/08	INSACC	
POL000018IMP	Assign Me	emo = New Policy	Bill Bloggs 17		19/04/07	19/04/08	INSACC	
POLOOOOSIMP	Assign Me	emo # New Policy	Bill Bloggs7		09/04/07	09/04/08	INSACC	
POL000017IMP	Assign Me	emo = New Policy	Bill Bloggs 16		18/04/07	18/04/08	INSACC	×
POLOOOO3IMP	Assign Me	amo # New Policy	Bill Bloggs2		04/04/07	04/04/08	INSACC	

Amending Sunrise Renewals

Sunrise renewals can be amended at any time up to the **expiry date** of the current policy. Once the expiry date has passed, the renewal becomes the **active** version and changes can be made by **Endorsement**.

To amend a renewal: high

highlight the policy in the Client Processing screen and select Amend Renewal from the Transaction Entry drop down menu.

											Clear
Client Code	[PIGOUT	🔄 🌢 Harry Smith	t/as Pig Out Cafe			Actions:	Select Action	🗸	-Transactio	n Entry
Address	PO E	Box 123			Contact Pers	on Mr H S	mith				
	Nort	h Sydney	NSW 2060		Telephone	02 999	9 0000	Retail/Wholes	sale RETAIL		
					Business Pho	one 02 999	9 1000	Association	TEST A	SSOCIATIO	N
					Mobile Phone	0400 1	11 222	Email	CODE harry@	pigout.com	.au
Post Code	2060	0			Fax No	02 999	9 2222	Executive	Vernon	Elderfield	
TY Gross		165,803	.86 TY Net Profit	14,001.67	Unallocated		Current		Balance	2	0.00
LY Gross			LY Net Profit		30 Days		60 Days	1	90+ Da	ays	0.00
	> Type	Class	Risk Description	Po as show	wn here t	o allow	Amend	Client Orig Amt	Client O/S Amt	Creditor Orig Amt	Creditor O/S Amt
07020016 [*] R 07020016 06120097 06120043 [*] Q	Ren Pol Quc	Class INSACC AUHH INSTRV	Risk Description Sunrise (SLS) Sunrise (UNC) Sunrise Sunrise	Po as show Renewa SU renewal To date.	wn here t I. *R sta with a	o allow itus indi future e	Amend icates a effective	Client Orig Amt 6634.30 5300.37 981.47 0.00	Client O/S Amt 6634.30 5300.37 981.47 0.00	Creditor Orig Amt 6459.18 5149.60 810.95 0.00	Creditor O/S Amt 6459.18 5149.60 810.95 0.00
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07020016 [*] R 07020016 06120097 06120043 [*] Q 06120042 [*] Q 06070007 04090001	Ren Pol Quc Quc Pol	Class INSACC AUHH INSTRV INSTRV ACMV CWAP	Risk Description Sunrise (CLS) Sunrise (UNC) Sunrise Sunrise WER3423 2000 TOYO' Section 1 - Material Day	Po as show Renewa su renewal To date. To Be Advised	wn here t I. *R sta with a	o allow atus indi future e	Amend icates a effective	Client Orig Amt 6634.30 5300.37 981.47 0.00 0.00 90750.00	Client O/S Amt 6634.30 5300.37 981.47 0.00 0.00 68740.00 0.00	Creditor Orig Amt 6459.18 5149.60 810.95 0.00 0.00 81675.00 12202.53	Creditor O/S Amt 6459.18 5149.60 810.95 0.00 0.00 81675.00 131.86
07020016 [#] R 07020016 06120097 06120043 [#] Q 06120042 [#] Q 06070007 04090001 04030049	Ren Pol Quc Quc Pol Pol Pol	Class INSACC AUHH INSTRV INSTRV ACMV CWAP CWSP	Risk Description Sunrise (CLS) Sunrise (UNC) Sunrise Sunrise WER3423 2000 TOYO' Section 1 - Material Dai Section 1 - Material Dai	Po as show Renewa su renewal ro date. CMV001040 To Be Advised To Be Advised	wn here t I. *R sta with a	o allow itus indi future e	Amend icates a effective 7/07/07 12044 2/03/05 11919 0/06/04 11866	Client Orig Amt 6634.30 5300.37 981.47 0.00 0.00 890750.00 113225.67 33 28806.74	Client O/S Amt 6634.30 5300.37 981.47 0.00 0.00 68740.00 0.00 0.00	Creditor Orig Amt 6459.18 5149.60 810.95 0.00 0.00 81675.00 12202.53 24178.30	Creditor O/S Amt 6459.18 5149.60 810.95 0.00 0.00 81675.00 131.86 4283.30
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Selecting Amend Renewal from the Transaction Entry drop down menu will take you into the Transaction Processing screen.

This screen is the same as for any renewal, so simply make the required changes in BA and/or Sunrise.

(Remember to use the Sunrise button to invoke the Insurer's product.)

Referral

This function will allow you to refer a transaction that is outside the insurer's guidelines to the insurer by remitting the details automatically to the insurer. The transaction will suspend, when you receive notification from the insurer you can retrieve the transaction and resume the processing.

When processing a transaction that requires **Referral** the following message will appear.

VBScript			
This transaction requires Manual rating will abandon this transaction	i. Selecting 'Yes' will subr	nit this transactio	on to the Underwriter for approval. Selecting 'N

Click YES to submit the transaction or NO to abandon.

