



# Chapter 8

## Sunrise

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## Chapter 8 - Sunrise

### Configuration

#### Before you Start

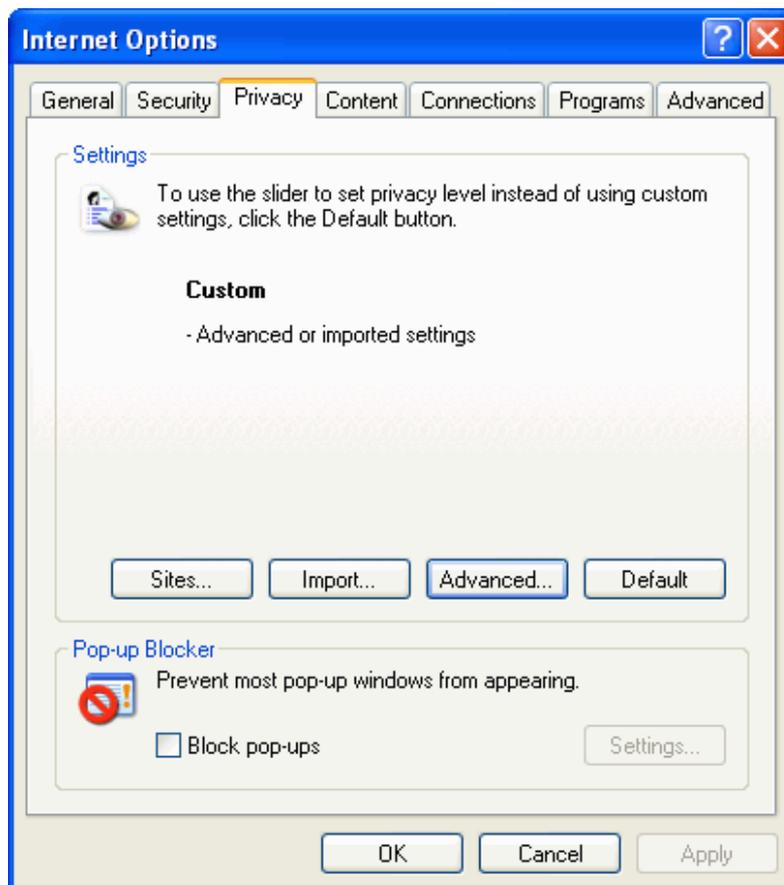
**ibais** is a fully accredited Sunrise application and uses the functionality available in the Internet Explorer browser.

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:



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

Then complete the form as outlined below.



OK the form and **OK again** to accept the changes.

## Sunrise Processing

This manual covers **the use of Sunrise products** within **ibais**.

This manual assumes a basic understanding of **processing** in **ibais** 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:

The screenshot shows the 'Client Processing' interface. At the top, there are navigation links: Home, Account Selection, Change Password, All Options, Favourites, and Logout. The main area is divided into two search sections: 'Client Details Search' and 'Policy Details Search'. Below these is a 'New Client Actions:' dropdown menu, which is highlighted with a red box. The dropdown menu contains the following options: -- Select --, -- Select --, Add New Client, Insurer Quotation, Client Quotation, and Placing Slip. The 'Client Quotation' option is currently selected.

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:

The screenshot shows the 'Client Processing' interface for an existing client. The 'Client Code' is 'GOTCHA' and the client name is 'Gotcha Private Investigations'. The screen is populated with client details such as address, contact person, and telephone numbers. At the top right, there is a 'Clear' button. Below the client details, there is an 'Actions:' dropdown menu, which is highlighted with a red box. The dropdown menu contains the following options: -- Select Action --, --Transaction Entry--, --Transaction Entry--, Insurer Quotation, Client Quotation, Placing Slip, Cover Note, New Policy, Fee Only Debit, and Sherilyn Andrews. The 'Client Quotation' option is currently selected.

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

## Chapter 8 - Sunrise

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

Home Account Selection Change Password All Options Favourites Logout

Policy Transaction Gotcha Private Investigations  Previous

Memo No NEW Class INSTRV Travel (Sunrise) Transaction QUC Quote to Client  
Renewal Type ANN Annual Renewable Status Q Quote

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

Policy Transaction Organiseit    Previous

Memo No NEW Class INSTRV Travel (Sunrise) Transaction QUC Quote to Client  
Renewal Type ANN Annual Renewable Status Q Quote

**Insured Details** Gotcha Private Investigations

Insured GOTCHA Gotcha Private Investigations  
Insured Name Gotcha Private Investigations Business Private Investigations  
Address Private Bag 007 Sydney NSW 2000 Executive ANDS Sheralyn Andrews  
Alternate Exec  
Division COM Commercial Co. Branch 0 B A Insurance Systems Pty Ltd  
Debtor GOTCHA Gotcha Private Investigations Currency AUD Currency(Sum Insured) AUD  
Policy Start 01/01/07 Policy End 01/01/08 End Text At 4pm Local Time  
Effective Start 01/01/07 Effective End 01/01/08 Entry Date 11/12/2007 Entered By chac

**Insurer Details** Insurance Limited Coinsurance N  
Insurer (Sunrise) Insurance Limited Policy No To Be Advised Sunrise Status  
 Sunrise Risk Description

Subagent Details  
Risk Details and Premiums

When you have completed the Policy Start and End Dates and any other required information, and selected the Insurer (if more than one available), **Click** on the Sunrise button to launch Sunrise.

If the policy class selected is a Sunrise class, the usual Insurer section is replaced with the Insurer (Sunrise) section as shown here. The drop down menu shows only the Insurer codes linked to the Sunrise product selected.

Data input here is searchable when looking up a policy.

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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	
Client Id:	GOTCHA
Client Name:	Gotcha Private Investigations
Client Address:	Private Bag 007 Sydney NSW 2000
Post Code:	2000
<a href="#">Client Details</a> <a href="#">Insured Details</a> <a href="#">Insurer Details</a> <a href="#">Intermediary Details</a>	
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	
Premium:	\$ 127.00
Tax:	\$ 12.70
Duty:	\$ 0.64
Agent Fee:	
Tax on Agent Fee:	
Total Payable:	
Commission	
Commission:	\$ 2.54
Tax on Commission:	\$ 0.25
<b>Complete the Insurer Product screens and navigate back to <b>ibais</b>.</b>	
Total Payable:	
Test Options	
Quote Valid Days:	
Closing Mode:	Auto
Retain Policy No:	<input checked="" type="checkbox"/>
Renewal Data:	<input type="checkbox"/>
Extra Info   CalcPremium   Finish   Cancel	

Sunrise Travel Product Release 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 **ibais** screen as shown below.

## Chapter 8 - Sunrise

Home   Account Selection   Change Password   All Options   Favourites   Logout

Memo No    Class  Travel (Sunrise)   Transaction  Quote to Client  
 Renewal Type  Annual Renewable   Status  Quote

**Insured Details**   Gotcha Private Investigations

Insured    Gotcha Private Investigations  
 Insured Name    Business

Address   

Division  Commercial  

Debtor  Gotcha Private In  

Policy Start    Policy

Effective Start    Effective

**Insurer Details**   Insu

Insurer (Sunrise)

**Subagent Details**

**Policy Specific Details**

**Risk Details and Premiums**   Sunrise

x	Item	Class	Brokerage%	State	Area	Description	Base Premium	FSL	GST	Stamp Duty	Total
	1	GEN	0.0000	NSW	M	Sunrise	127.00	0.00	12.70	0.64	140.34