Suspending a Transaction

When processing in Sunrise some products have a Suspend function which will return you to **bais** and auto suspend.

Sunrise Policies Requiring Closure

This report shows new business and renewal policies **not yet** closed. It should be run as part of your regular Sunrise housekeeping.

The **Sunrise Policies Requiring Closure** report is accessed via the **All Options** tab at the top of the screen or via your **Favourites**.

	Home	Account Selection Change	Password All Options Favourites	Logout		
Available For	ms and Reports					
Type Select Ty	ype 🔽	Category Select Category	Sub Category Select Sub Ca	ategory 💌		
						_
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a state of the sta			On-line Quoting	-	No	
			Recovery Transactions		Ves	
	Reports		Creditor Detail Report		No	-
			Creditor Outstanding with Broking Details		No	
			Debtor Outstanding with Broking Details		No	
			Earned Amounts - Life/Non Life		No	
			Income Reports		No	
			Insurer Annual Income Report		No	
			Insurer Detailed Ageing by Insurer Type		No	
			Invoice Summary report		No	
			Key Reports		No	
			Monthly Sales by Client		No	
			Monthly Summary Premium		No	
			Oustanding Claims by Insurer		No	
			Outstanding Claims Selection		No	
			Outstanding Premium Warranty Report		No	
			Outstanding Renewal Report		No	
			Sunrise Policies Requiring Closure		No	
			Tax Invoice Report		No	
			Trust Accounting Reports		No	-

Click on Sunrise Policies Requiring Closure and the following screen will appear.

🗿 Web Page Dialog		<u>?×</u>
Sunrise Policies Req	uiring Closure	
Printing Options		
Preview Mode		
Run Report	DEFAULT	<u> </u>

Click Run Report and the following report will appear.

Alnsur	ance Syste	ms Pt	y Lid		Sunrise Compan	Policies Rec ny BAInsu	iuiring Closure rance Systems Pty Ltd		-	9 NOV2007 - 15:09
ixecutive	Trx Date	Тур	Merno No	Policy No	Start	End 40	Insured Name	Class Description	Premium	Net Brokerage
NDS	22/02/07	POL	07020049	H 901419	22/02/07	22/02/08	Ant'z & Pantz Clothing Co Ltd	Australian Unity Householder	639.00	187.38
NDS	22/02/07	POL	07020050	H 901420	22/02/07	22/02/08	Ant'z & Pantz Clothing Co Ltd	Australian Unity Householder	639.00	187.38
NDS	14/03/07	POL	07030026	H 901461	20/03/07	20/03/08	Ant'z & Pantz Clothing Co Ltd	Australian Unity Householder	328.50	70.63
NDS	03/06/07	POL	07060006	SUN027394NSW	01/06/07	30/06/07	Ant'z & Pantz Clothing Co Ltd	Ins household	3,566.00	71.32
NDS	08/10/07	POL	07100018	H 901663	08/10/07	08/10/08	Ant'z & Pantz Clothing Co Ltd	Australian Unity Householder	652.50	140.29

This report will list the policies that are **unclosed**.

Should you want to close the policies, please follow the Manual Close steps, as detailed.

Manual Close

Some policies require **manual closing**. The **Closed** or **Unclosed** status is shown on the **Client Processing** screen as illustrated below:

Client Proc	essing											Clear
Client Code		PIGOUT	📕 🌢 Harry Smith	n t/as Pig Out Cafe			P	Actions:	Select Action	🖌	Transactio	n Entry ⊻
Address	PO	Box 123			Conta	ct Person	Mr H Smit	:h				
	Nor	th Sydney	y NSW 2060		Teleph	none	02 9999 0	0000	Retail/Wholes	ale RETAIL	4	
					Busine	ess Phone	02 9999 1	000	Association	TEST A	SSOCIATIO	N
2 22 2	22				Mobile	Phone	0400 111	222	Email	CODE harry@	pigout.com	.au
Post Code	206	50			Fax N	c	02 9999 2	222	Executive	Vernor	Elderfield	
TY Gross		165,803	.86 TY Net Profit	14,001.67	Unallo	cated		Currer	nt	Balanc	e	0.00
LY Gross			LY Net Profit		30 Da	ys		60 Da	ys	90+ D	ays	0.00
Memo No	> Type	Class	Risk Description	Policy Number	U/W	St Sta	art End	Invo	Client Orig	Client O/S	Creditor	Creditor O/S Amt
07020016*R	Ren	INSACC	Sunrise (CLS)	SUN027227NSW	ROYAL			\]]	nalaaad (II			459.18
07020016	Ren	INSACC	Sunrise (CLS)	SUN027227NSW	ROYAL	01030			licioseu (o	110) 56		149.60
06120097	>> Pol	AUHH	Sunrise (UNC)	H 901367	ROYAL	the tra	ansaction	onisi	indicated n	ere.		810.95
06120043*Q	Quc	INSTRV	Sunrise	To Be Advised	ROYAL	Q 20/	12/06 20/12	2/07	0.00	0.00	0.00	0.00
06120042*Q	Quc	INSTRV	Sunrise	To Be Advised	ROYAL	Q 11/	12/06 11/12	2/07	0.00	0.00	0.00	0.00
06070007	Pol	ACMV	WER3423 2000 TOYO	0° CMV001040	CGU	A 17/	07/06 17/07	7/07 1204	448 90750.00	68740.00	81675.00	81675.00
04090001	Pol	CWAP	Section 1 - Material D	aı To Be Advised	ROYAL	X 12/	03/04 12/03	3/05 [19]	191 13225.67	0.00	12202.53	131.86
04030049	Pol	CWSP	Section 1 - Material D	aı To Be Advised	ROYAL	X 12/	03/04 10/06	5/04 I186	28806.74	0.00	24178.30	4283.30
Transaction	Summa	ry:	Memo No	o: 06120097			P	Actions:	Select Enquir	y 💌 📘	Transactio	n Entry 💌
											 Transaction 	Entry
Tran Date	27/12/	06			Pre	emium		674	4.50		Cancellation	. Line y

Selecting **Sunrise Manual Close** from the **Transaction Entry** drop down menu will immediately invoke the Insurer's Sunrise product and allow you to complete the closing. Once completed, you are returned to the **Client Processing** screen and the Transaction status is updated to reflect that it is now closed.

Recovery Transactions

This function compares **bais** to Sunrise and highlights **mismatches** that need action. It should be part of your regular Sunrise housekeeping.

Please Note: If you see an error like this:

"Error from Sunrise - the Policy is not the latest version"

It indicates that there is a **mismatch** and Recovery Transactions procedure should be completed for this client/policy.

The **Recovery Transactions** is accessed via the **All Options** tab at the top of the screen or via your **Favourites**.

Available Forms and Reports Type Broking Category Processing Sub Category Select Sub Category Image Favorites Type Category Sub Category Form/Report (Click to Run) Image Favorites Type Cleant Enquiry and Policy Processing No No Image Favorites Broking Processing Client Enquiry and Policy Processing (Enquiry) No No Image Image Favorites No Image No Image Image Favorites Image Favorites Image Favorites No Image Favorites Image Fav	Home A	Account Selection	Change Password All Options	Favourites Report Cabinets Logout		
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Click on Recovery Transactions and the following screen will appear:

Home	Account Selection	Change Password	All Options	Favourites	Report Cabinets	Logout
Sunrise Re	ecovery	_				
Transaction D Transaction D	Date From	The Tran	nsaction date	is the date the the the the the the the the the t	transaction was pr ent Code	ocessed.
<u>Client</u>						
Recover Trar	nsactions 👞 (This option	may take a few mi	nutes)			
Transaction	ns to Process	Click	here to compa e Note this ma	are bais and s ay take a few m	Sunrise records. inutes	
Matched Tr-	ansactions					

Once the **Recovery Transactions** has been **completed** the updated screen will look like the following:

ome	Acc	ount Selection Change	Password	All Option:	s	Favourites	R	eport Cabinets	Logout	
Sunri	ise Recovery									
Transa Transa <u>Client</u>	action Date From action Date To	ARNIE Gra	nt Arnold Bu	siness Ente	prises					
Recov	er Transactions	(This option may tak	e a few minut	es)						
Trans	actions to Proc	ess		10.04						
Туре	Processing Action	l olicy Number	Start Date	End Date	Insured	Product	Premium	Sunrise Reference		Status
1000	Dracace in iBaie	UN026184VIC	08/12/06	08/12/07	ARNIE	INSACC	1,000.00	29APR2001A-11493	38-2-2	LPS/ACC
END	Delete in Sunrise		09/11/07	09/11/08 VBScri		INSTRU	82.00	29APR2001A-11919	98-2-3	CLS/CMP
REN END Match	Delete in Sunrise	15 Policy Number	09/11/07	VBScri	APNIE pt Recove	INSTEU	s2.00	29APR2001A-11919	98-2-3	CLS/CMP
END Match Type	Delete in Sunrise and Transaction Memorandum	ns Policy Number	09/11/07 Start Date	VBScri VBScri i Enu Date	APNIE pt Recove	ry List Updated	S2.00	29APR2001A-11919 Sunrise Reference	98-2-3	CLS/CMP Status
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Match Type N/B N/B REN N/B	Delete in Sunrise Memorandum 05120008 05120007 05120007 06120058 07110003 07110003	Policy Number 23000011XTST CVN502003656 SUN026184VIC SUN026184VIC INS1165900106507TR	09/11/07 Start Date 08/12/05 08/12/05 08/12/06 V 12/12/06 V 12/12/06	08/11/08 VBScri L Date 08/12/06 08/12/06 08/12/07 12/12/07	Recove	Product ZURALGI SUNHH INSACC INSACC INSTRV	82.00 Premium 1,256.66 372.74 1,000.00 1,000.00 101.00	29APR2001A-11919 Sunrise Reference 01MAY2001A-12606 03MAY2001A-10418 29APR2001A-11493 29APR2001A-11651 29APR2001A-11651	62-1-1 84-1-1 38-1-1 38-2-1 16-1-1 16-1-1	Status Status CLS/ACC UNC/AC CLS/ACC UNC/AC UNC/AC
Match Type N/B N/B REN N/B N/B	Delete in Sunrise Memorandum 05120008 05120007 05120007 06120058 07110003 07110005	Policy Number 23000011XTST CVN502003656 SUN026184VIC SUN026184VIC INS1165900106507TR INS1193974770051TR	09/11/07 Start Date 08/12/05 08/12/05 08/12/06 V 12/12/06 V 12/12/06 V 09/11/06	08/11/08 WBScri L Date 08/12/06 08/12/06 08/12/06 08/12/07 12/12/07 09/11/07	APNIE Pt Recove OK Insured ARNIE ARNIE ARNIE ARNIE ARNIE ARNIE ARNIE	Product ZURALGI SUNHH INSACC INSACC INSTRV INSTRV	82.00 Premium 1,256.6 372.74 1,000.00 1,000.00 101.00 82.00	29APR2001A-11919 Sunrise Reference 01MAY2001A-12606 03MAY2001A-10418 29APR2001A-11493 29APR2001A-11493 29APR2001A-11919 29APR2001A-11919	62-1-1 62-1-1 88-1-1 88-1-1 88-1-1 66-1-1 66-1-1 96-1-2	Status Status CLS/ACC • UNC/AC· UNC/AC· UNC/AC· UNC/AC· UNC/AC· UNC/AC·
Match Type N/B N/B REN N/B REN N/B REN	Delete in Sunrise Delete in Sunrise Memorandum 05120007 0512007 0512007 06120058 07110003 07110005	Policy Number 23000011XTST CVN502003656 SUN026184VIC SUN026184VIC INS1165900106507TR INS1193974770051TR INS1193974770051TR	09/11/07 Start Date 08/12/05 08/12/05 08/12/05 08/12/06 V 12/12/06 V 12/12/06 V 09/11/07	09/11/08 VBScri L Date 08/12/06 08/12/06 08/12/07 08/12/07 12/12/07 09/11/07 09/11/08	APNIE pt Recove OK Insured ARNIE ARNIE ARNIE ARNIE ARNIE ARNIE ARNIE ARNIE ARNIE	Product ZURALGI SUNHH INSACC INSTRV INSTRV INSTRV INSTRV	82.00 Premium 1,256.66 372.74 1,000.00 101.00 82.00 82.00 82.00	29APR2001A-11919 Sunrise Reference 01MAY2001A-12606 03MAY2001A-10418 29APR2001A-11493 29APR2001A-11493 29APR2001A-11919 29APR2001A-11919	62-1-1 62-1-1 84-1-1 38-1-1 38-2-1 16-1-1 96-1-1 96-1-1 96-1-1	Status Status CLS/ACC UNC/AC CLS/ACC UNC/AC UNC/AC CLS/ACC UNC/AC UNC/AC