**Premium Summary**   Client Payable   151.34   Actions:

Annual Premium		Transaction Premium	
Premium	127.00	Premium	127.00
FSL	0.00	FSL	0.00
Stamp Duty	0.64	Stamp Duty	0.64
Brokers Fee	<input type="text" value="10.00"/>	Brokers Fee	<input type="text" value="10.00"/>
Rebate	<input type="text" value=""/> % <input type="text" value=""/>	Rebate	<input type="text" value=""/> % <input type="text" value=""/>
Fee GST	<input type="text" value="1.00"/>	Fee GST	<input type="text" value="1.00"/>
Non Refunded Brokerage		Non Refunded Brokerage	
Non Refunded Brokerage GST		Non Refunded Brokerage GST	0.00
<b>Other Charges</b>	0.00	<b>Other Charges</b>	0.00
Premium GST	12.70	Premium GST	12.70
Policy Fee	<input type="text" value=""/>	Policy Fee	<input type="text" value=""/>
Policy Fee GST	0.00	Policy Fee GST	0.00
<b>Client Payable</b>	<b>151.34</b>	<b>Client Payable</b>	<b>151.34</b>
Refund Brokerage		Refund Brokerage	
Brokerage	2.0000 %   2.54	Brokerage	2.0000 %   2.54
Brokerage GST	0.25	Brokerage GST	0.25
FBC	0.00	FBC	0.00
Withholding Tax	0.00	Withholding Tax	0.00
<b>Due to Insurer</b>	<b>137.55</b>	<b>Due to Insurer</b>	<b>137.55</b>
Subagent Commission	0.00	Subagent Commission	0.00
Subagent GST	0.00	Subagent GST	0.00
<b>Net Brokerage</b>	<b>12.54</b>	<b>Net Brokerage</b>	<b>12.54</b>

**Wording, Clauses and Notes**   Insurers Standard Wording

**FSRA Documents**   There are no FSRA Document Requirements for this transaction

**When you return to **ibais** the figures and details entered into the Insurer product screens will be brought back into **ibais**.**

**You can add a Sub Agent if required.**

**Add your Broker's Fee if required (if not already entered in the Insurer's product).**

**When you have confirmed all the Premium details are correct click**

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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.



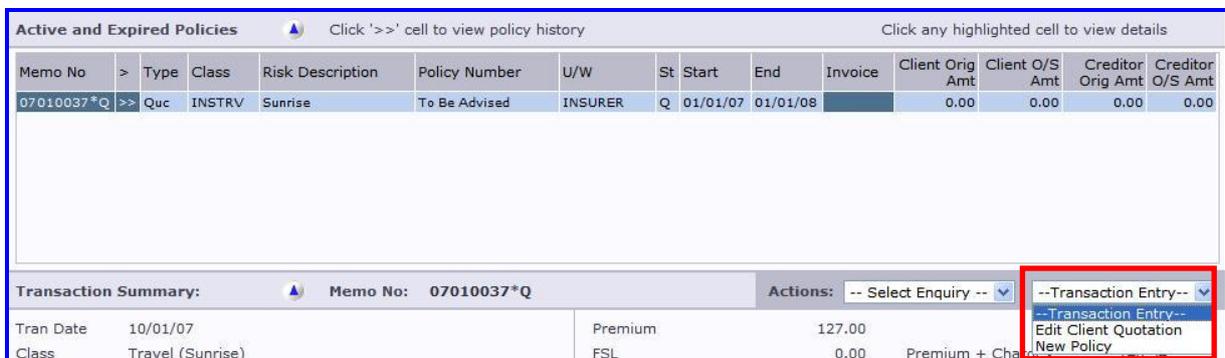
The dialog box titled "Print Or Preview Policy Document" has a header bar. Below the header, there is a section "Document To Print Or View" with a dropdown menu currently set to "Policy Documents". To the right, under "Action", there is a dropdown menu with "Print" selected, and "Print", "Email", and "Preview" options are visible. At the bottom, there are three buttons: "Print", "Preview", and "Cancel".

Lastly, a memorandum number is issued:



## 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:



The screenshot shows a table titled "Active and Expired Policies" with a table of data. Below the table is a "Transaction Summary" section with a dropdown menu for "Actions" that is open, showing options like "Transaction Entry", "Edit Client Quotation", and "New Policy".

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
07010037*Q	>>	Quc	INSTRV	Sunrise	To Be Advised	INSURER	Q	01/01/07	01/01/08		0.00	0.00	0.00	0.00

Transaction Summary: Memo No: 07010037\*Q

Tran Date	10/01/07	Premium	127.00
Class	Travel (Sunrise)	FSL	0.00

Actions: -- Select Enquiry --

- Transaction Entry--
- Transaction Entry--
- Edit Client Quotation
- New Policy

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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**.

Client Processing

Client Code:

Client Details Search

Insured Name:

and Insured Name:

Memo No:

Policy Details Search

Insured Name:

Invoice No:

or Policy No:

or Risk Description:

Version:

Policy Search

You are given the option to convert the quote to New Policy – to edit the quote without converting - simply select No.

VBScript: DesignBAIS

Do you wish to convert this quote to a new policy?

Yes No

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 **ibais**.

## 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.

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Clear
**Client Processing**

<b>Client Code</b>	ANTZ <span style="font-size: small;">▲ Antz Pantz Clothing Co</span>	<b>Actions:</b>	-- Select Action -- <span style="font-size: small;">▼</span> --Transaction Entry-- <span style="font-size: small;">▼</span>
--------------------	--	-----------------	---

Address	PO Box 12345 North Sydney NSW 2067	Contact Person	Danny Boyd
		Telephone	02 9999 0000 <span style="float: right; font-size: x-small;">Retail/Wholesale RETAIL</span>
		Business Phone	02 3299 0032 <span style="float: right; font-size: x-small;">Association ABC Trading Group</span>
		Mobile Phone	0412 333 555 <span style="float: right; font-size: x-small;">Email antz@antzpantz.com</span>
Post Code	2060	Fax No	02 9999 0111 <span style="float: right; font-size: x-small;">Executive Sheralyn Andrews</span>

TY Gross	64,479.23	TY Net Profit	7,262.50	<u>Unallocated</u>	-4200.00	Current	0.00	<u>Balance</u>	22987.24
LY Gross		LY Net Profit		30 Days	0.00	60 Days	0.00	90+ Days	29087.24

**Active and Expired Policies** Click any highlighted cell to view details

Click '>>' cell to view policy history

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	I20964	0.00	0.00	0.00	0.00
06120045*	Q	Quc	INSACC	Sunrise	To Be Advised	ROYAL	Q	11/12/06	11/12/07		0.00	0.00	0.00	0.00
06100050		Pol	PMV	Unknown	To Be Advised	AIG	A	01/10/06	01/10/07	I20761	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	00688005002	INSURETHAT	A	05/09/06	05/09/07	I20669	8857.21	8857.21	7423.36	7423.36
06090010		End	HH	Bldg DE - 1 MAIN ST	GPR000591	ROYAL	A	01/09/06	01/09/07	I20672	11.00	11.00	0.00	0.00
06090009		Pol	HH	Bldg DE - 1 MAIN ST	To Be Advised	CGU	A	01/09/06	01/09/07	I20653	1287.00	1287.00	1067.00	1067.00
06080048		Pol	HH	Bldg AD -	To Be Advised	MAMBA	A	29/08/06	29/08/07	I20533	4823.74	4823.74	3815.59	3815.59

**Transaction Summary:** Memo No: 06120054

Tran Date	12/12/06	Premium	0.00
Class	Australian Unity Householder	FSL	0.00
Co/Branch	0	Underwriter GST	0.00
Division	COM	Commission	0.00
Insurer	CGU	Stamp Duty	0.00

**Actions:** -- Select Enquiry -- ▼ --Transaction Entry-- ▼  
--Transaction Entry-- ▼  
Endorsement ▼  
Cancellation ▼  
Renewal ▼

The Policy Transaction screen displays:

**Policy Transaction** Submit Print Preview Suspend Previous

Memo No	06090036	Class	AUHH Australian Unity Householder	Transaction	CAN Cancellation
		Renewal Type	ANN Annual Renewable	Status	C Cancelled

**Insured Details** Antz Pantz Clothing Co

Insured: ANTZ Antz Pantz Clothing Co

Insured Name: Antz Pantz Clothing Co

Address: PO Box 1234 North Sydney NSW 2059

Executive: COGP Mr Peter Cogan

Alternate Exec: COGP Mr Peter Cogan

Division: COM Commercial

Debtor: ABC ABC Trusses

Effective Start: 08/02/2007 Effective End: 28/09/2007

**Insurer Details** CGU Insurance Coinsurance N

Insurer (Sunrise): Australian Unity

Policy No: Sunrise Status:

Click on the Sunrise button to launch the Insurer product.  
Complete the required screens and return to **bais**.

Input the date the cancellation takes effect in the Effective Start field and leave the Effective End date as it defaults for cancellations.

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.

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Annual Premium				Transaction Premium	
Premium	391.50				-293.18
FSL	86.13				-64.50
Stamp Duty	47.29				-35.41
Brokers Fee	<input type="text"/>				<input type="text"/>
Rebate	<input type="text"/> %		<input type="text"/>	%	<input type="text"/>
Fee GST	<input type="text"/> 0.00				<input type="text"/> 0.00
Non Refunded Brokerage					
Non Refunded Brokerage GST					0.00
<u>Other Charges</u>	0.00				0.00
Premium GST	0.00				-35.77
Policy Fee	<input type="text"/>				<input type="text"/> 0.00
Policy Fee GST	0.00				0.00
<b>Client Payable</b>	<b>524.92</b>				<b>-428.86</b>
Refund Brokerage	<input type="checkbox"/> Y				
Brokerage	0.0000 %	0.00	21.4987	%	-63.03
Brokerage GST		8.42			-6.30
FBC		0.00			
Withholding Tax		0.00			0.00
<u>Due to Insurer</u>	<b>516.50</b>				<b>-359.53</b>
Subagent Commission		0.00			0.00
Subagent GST		0.00			0.00
<b>Net Brokerage</b>	<b>0.00</b>				<b>-63.03</b>

**Wording, Clauses and Notes** ▼ Insurers Standard Wording

**Invoice Particulars** ▲

Statistical Code:

Business Analysis Code:

Brief Detail:

Detail Notes: 

Policy cancelled effective 08/02/07 as the property has been sold and cover is no longer required.

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



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.**

## Chapter 8 - Sunrise

### Sunrise Lapse

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

**Active and Expired Policies** Click any highlighted cell to view details

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
07120020		Pol	AUHH	Sunrise (UNC)	H 901724	AU	A	07/12/07	07/12/08	I22802	1302.89	1302.89	1041.05	1041.05
07120001		Pol	CMV	ABC123 1995 TOYOTA CMV001078		ROYAL	A	01/05/06	01/05/07	I22776	2200.00	2200.00	1980.00	1980.00
07110030		Pol	SPIPI	Sunrise Placements Gen To Be Advised		ROYAL	A	01/11/07	01/11/08	I22700	2381.50	2381.50	2381.50	2381.50
07110026		Pol	SPIPI	Sunrise Placements Gen To Be Advised		ROYAL	A	01/11/07	01/11/08	I22697	2381.50	0.00	2381.50	2381.50
07100019		Pol	INSTRV	Sunrise (CLS)	INS1191828231627	INSURER	A	08/10/07	08/10/08	I22584	136.97	136.97	123.46	123.46
07100018	>>	Pol	AUHH	Sunrise (CLS)	H 901663	AU	A	08/10/07	08/10/08	I22583	931.00	931.00	776.68	776.68
07100017		Pol	ZURAL	Sunrise (CLS)	23000057XTST	ROYAL	A	08/10/07	08/10/08	I22582	617.24	617.24	503.99	503.99
07090050		Pol	PLPR	Professional Indemnity To Be Advised		DUAL	A	20/09/07	20/09/08	I22590	1732.50	1732.50	1402.50	1402.50

Policies: 54

---

**Transaction Summary:** Memo No: 07100018 Actions: -- Select Enquiry --

Tran Date	08/10/07	Premium	652.50
Class	Australian Unity Householder	FSL	123.98
Co/Branch	0	Underwriter GST	77.65
Insurer	AU Australian Unity	Stamp Duty	76.87
Executive	ANDS Sheralyn Andrews	Policy Fee	0.00

--Transaction Entry--  
 Endorsement  
 Cancellation  
 Renewal  
**Sunrise Lapse**  
 Policy Inadmittance

**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:

Start: 08/10/07

Period End: 08/10/08

Client Name: Ant'z & Pantz Clothing Co Ltd

This form is used to lapse a Sunrise policy. It will not create any transactions. The Sunrise policy will be lapsed by the end-of-day process. Press the Lapse button to lapse the policy, or the Previous button to return to the Client Processing form.

**Click to Lapse Policy you will be returned to the Client Processing Menu when this is complete.**

**Click to return to Client Processing Menu this will not process a Lapse.**

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

Memo No	>	Type	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

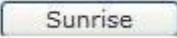
When the renewal terms have been sent through by the current insurer, you can **renew** existing Sunrise policies by **highlighting** the required policy in the **Client Processing** screen and selecting **Renewal** from the **Transaction Entry** drop down menu.

The screenshot shows the 'Client Processing' interface for client 'ANDREW MORRIS'. It includes a table of 'Active and Expired Policies' with columns for Memo No, Type, Class, Risk Description, Policy Number, U/W, St, Start, End, Invoice, Client Orig Amt, Client O/S Amt, Creditor Orig Amt, and Creditor O/S Amt. Two policies are listed: 06120003 (Sunrise (CLS)) and 06100044 (Broadform Replacement To Be Advised). Below the table is a 'Transaction Summary' section with a dropdown menu for 'Transaction Entry' that is open, showing options: Endorsement, Cancellation, and Renewal. The 'Renewal' option is highlighted.

The **Policy Transaction** screen below is displayed:

The screenshot shows the 'Policy Transaction' screen for policy 06120003. It displays details for the insured 'ANDREW MORRIS' and the insurer 'QBE Insurance Co'. The 'Sunrise' status is set to 'Closed'. A red box highlights the 'Sunrise' dropdown menu at the bottom left of the screen.

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

On returning to **ibais** 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:



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.

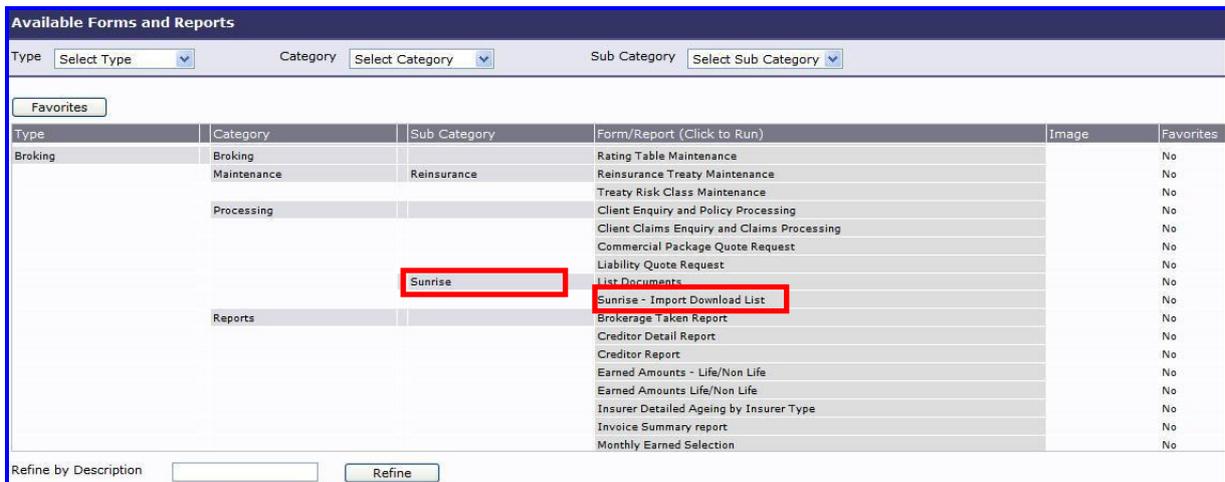
## Import Renewals

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



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.