On the Recovery List Updated, Click on OK.

Then commence the **Processing Action** as required. **Click** on the **highlighted cell** and the following screen will appear.

There are **two** possible Processing Actions, depending on the status of the mismatched transaction.

If the Processing Action is **Process** in **bais** when you click on the highlighted cell, you will be taken to the following screen.

🎒 Web Page Dialo	9			
Sunrise - Assigr	a Memo Number			
Memo Number Clear Memo Numbe	r -	Classification Client	Insert the Memo Num on Policy Search.	ber OR Click
Search for a Mem	- o/Policy using the fo	llowing:		
Insured Name	1	5.52 		
Policy No	SUN026184VIC			
Policy Search	Click on the Polic	<u>Policy Search</u> and th y No.	e Memo Number will de	fault in from
Accept				

Click Accept and you are taken back into **bais** processing screens to complete the transaction. Once all the details are complete press **Submit** and you will be taken back into the data recovery screen, the following message will appear.



Click OK and exit out if all **Processing Action** you have to do is completed.

If the Processing Action is **Delete in Sunrise** when you click on the highlighted cell, the following message will appear.



Click OK and the record will be removed. Exit out if all **Processing Action** you have to do is completed.

Printing the Insurer Document

Because policies are bound and issued on the spot via Sunrise, you can produce various **Insurer documents** (the options available will vary from one Insurer product to the next). To access these documents select **Sunrise Print** from the **Select Enquiry** drop down menu as shown below:

Client Code PIGOUT Harry Smith t/as Pig Out Cafe Actions: Select Action V Transa Address PO Box 123 North Sydney NSW 2060 Contact Person Mr H Smith Telephone 02 9999 0000 Retail/Wholesale RETAIL Association TEST ASSOCU Post Code 2060 TeST ASSOCU Moile Phone 02 9999 1000 Association TEST ASSOCU Post Code 2060 Test No 02 9999 2222 Email Test ASSOCU TY Gross 165,803.86 TY Net Profit 14,001.67 Unallocated Current Balance LY Gross LY Net Profit 14,001.67 Unallocated Current Balance Click '>>' cell to view policy history Click any highlighted cell to view 90+ Days 90+ Days Orig A Memo No Type Class Risk Description Policy Number U/W St Start End Invoice Client O/S Cred Ant 07020016*R Ren INSACC Sunise (CLS) SUN027227NSW ROVAL R 08/02/09	on Entry 💟
Address PO Box 123 North Sydney NSW 2060 Contact Person Mr H Smith Retail/Wholesale RETAIL Post Code 2060 Retail/Wholesale RETAIL Association TEST ASSOCIL Post Code 2060 165,803.86 TY Net Profit 14,001.67 Unallocated 02 9999 0202 Executive Vernon Elderfit TY Gross 165,803.86 TY Net Profit 14,001.67 Unallocated Current Balance 90+ Days Active and Expired Policies Click '>>' cell to view policy history Click any highlighted cell to view Memo No Ype Class Risk Description Policy Number U/W St Start End Invoice Client Orig Client O/S Antt Orig A 07020016 Ren INSACC Sunrise (CLS) SUN027227NSW ROVAL R 08/02/09 121129 6634.30 6634.30 6435 06120043*Q Quc INSTRV Sunrise To Be Advised ROVAL 2/2/12/06 1/2/12/0 981.47 981.47 810.47 06120042*Q Quc INSTRV Sunrise To Be Advised	
Post Code 2060 Mobile Phone 0400 111 222 Email harry epigout TY Gross 165,803.86 TY Net Profit 14,001.67 Unallocated Current Executive Vernon Elderfit LY Gross 165,803.86 TY Net Profit 14,001.67 Unallocated Current Balance LY Gross LY Net Profit 14,001.67 Unallocated Current Balance Active and Expired Policies L' Click '>>' cell to view policy history Click any highlighted cell to view Memo No > Type Class Risk Description Policy Number U/W St Start End Invoice Client Orig Armt Orig Arm 07020016*R Nem INSACC Sunise (CLS) SUN027227NSW ROVAL R 08/02/09 121129 6634.30 6634.30 6643.30 6435 06120097 Pol AUHH Sunise (CLS) SUN027227NSW ROVAL A 08/02/09 121129 6634.30 6634.30 6634.30 6634.30 6634.30	ON
TY Gross 165,803.86 TY Net Profit 14,001.67 Unallocated Current Balance LY Gross LY Net Profit 30 Days 60 Days 90+ Days Active and Expired Policies Click '>>' cell to view policy history Click any highlighted cell to view policy history Memo No > Type Class Risk Description Policy Number U/W St Start End Invoice Client Orig Am Cred Am Cred Am 07020016*R Ren INSACC Sunrise (CLS) SUN027 227 NSW ROYAL R 08/02/09 08/02/09 121129 6634.30 <	1.au
Active and Expired Policies Click '>>' cell to view policy history Click any highlighted cell to view policy history Memo No > Type Class Risk Description Policy Number U/W St Start End Invoice Client Orig Antt Client O/S Antt Cred Antt 07020016*R >> Ren INSACC Sunrise (CLS) SUN027227NSW ROVAL R 08/02/08 08/02/08 121129 6634.30	0.00
Memo No > Type Class Risk Description Policy Number U/W St Start End Invoice Client Orig Amt Client O/S Amt Creat Orig 07020016*R >> Ren INSACC Sunrise (CLS) SUN027227NSW ROYAL R 08/02/08 08/02/09 I21129 6634.30 6435 000 6010.00 5100.37 5310.37 5310.37 5310.37 5310.37 5310.37 5310.37 5310.37 5310.37 5310.37 5310.37 5310.37 5310.37 5310.37 5310.37 5314.47 981.47 981.47 981.47 981.47 981.47 981.47 981.47 981.47	details
07020016*R R INSACC Sunise (CLS) SUN027227NSW ROYAL R 08/02/08 08/02/09 121129 6634.30 <th< td=""><td>Creditor</td></th<>	Creditor
07020016 Ren INSACC Sunnise (CLS) SUN027227NSW ROYAL A 08/02/07 08/02/08 121128 5300.37 5300.37 5145 06120097 Pol AUHH Sunrise (CLS) H 901367 ROYAL A 27/12/06 27/12/07 121030 981.47 <t< td=""><td>6459.18</td></t<>	6459.18
06120097 Pol AUHH Sunrise (CLS) H 901367 ROYAL A 27/12/06 27/12/07 121030 981.47 981.47 81.0 06120043*Q Quc INSTRV Sunrise To Be Advised ROYAL Q 20/12/05 20/12/07 0.00	5149.60
06120043*Q Quc INSTRV Sunrise To Be Advised ROYAL Q 20/12/05 20/12/07 0.00	810.95
06120042*Q Que INSTRV Sunrise To Be Advised ROYAL Q 11/12/06 11/12/07 0.00 0.00 0	0.00
	0.00
06070007 Pol ACMV WER3423 2000 TOYO CMV001040 CGU A 17/07/06 17/07/07 120448 90750.00 68740.00 81675	81675.00
04090001 Pol CWAP Section 1 - Material Dai To Be Advised ROYAL X 12/03/04 12/03/05 119191 13225.67 0.00 12202	131.86
04030049 Pol CWSP Section 1 - Material Dai To Be Advised ROVAL X 12/03/04 10/06/04 118663 28806.74 0.00 24178	4283.30
Transaction Summary: 🔥 Memo No: 07020016*R Actions: Select Enquiry 👽 Transa	on Entry 💌
Tran Date 09/02/07 Premium 5,46 Schedule	
Class Inshousehold FSL 54 Reprint Documents rges	534.17
Co/Branch 0 Division COM Underwriter GST 54 Transaction Details	109.20
Insurer ROYAL AXROYAL INSURANCE COMPANY Stamp Duty 2 Specific T	10.92

Selecting Sunrise Print from the Select Enquiry drop down menu will automatically launch the **Insurer product** where you can select the documents to be printed.

Complete and when you return to the **bais** Screen you will be offered the opportunity to go immediately to the **List of Insurer** documents available to print.

VBScript: DesignBAIS	
Do you wish to view the Sunrise List Documents form?	Select Yes to display the list as shown below:

CARDON CA			Client Code and Name	Document
6120054	ands	H 901341	ANTZ - Antz Pantz Clothing Co	Ins Sched
6120097	ands	H 901367	PIGOUT - Harry Smith t/as Pig Out Cafe	Ins Sched

Click on the **memo number** to open the PDF of the listed document, which can then be **printed** or **saved** as required.