Type	Category	Sub Category	Form/Report (Click to Run)	Image	Favorites	
Broking	Broking	Reinsurance	Rating Table Maintenance		No	
			Reinsurance Treaty Maintenance		No	
			Treaty Risk Class Maintenance		No	
	Processing		Sunrise	Client Enquiry and Policy Processing		No
				Client Claims Enquiry and Claims Processing		No
				Commercial Package Quote Request		No
				Liability Quote Request		No
				List Documents		No
				Sunrise - Import Download List		No
				Brokerage Taken Report		No
				Creditor Detail Report		No
	Reports			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	

## Chapter 8 - Sunrise

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

Clicking on any column heading will sort the list by that column.

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
POL000015IMP	Assign Memo #	New Policy	Bill Bloggs14	16/04/07	16/04/08	INSACC
POL000014IMP	Assign Memo #	New Policy	Bill Bloggs13	15/04/07	15/04/08	INSACC
POL000013IMP	Assign Memo #	New Policy	Bill Bloggs12	14/04/07	14/04/08	INSACC
POL000020IMP	Assign Memo #	New Policy	Bill Bloggs19	21/04/07	21/04/08	INSACC
POL000019IMP	Assign Memo #	New Policy	Bill Bloggs18	20/04/07	20/04/08	INSACC
POL00009IMP	Assign Memo #	New Policy	Bill Bloggs8	10/04/07	10/04/08	INSACC
POL000018IMP	Assign Memo #	New Policy	Bill Bloggs17	19/04/07	19/04/08	INSACC
POL00008IMP	Assign Memo #	New Policy	Bill Bloggs7	09/04/07	09/04/08	INSACC
POL000017IMP	Assign Memo #	New Policy	Bill Bloggs16	18/04/07	18/04/08	INSACC
POL00003IMP	Assign Memo #	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:

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
POL000015IMP	Assign Memo #	New Policy	Bill Bloggs14	16/04/07	16/04/08	INSACC
POL000014IMP	Assign Memo #	New Policy	Bill Bloggs13	15/04/07	15/04/08	INSACC
POL000013IMP	Assign Memo #	New Policy	Bill Bloggs12	14/04/07	14/04/08	INSACC
POL000020IMP	Assign Memo #	New Policy	Bill Bloggs19	21/04/07	21/04/08	INSACC
POL000019IMP	Assign Memo #	New Policy	Bill Bloggs18	20/04/07	20/04/08	INSACC
POL00009IMP	Assign Memo #	New Policy	Bill Bloggs8	10/04/07	10/04/08	INSACC
POL000018IMP	Assign Memo #	New Policy	Bill Bloggs17	19/04/07	19/04/08	INSACC
POL00008IMP	Assign Memo #	New Policy	Bill Bloggs7	09/04/07	09/04/08	INSACC
POL000017IMP	Assign Memo #	New Policy	Bill Bloggs16	18/04/07	18/04/08	INSACC
POL00003IMP	Assign Memo #	New Policy	Bill Bloggs2	04/04/07	04/04/08	INSACC

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

## Chapter 8 - Sunrise

**Policy Transaction** [Submit] [Print Preview] [Suspend] [Previous]

Memo No:  Class:  Ins household  
 Renewal Type:  Annual Renewable Transaction:  New Policy  
 Status:  Active

**Insured Details**

Insured Name:   
 Address:   
 Division:   
 Debtor:   
 Policy Start:  Policy End:   
 Effective Start:  Effective End:   
 Business:   
 Executive:   
 Alternate Exec:   
 Co. Branch:   
 Currency:  Currency(Sum Insured):   
 End Text:   
 Entry Date: 07/05/07 Entered By: ands SA

**Insurer Details** AXROYAL INSURANCE COMPANY Coinsurance: N  
 Insurer (Sunrise):  Policy No: POL000020IMP Sunrise Status:

**Subagent Details**  
**Policy Specific Details**  
**Risk Details and Premiums**

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:

Policy Number	Memo Number	Process Type	Insured Name	From Date	To Date	Product
POL00007IMP	<a href="#">Assign Memo #</a>	Renewal	Bill Bloggs6	08/04/07	08/04/08	INSACC
POL000015IMP	<a href="#">Assign Memo #</a>	New Policy	Bill Bloggs14	16/04/07	16/04/08	INSACC
POL000014IMP	<a href="#">Assign Memo #</a>	New Policy	Bill Bloggs13	15/04/07	15/04/08	INSACC
POL000013IMP	<a href="#">Assign Memo #</a>	New Policy	Bill Bloggs12	14/04/07	14/04/08	INSACC
POL000020IMP	<a href="#">Assign Memo #</a>	New Policy	Bill Bloggs19	21/04/07	21/04/08	INSACC
POL000019IMP	<a href="#">Assign Memo #</a>	New Policy	Bill Bloggs18	20/04/07	20/04/08	INSACC
POL00009IMP	<a href="#">Assign Memo #</a>	New Policy	Bill Bloggs8	10/04/07	10/04/08	INSACC
POL000018IMP	<a href="#">Assign Memo #</a>	New Policy	Bill Bloggs17	19/04/07	19/04/08	INSACC
POL00008IMP	<a href="#">Assign Memo #</a>	New Policy	Bill Bloggs7	09/04/07	09/04/08	INSACC
POL000017IMP	<a href="#">Assign Memo #</a>	New Policy	Bill Bloggs16	18/04/07	18/04/08	INSACC
POL00003IMP	<a href="#">Assign Memo #</a>	New Policy	Bill Bloggs2	04/04/07	04/04/08	INSACC

## Chapter 8 - Sunrise

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

DesignBais Tools - Sunrise - Assign/Deassign Memo.....

**Sunrise - Assign a Memo Number**

Memo Number:  Classification: PULSE  
Client: MCLEAN

[Clear Memo Number](#)

Search for a Memo/Policy using the following:

Insured Name:   
Policy No:

[Policy Search](#)

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.

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
POL000015IMP	<a href="#">Assign Memo #</a>	New Policy	Bill Bloggs14	16/04/07	16/04/08	INSACC
POL000014IMP	<a href="#">Assign Memo #</a>	New Policy	Bill Bloggs13	15/04/07	15/04/08	INSACC
POL000013IMP	<a href="#">Assign Memo #</a>	New Policy	Bill Bloggs12	14/04/07	14/04/08	INSACC
POL000020IMP	<a href="#">Assign Memo #</a>	New Policy	Bill Bloggs19	21/04/07	21/04/08	INSACC
POL000019IMP	<a href="#">Assign Memo #</a>	New Policy	Bill Bloggs18	20/04/07	20/04/08	INSACC
POL00009IMP	<a href="#">Assign Memo #</a>	New Policy	Bill Bloggs8	10/04/07	10/04/08	INSACC
POL000018IMP	<a href="#">Assign Memo #</a>	New Policy	Bill Bloggs17	19/04/07	19/04/08	INSACC
POL00008IMP	<a href="#">Assign Memo #</a>	New Policy	Bill Bloggs7	09/04/07	09/04/08	INSACC
POL000017IMP	<a href="#">Assign Memo #</a>	New Policy	Bill Bloggs16	18/04/07	18/04/08	INSACC
POL00003IMP	<a href="#">Assign Memo #</a>	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: **highlight** the policy in the **Client Processing** screen and select **Amend Renewal** from the **Transaction Entry** drop down menu.

**Client Processing**

Client Code: PIGOUT Harry Smith t/as Pig Out Cafe

Address: PO Box 123 North Sydney NSW 2060

Contact Person: Mr H Smith

Telephone: 02 9999 0000

Business Phone: 02 9999 1000

Mobile Phone: 0400 111 222

Fax No: 02 9999 2222

Post Code: 2060

Retail/Wholesale: RETAIL

Association: TEST ASSOCIATION

Email: harry@pigout.com.au

Executive: Vernon Elderfield

TY Gross: 165,803.86 TY Net Profit: 14,001.67 Unallocated: Current Balance: 0.00

LY Gross: LY Net Profit: 30 Days 60 Days 90+ Days 0.00

Active and Expired Policies

Memo No	Type	Class	Risk Description	Po	Client Orig Amt	Client O/S Amt	Creditor Orig Amt	Creditor O/S Amt					
07020016*R	Ren	INSACC	Sunrise (CLS)	SU	6634.30	6634.30	6459.18	6459.18					
07020016	Ren	INSACC	Sunrise (CLS)	SU	5300.37	5300.37	5149.60	5149.60					
06120097	Pol	AUHH	Sunrise (UNC)	H	981.47	981.47	810.95	810.95					
06120043*Q	Quc	INSTRV	Sunrise	To	0.00	0.00	0.00	0.00					
06120042*Q	Quc	INSTRV	Sunrise	To	0.00	0.00	0.00	0.00					
06070007	Pol	ACMV	WER3423 2000 TOYO	CMV001040	CGU	A	17/07/06	17/07/07	120448	90750.00	68740.00	81675.00	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	12202.53	131.86
04030049	Pol	CWSP	Section 1 - Material Dai	To Be Advised	ROYAL	X	12/03/04	10/06/04	118663	28806.74	0.00	24178.30	4283.30

Transaction Summary: Memo No: 07020016\*R

Tran Date: 09/02/07 Premium: 5,460.00

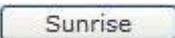
Class: Ins household FSL: 546.00 Premium + Char: ...

Transaction Entry dropdown menu options: Amend Renewal, Cancellation

**The policy must be in \*R status as shown here to allow Amend Renewal. \*R status indicates a renewal with a future effective date.**

Selecting **Amend Renewal** from the **Transaction Entry** drop down menu will take you into the **Transaction Processing** screen.

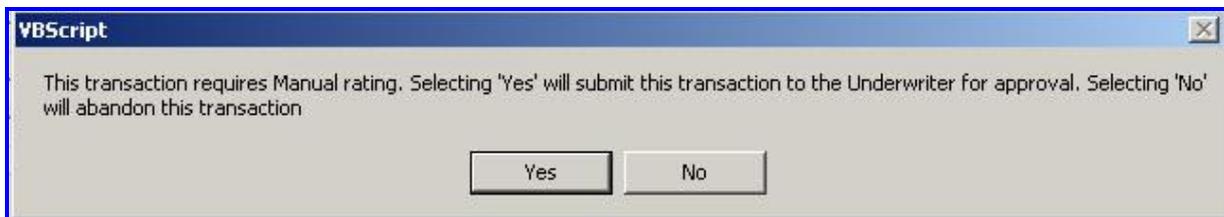
This screen is the same as for any renewal, so simply make the required changes in BA and/or Sunrise.

(Remember to use the  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.



Click **YES** to submit the transaction or **NO** to abandon.

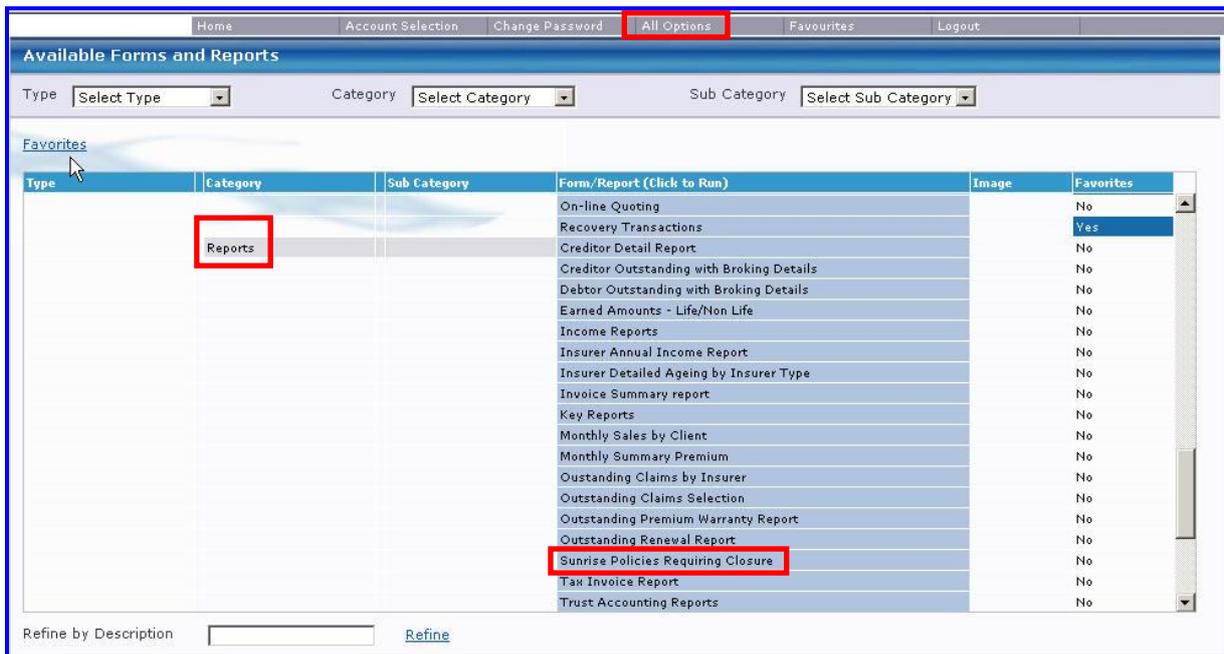
## Suspending a Transaction

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

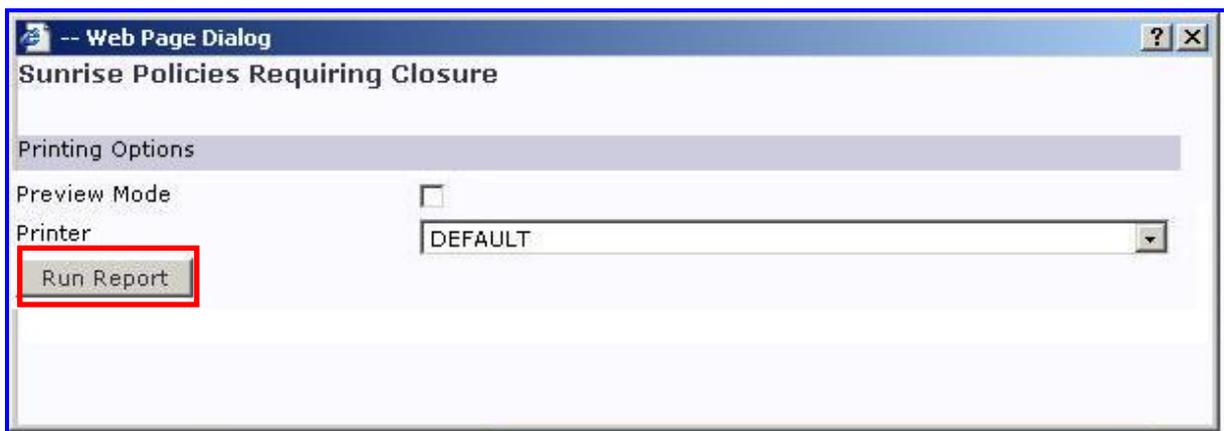
## Sunrise Policies Requiring Closure

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**.



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



Click **Run Report** and the following report will appear.