By default only your own documents will be displayed, but you can **tick the box** next to **View All Documents For All Users** to alter this setting and view documents requested by others.

List Documents

This function allows you to go directly to the Documents that have been requested from the Insurer.

The List Documents is accessed from a menu accessible via the All Options tab at the top of the screen

Home	Account Selection	Change Password All Options	Favourites Report Cal	binets Logout	
Availa	ble Forms and Reports				
Туре	Select Type 📃	Category Select Category	Sub Category S	elect Sub Category 💌	
Favorite	5				
Туре	Category	Sub Category	Form/Report (Click to Run) Post Code and Occupation opdate	Image	Favorites
			Property & Liability Quote Request		Yes
		Premium Funding	Portfolio Funding		Yes
		Sunrise	Batch Cancelation		No
			Batch Close		No
			Batch Renewals		No
			Import Download List		No
			List Documents		No
			On-line Quoting		No

Click on List Documents and the following screen will appear

lemo	Requested B	y Policy Number	Client Code and Name	Documer
7100019	chac	INS1191828231627TRV	ANTZ - Ant'z & Pantz Clothing Co Ltd	Ins Sched
100019	chac	INS1191828231627TRV	ANTZ - Ant'z & Pantz Clothing Co Ltd	Ins Sched
120018	chac	INS1196985291822TRV	GOTCHA - Gotcha Private Investigations	Ins Sched
Updates Sunrise Document	List of	By default only your own d tick to alter setting and vie	ocuments are displayed w documents requested	

Online Quoting

This function allows you to **obtain a quote from multiple insurers** by completing a single set of questions.

The **Online Quoting** function is accessed via the **All Options** tab at the top of the screen or via your **Favourites**:

vailable Forms	and Reports				
ype Select Type		Category Select Categor	γ ▼ Sub Category Select Sub Cat	tegory 💌	
avorites					
уре	Category	Sub Category	Form/Report (Click to Run)	Image	Favorites
		Provident Funding	Portfolio Funding		No
		Sunrise	Batch Cancelation		No
			Batch Close		No
			Batch Renewals		No
			FROM Sunrise templates		No
			Import Download List		No
			List Documents dm		No
			On-line Quoting		No
			Recovery Transaccions		No
			Sunrise Placements		No
			TO Sunrise templates		No
	Reports		Brokerage Taken Report		No
			Creditor Detail Report		No
			Creditor Outstanding with Broking Details		No
			Debtor Outstanding with Broking Details		No
			Earned Amounts - Life/Non Life		No
			Income Reports		No
			Insurer Detailed Ageing by Insurer Type		No
			Invoice Summary report		No
			Key Reports		No

Click on On-line Quoting and the following screen appears:

Home	Account Selection Change Password	All Options	
On-line Quoti	ng		
45	10		
<u>Client Code</u>	PIGOUT	Insert Client Code or loc will default in.	kup and details
Trading Name	Harry Smith t/as Pig Out Cafe		
Address		*	
Phone Number	02 9999 0000		
Contact Person	Mr H Smith		
Start Quoting 🗲	Click to Start Quoting		
Get Quote List	OR		
Click to get a listin	ng of policies already quoted on that you	would like to convert.	

Start Quoting

When you click on Start Quoting the following screen will appear

sunrise	on-line Quo Ange Als MCLEA	ting 🔶 Home 🤌 🍐	Contact Support Exit On-line Quoting		×
On-line Quoting	C.				
	CE SEARCH QUOTES	MY DETAILS	ADMINISTRATIO	N	M

Click on **type of insurance** required, (in this example Home Insurance) and this will take you into the quote screen.

Please Note: For details on how to navigate within On-line quoting you will need to refer to your Telstra eBusiness manual.

Once you have completed your transaction in On-line quoting the **Sunrise exchange Home** page will appear.

Close the window by **clicking** on the **X** or **Exit On-Line quoting** and you will be returned to the **bais** screen and prompted:



This will verify the transaction

Verifying transaction. Please wait...

Once this is done the following screen will appear

<u>Client Code</u>	PIGOUT					
rading Name	Harry Smith	√as Pig Out Cafe				
ddress		×.				
none Number ontact Person	02 9999 000 Mr H Smith)				
<u>tart Quoting</u> et Ouote List						
Supplier	Class/Product	Client Name	Start Date	End Date	Attachment Date	Quote Number
	ммінор	Harry Smith t/as Pig Out Cafe	20/11/07	20/11/08	20/11/07	307
LLTANZ	MMIHOP			1 N N	S 35	
	MMIHOP					
ALLIANZ	ммінор					

Click to start the transaction in bais.

The following screen will appear. You have three options to convert the policy.

On-line Quoting	Previous
Supplier	ALLIANZ
Product	ММІНОР
Client Name	Harry Smith t/as Pig Out Cafe
Start Date	20/11/07
End Date	20/11/0 You can enter Memo Number and this will RENEW an existing policy.
Quote Reference	307
Attachment Date	20/11/07
Memo Number	Convert to a Quote or Convert to a New Policy
Convert to a Quote	<u>Convert to a New Policy</u> (These options may take some time to process.)
Memo Number Search	Search allows you to locate the Memo Number.
Insured Name	
Policy No.	
Risk Description	
Туре	Current
0.007.008	
<u>Memo number search</u>	

Entering a Memo Number will process the quote as a **Renewal**. This will take you back to the **Policy Transaction** screen. Refer to Processing earlier in this chapter for details on how to process from this screen.