## Chapter 8 - Sunrise

Executive Trx Date	Type	Memo No	Policy No	Start	End	Insured Name	Class Description	Premium	Net Brokerage
ANDS 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
ANDS 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
ANDS 14/03/07	POL	07030028	H 901461	20/03/07	20/03/08	Ant'z & Pantz Clothing Co Ltd	Australian Unity Householder	328.50	70.83
ANDS 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
ANDS 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:

Memo No	>	Type	Class	Risk Description	Policy Number	U/W	St	Start	End	Invoice	Client Orig Amt	Client O/S Amt	Creditor Amt	Creditor S Amt
07020016	R	Ren	INSACC	Sunrise (CLS)	SUN027227NSW	ROYAL								459.18
07020016		Ren	INSACC	Sunrise (CLS)	SUN027227NSW	ROYAL								149.60
06120097	>>	Pol	AUHH	Sunrise (UNC)	H 901367	ROYAL								810.95
06120043	Q	Quc	INSTRV	Sunrise	To Be Advised	ROYAL	Q	20/12/06	20/12/07		0.00	0.00	0.00	0.00
06120042	Q	Quc	INSTRV	Sunrise	To Be Advised	ROYAL	Q	11/12/06	11/12/07		0.00	0.00	0.00	0.00
06070007		Pol	ACMV	WER3423 2000 TOYO	CMV001040	CGU	A	17/07/06	17/07/07	120448	90750.00	68740.00	81675.00	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	12202.53	131.86
04030049		Pol	CWSP	Section 1 - Material Dai	To Be Advised	ROYAL	X	12/03/04	10/06/04	118663	28806.74	0.00	24178.30	4283.30

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.

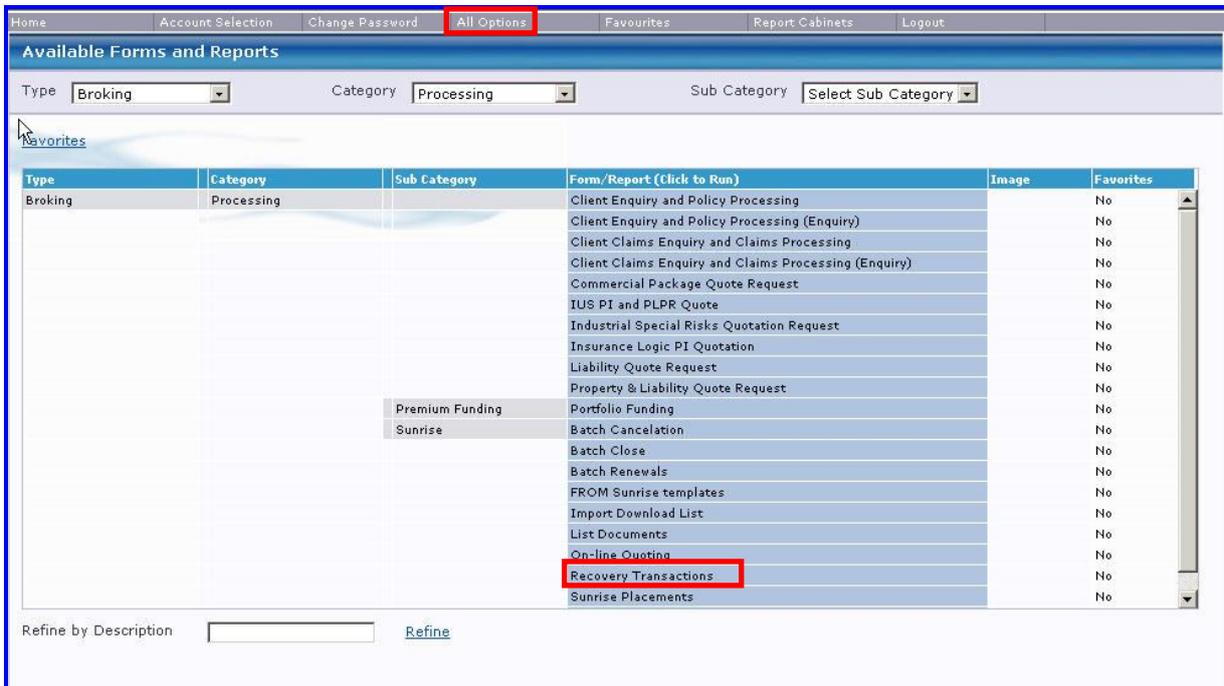
## Recovery Transactions

This function compares **ibais** 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**.



Click on **Recovery Transactions** and the following screen will appear:

## Chapter 8 - Sunrise

Home
Account Selection   Change Password   All Options   Favourites   Report Cabinets   Logout

### Sunrise Recovery

Transaction Date From:

Transaction Date To:

Client:

**The Transaction date is the date the transaction was processed.**

**Insert From and To date AND/OR Client Code**

[Recover Transactions](#) (This option may take a few minutes)

**Click here to compare **i**bais and Sunrise records.**

**Please Note this may take a few minutes**

Transactions to Process

Matched Transactions

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

Home
Account Selection   Change Password   All Options   Favourites   Report Cabinets   Logout

### Sunrise Recovery

Transaction Date From:

Transaction Date To:

Client:  Grant Arnold Business Enterprises

[Recover Transactions](#) (This option may take a few minutes)

Transactions to Process

Type	Processing Action	Policy Number	Start Date	End Date	Insured	Product	Premium	Sunrise Reference	Status
REN	Process in iBais	SUN026184VIC	08/12/06	08/12/07	ARNIE	INSACC	1,000.00	29APR2001A-114938-2-2	LPS/ACC
END	Delete in Sunrise		09/11/07	09/11/08	ARNIE	INSTRV	82.00	29APR2001A-119198-2-3	CLS/CMP

VBScript

Recovery List Updated

OK

Matched Transactions

Type	Memorandum	Policy Number	Start Date	End Date	Insured	Product	Premium	Sunrise Reference	Status
N/B	05120008	23000011XTST	08/12/05	08/12/06	ARNIE	ZURALG1	1,256.66	01MAY2001A-126062-1-1	CLS/ACC
N/B	05120007	CVN502003656	08/12/05	08/12/06	ARNIE	SUNHH	372.74	03MAY2001A-104184-1-1	UNC/AC
N/B	05120007	SUN026184VIC	08/12/05	08/12/06	ARNIE	INSACC	1,000.00	29APR2001A-114938-1-1	CLS/ACC
REN	06120058	SUN026184VIC	08/12/06	08/12/07	ARNIE	INSACC	1,000.00	29APR2001A-114938-2-1	UNC/AC
N/B	07110003	INS1165900106507TRV	12/12/06	12/12/07	ARNIE	INSTRV	101.00	29APR2001A-116616-1-1	UNC/AC
N/B	07110003	INS1193974770051TRV	09/11/06	09/11/07	ARNIE	INSTRV	82.00	29APR2001A-119196-1-1	CLS/ACC
REN	07110005	INS1193974770051TRV	09/11/07	09/11/08	ARNIE	INSTRV	82.00	29APR2001A-119196-2-1	UNC/AC
N/B	07110005	INS1194224307135TRV	09/11/06	09/11/07	ARNIE	INSTRV	82.00	29APR2001A-119198-1-1	CLS/ACC
REN	07110005	INS1194224307135TRV	09/11/07	09/11/08	ARNIE	INSTRV	83.00	29APR2001A-119198-2-1	CLS/ACC

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.

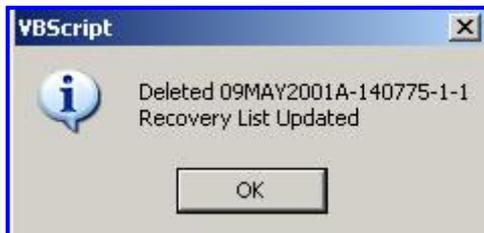
If the Processing Action is **Process** in **ibais** when you click on the highlighted cell, you will be taken to the following screen.

Click **Accept** and you are taken back into **ibais** 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:

The screenshot shows the 'Client Processing' window for 'Harry Smith t/as Pig Out Cafe'. It displays a table of 'Active and Expired Policies' with columns for Memo No, Type, Class, Risk Description, Policy Number, U/W, St, Start, End, Invoice, Client Orig Amt, Client O/S Amt, Creditor Orig Amt, and Creditor O/S Amt. Below the table is a 'Transaction Summary' for Memo No: 07020016\*R. A dropdown menu is open over the 'Actions' field, showing options like 'Schedule', 'Reprint Documents', 'Invoice Particulars', 'Transaction Details Specific', and 'Sunrise Print', which is highlighted with a red box.

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 **ibais** Screen you will be offered the opportunity to go immediately to the **List of Insurer** documents available to print.



Select **Yes** to display the list as shown below:

## Chapter 8 - Sunrise

**Sunrise Documents**

Memo	Requested By	Policy Number	Client Code and Name	Document
06120054	ands	H 901341	ANTZ - Antz Pantz Clothing Co	Ins Sched
06120097	ands	H 901367	PIGOUT - Harry Smith t/as Pig Out Cafe	Ins Sched

Any action performed on this form may take some time to process.  
All actions are sent to Sunrise for processing

View All Documents For All Users?

**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 Cabinets
Logout

**Available Forms and Reports**

Type  Category  Sub Category

Favorites

Type	Category	Sub Category	Form/Report (Click to Run)	Image	Favorites
			Post Code and Occupation Update		No
			Property & Liability Quote Request		Yes
		Premium Funding	Portfolio Funding		Yes
		Sunrise	Batch Cancellation		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

The screenshot shows the 'Sunrise Documents' interface. At the top is a blue header with the text 'Sunrise Documents'. Below this is a table with five columns: 'Memo', 'Requested By', 'Policy Number', 'Client Code and Name', and 'Document'. The table contains three rows of data. A red arrow points from a text box to the 'Memo' column of the first row. Below the table, there are two red-bordered text boxes. The first box says 'Click on Memo to open PDF of the listed document, which can then be printed or saved as required.' The second box says 'By default only your own documents are displayed tick to alter setting and view documents requested by others.' Below these boxes is a 'Refresh List' button and a checkbox labeled 'View All Documents For All Users?'. A red arrow points from the second text box to the checkbox. At the bottom right of the interface, there is a note: 'Any action performed on this form may take some time to process. All actions are sent to Sunrise for processing.'

Memo	Requested By	Policy Number	Client Code and Name	Document
07100019	chac	INS1191828231627TRV	ANTZ - Ant'z & Pantz Clothing Co Ltd	Ins Sched
07100019	chac	INS1191828231627TRV	ANTZ - Ant'z & Pantz Clothing Co Ltd	Ins Sched
07120018	chac	INS1196985291822TRV	GOTCHA - Gotcha Private Investigations	Ins Sched

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

Updates List of Sunrise Documents

By default only your own documents are displayed tick to alter setting and view documents requested by others.

Refresh List

View All Documents For All Users?

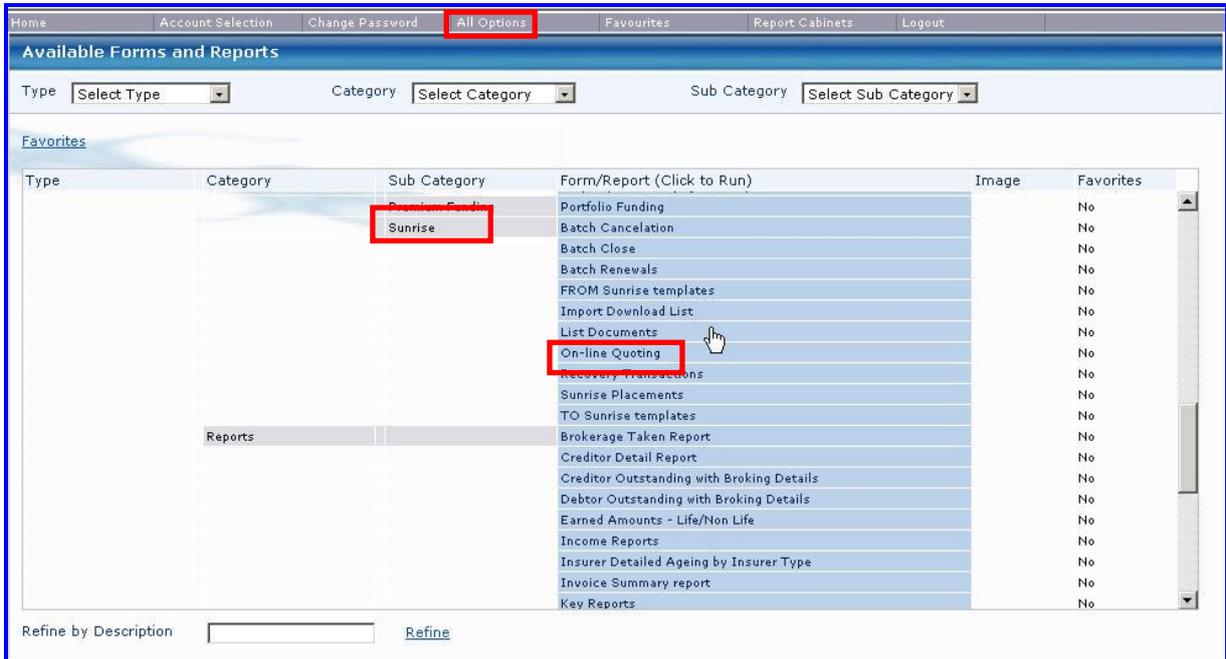
Any action performed on this form may take some time to process. All actions are sent to Sunrise for processing.

## Online Quoting

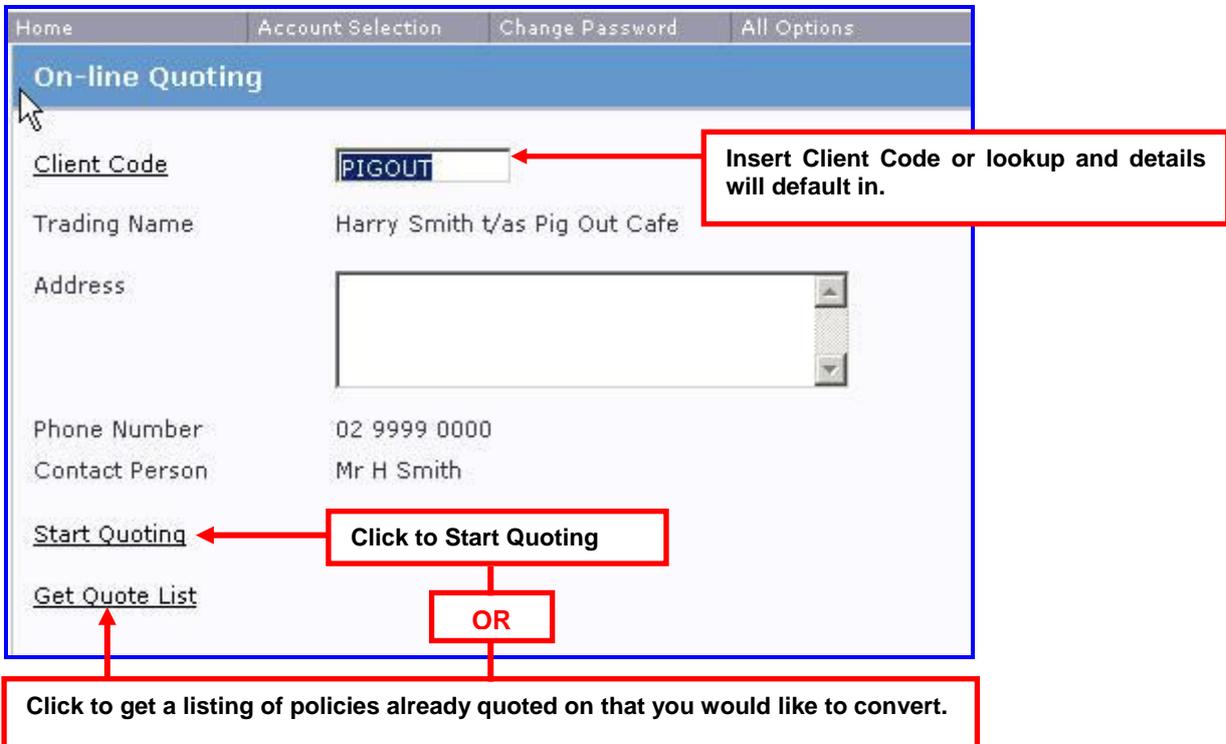
This function allows you to **obtain a quote from multiple insurers** by completing a single set of questions.