Clicking on Convert to a Quote will take you into the **Client Quotation** screen. Refer to Processing earlier in this chapter for details on how to process from this screen.

Clicking on Convert to a New Policy will take you into the **New Policy** screen. Refer to Processing earlier in this chapter for details on how to process from this screen.

Get Quote List

When you **Click** on **Get Quote List** the following screen will appear it will list all quotes that have been converted for all users.

Client Code Image: Client Code Trading Name Address Address Image: Client Code Phone Number Contact Person Image: Client Code Start Quoting Image: Client Code Get Quote List Image: Client Name Supplier Class/Product Client Name F19 F19HH PIGOUT 20/11/07 20/11/07 311 E19 F19HH CRICKET SUPPLIES P/L 07/12/07 07/12/07 07/12/07 339 au AUHH Harry Smith t/as Pig Out Cafe 11/12/07 11/12/07 316	On-line Quotir	ig					
Start Quoting Get Quote List Start Date End Date Attachment Date Quote Supplier Class/Product Client Name Start Date End Date Quote EIG EIGHH PIGOUT 20/11/07 20/11/07 311 EIG EIGHH CRICKET SUPPLIES P/L 07/12/07 07/12/07 339 au AUHH Harry Smith t/as Pig Out Cafe 11/12/07 11/12/07 346	<u>Client Code</u>		7				
Address	Trading Name						
Address							
Start Quoting Set Quote List Class/Product Client Name Start Date End Date Attachment Date Quote Number Supplier Class/Product Client Name Start Date End Date Attachment Date Quote Number EIG EIGHH PIGOUT 20/11/07 20/11/08 20/11/07 311 EIG EIGHH CRICKET SUPPLIES P/L 07/12/07 07/12/08 07/12/07 339 au AUHH Harry Smith t/as Pig Out Cafe 11/12/07 11/12/08 11/12/07 346	Address		×				
Contact Person Start Quoting Get Quote List Supplier Class/Product Client Name Start Date End Date Attachment Quote EIG EIGHH PIGOUT 20/11/07 20/11/08 20/11/07 311 EIG EIGHH CRICKET SUPPLIES P/L 07/12/07 07/12/08 07/12/07 339 au AUHH Harry Smith t/as Pig Out Cafe 11/12/07 11/12/08 11/12/07 346	Phone Number						
Start Quoting Get Quote List Supplier Class/Product Client Name Start Date End Date Attachment Date Quote Number EIG EIGHH PIGOUT 20/11/07 20/11/08 20/11/07 311 EIG EIGHH CRICKET SUPPLIES P/L 07/12/07 07/12/08 07/12/07 339 au AUHH Harry Smith t/as Pig Out Cafe 11/12/07 11/12/08 11/12/07 346	Contact Person						
Get Quote List Supplier Class/Product Client Name Start Date End Date Attachment Date Quote Number EIG EIGHH PIGOUT 20/11/07 20/11/08 20/11/07 311 EIG EIGHH CRICKET SUPPLIES P/L 07/12/07 07/12/08 07/12/07 339 au AUHH Harry Smith t/as Pig Out Cafe 11/12/07 11/12/08 11/12/07 346	Start Quoting						
Supplier Class/Product Client Name Start Date End Date Attachment Date Quote Number EIG EIGHH PIGOUT 20/11/07 20/11/07 20/11/07 311 EIG EIGHH CRICKET SUPPLIES P/L 07/12/07 07/12/08 07/12/07 339 au AUHH Harry Smith t/as Pig Out Cafe 11/12/07 11/12/08 11/12/07 346	<u>Get Quote List</u>						R
EIG EIGHH PIGOUT 20/11/07 20/11/08 20/11/07 311 EIG EIGHH CRICKET SUPPLIES P/L 07/12/07 07/12/08 07/12/07 339 au AUHH Harry Smith t/as Pig Out Cafe 11/12/07 11/12/07 346	Supplier	Class/Product	Client Name	Start Date	End Date	Attachment Date	Quote Number
EIG EIGHH CRICKET SUPPLIES P/L 07/12/07 07/12/07 339 au AUHH Harry Smith t/as Pig Out Cafe 11/12/07 11/12/08 11/12/07 346	EIG	EIGHH	PIGOUT	20/11/07	20/11/08	20/11/07	311
au AUHH Harry Smith t/as Pig Out Cafe 11/12/07 11/12/08 11/12/07 346	EIG 🕇	EIGHH	CRICKET SUPPLIES P/L	07/12/07	07/12/08	07/12/07	339
	au	AUHH	Harry Smith t/as Pig Out Cafe	11/12/07	11/12/08	11/12/07	346

Click to convert the quote.

This will invoke the same steps as Start Quoting where you can chose to Process as a Renewal, or Covert to a Quote or New Policy.

Sunrise Placements

This function allows you to obtain a quote on selected classes on line to the insurers via Telstra eBusiness. The policies created as a result of these quotes will be **MANUAL** policies and no further electronic transactions are enabled.

The **Sunrise Placement** function is accessed via the **All Options** tab at the top of the screen or via your **Favourites**.

vailable Form	ns and Reports				-
ype Select Typ	je 🔽	Category Select Category	Sub Category Select Sub Ca	ategory 💌	
<u>ivorites</u>					
уре	Category	Sub Category	Form/Report (Click to Run)	Image	Favorites
		Premium Funding	Portfolio Funding		No
		Sunrise	Batch Cancelation		No
			Batch Close		No
			Batch Renewals		No
			FROM Sunrise templates		No
		Import Download List			No
			List Documents dhy		No
				No	
			Recovery Transactions		No
			Sunrise Placements		No
			TO Sunrise templates		No
	Reports		Brokerage Taken Report		No
			Creditor Detail Report		No
			Creditor Outstanding with Broking Details		No
			Debtor Outstanding with Broking Details		No
			Earned Amounts - Life/Non Life		No
			Income Reports		No
			Insurer Detailed Ageing by Insurer Type		No
			Invoice Summary report		No
			Key Reports		No

Click on Sunrise Placements and the following screen will appear:

	Incourt	Insert Client Code or lookup
Trading Name	Harry Smith t/as Pig Out Cafe	and details will default in
Address		
Phone Number	02 9999 0000	
Contact Person	Mr H Smith	
Invoke Sunrise Place	Click to Invoke Sunrise Placements	
	OR	
Click to get a listing	of policies already quoted on that you would like to retrieve.]

Invoke Sunrise Placements

When you **Click** on Invoke **Sunrise Placements** the following screen will appear:

Mclea Mclea	SUI Tasks Creat	e New Reports	ement	S	sunris	e Te	Istra eBusiness Logout
My Tasks	My Tasks / C	iverdue 🕕					
> Overdue [3]	From	Insured	Product	Message type	Received date	Inception date	Due date
> Received [0]	TEBS / CraigL	NEVER SAY NEVER PTY LTD	PIT	Terms	08/10/2007 12:52 PM	12/10/2007	05/10/2007
> Drafts [2]	TEBS / CraigL	Aust Capital Territory Pty Ltd	PIT	Terms	08/10/2007 12:48 PM	01/10/2007	24/09/2007
	TEBS / CraigL	JACK ROBBINS	PIT	Terms	08/10/2007 12:43 PM	05/10/2007	28/09/2007
Insurer Tasks							
> Overdue [0]	My Tasks / R	eceived					
> Pending [2]	From	Insured	Product	Message type	Received date	Inception date	Due date
	My Tasks / D	rafts 👔					
	From	Insured	Product	Message type	Received date	Inception date	Due date
	BAIS / McleaM	<u>Mr Pig Out</u>	PIT	Quote Request		18/11/0007	15/11/2007
	BAIS / McleaM	NEVER SAY NEVER PTY LTD	PIT	Cover Request		12/10/2007	05/10/2007
	BAIS		Copyright © 200	7, Telstra eBusiness Servi	ces Pty Ltd	Version: 1.2.0-SNAF	SHOT Build No: 2

This will allow you to proceed with obtaining a quote.

Please Note: For details on how to obtain a quote using Sunrise Placements you will need to refer to your Telstra eBusiness manual.

Once you have completed your transaction in Sunrise Placement. The transaction will suspend and details will be sent to the insurer so they can rate the transaction. When you receive notification from the insurer you can retrieve the transaction and resume the processing.

Click Logout and you will be returned to bais.

Get Sunrise Placements

When you click on **Get Sunrise Placements** the following screen will appear it will list all quotes that have been bound for all users.

Sunrise Placements							
<u>Client Code</u>	PIGOUT						
Trading Name	Harry Smith t/a	as Pig O	ut Cafe				
Address	ddress						
Phone Number	02 9999 0000						
Contact Person	Mr H Smith						
Invoke Sunrise Placemer	nts						
Get Sunrise Placements							
Supplier Cla	ss/Product	Туре	Client Name	Start Date	End Date	Attachment Date	Quote Number
TEBS SPI	PI	Bound	Harry Smith t/as Pig Out Cafe	08/10/97	08/10/08	08/10/07	SP-165
TEBS SPI	PI	Bound	Harry Smith t∕as Pig Out Cafe	15/10/07	15/10/08	15/10/07	SP-164

Select the transaction and then **Click** to convert the transaction.

Important Note: Once you select to action a transaction from this list it drops off the list and CAN NOT be retrieved. You should complete the transaction or suspend to complete at a later date.

The following screen will appear.

Sunrise Placement		Previou	IS	You can enter a
Supplier	TEBS			Memo Number and
Product	SPIPI			this will RENEW an
Client Name	Harry Smith t/as Pig Out Cafe			existing policy. Please Note:
Start Date	15/10/07			This will invoke a
End Date	15/10/08			"Process as
Quote Reference	SP-164			Renewal function"
Attachment Date	15/10/07			
Memo Number				
Convert to a Quote	Convert to a New Policy (These options may take so	ome time to process.)	C	onvert to a Quote or onvert to a New Policy
Memo Number Search				
Insured Name Invoice Number Policy No		Search allows you t	o loca	te the Memo Number.
Risk Description				
туре	Current -			
<u>Memo number search</u>				

You have **three** options to convert the transaction.

Entering a Memo Number - this will process the quote as a Renewal. This will take you back to the Policy Transaction screen. Refer to Processing in Chapter 2 for details on how to process from this screen.

Click on Convert to a Quote - this will take you into the Client Quotation screen. Refer to Processing in Chapter 2 for details on how to process from this screen.

Click on Convert to a New Policy - this will take you into the New Policy screen. Refer to Processing in Chapter 2 for details on how to process from this screen.