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

## Chapter 8 - Sunrise

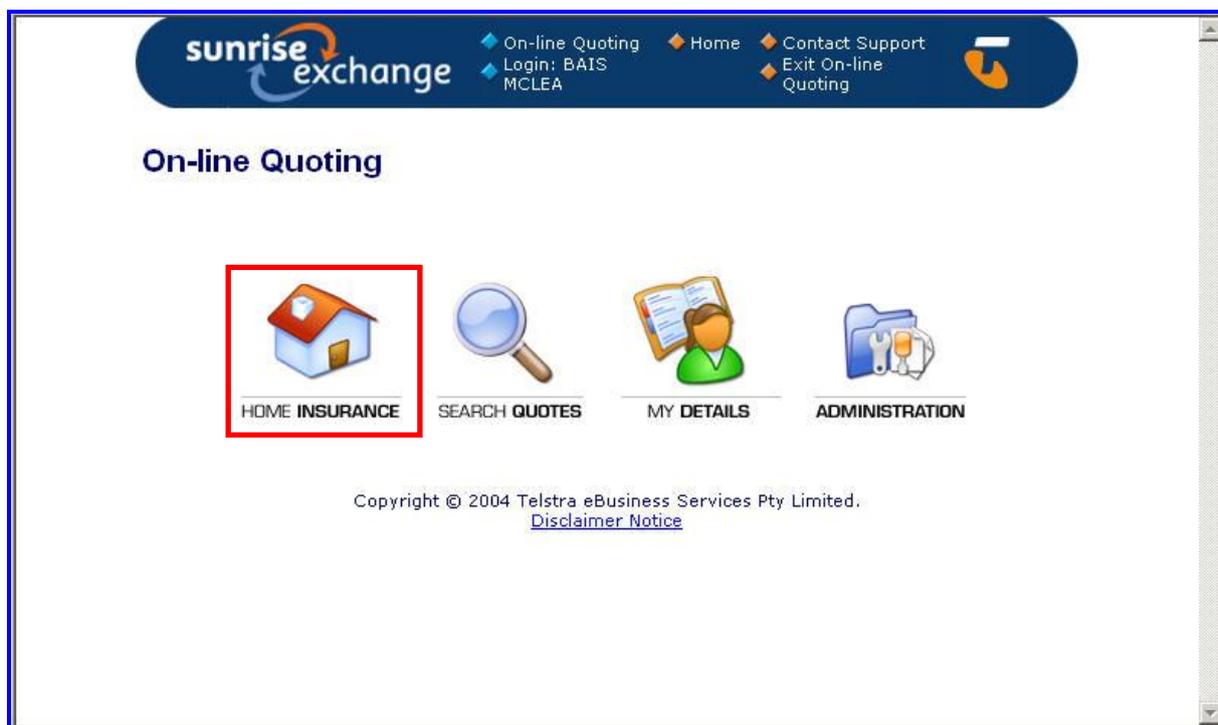


Click on **On-line Quoting** and the following screen appears:



## Start Quoting

When you **click** on **Start Quoting** the following screen will appear



**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 **ibais** screen and prompted:



This will **verify** the transaction



Once this is done the following screen will appear

**On-line Quoting**

Client Code: PIGOUT

Trading Name: Harry Smith t/as Pig Out Cafe

Address: [Empty text box]

Phone Number: 02 9999 0000

Contact Person: Mr H Smith

[Start Quoting](#)

[Get Quote List](#)

Supplier	Class/Product	Client Name	Start Date	End Date	Attachment Date	Quote Number
ALLIANZ	MMIHOP	Harry Smith t/as Pig Out Cafe	20/11/07	20/11/08	20/11/07	307
ALLIANZ	MMIHOP	Harry Smith t/as Pig Out Cafe	20/11/07	20/11/08	20/11/07	308

**Click to convert the quote.**

**Important Note:**  
Once you select to action a quote 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.

Click to start the transaction in **ibais**.

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

**On-line Quoting** Previous

Supplier: ALLIANZ  
Product: MMIHOP  
Client Name: Harry Smith t/as Pig Out Cafe  
Start Date: 20/11/07  
End Date: 20/11/07  
Quote Reference: 307  
Attachment Date: 20/11/07  
Memo Number:

[Convert to a Quote](#)   [Convert to a New Policy](#)   (These options may take some time to process.)

**Memo Number Search**

Insured Name:   
Invoice Number:   
Policy No:   
Risk Description:   
Type:

[Memo number search](#)

**You can enter Memo Number and this will RENEW an existing policy. Please Note: this will invoke a PROCESS AS RENEWAL function.**

**Convert to a Quote or Convert to a New Policy**

**Search allows you to locate the Memo Number.**

**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.

**On-line Quoting**

Client Code

Trading Name

Address

Phone Number

Contact Person

[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

**Click** to convert the quote.

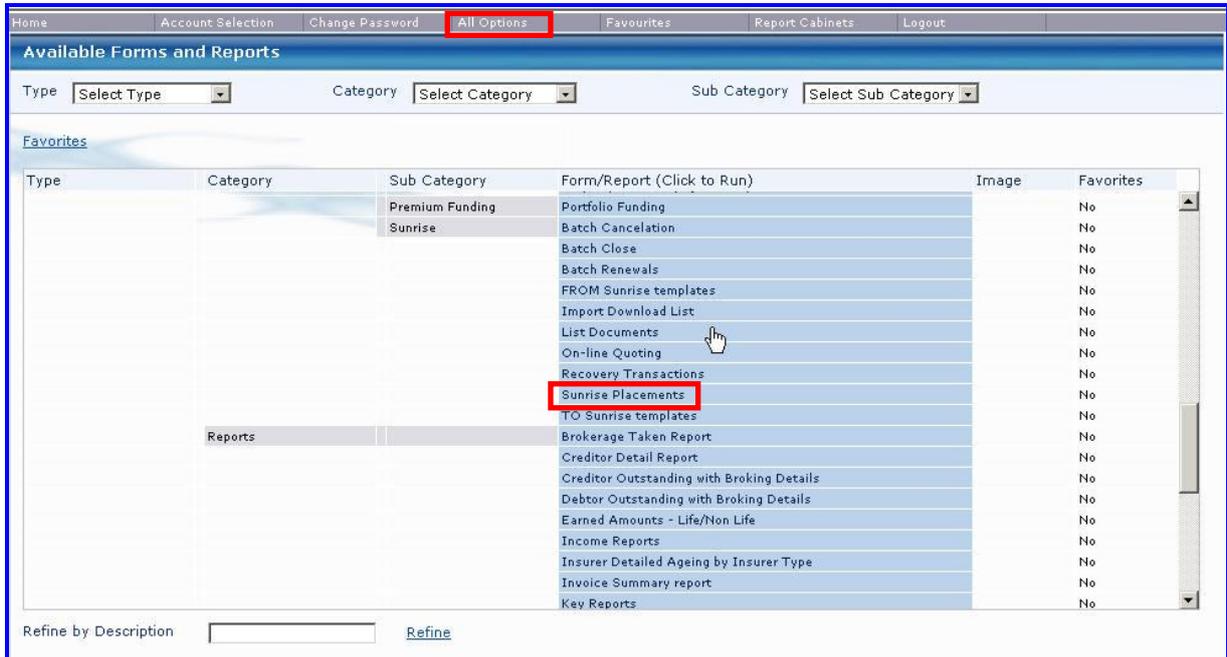
This will invoke the same steps as **Start Quoting** where you can chose to **Process as a Renewal**, or **Covert to a Quote or New Policy**.

## Sunrise Placements

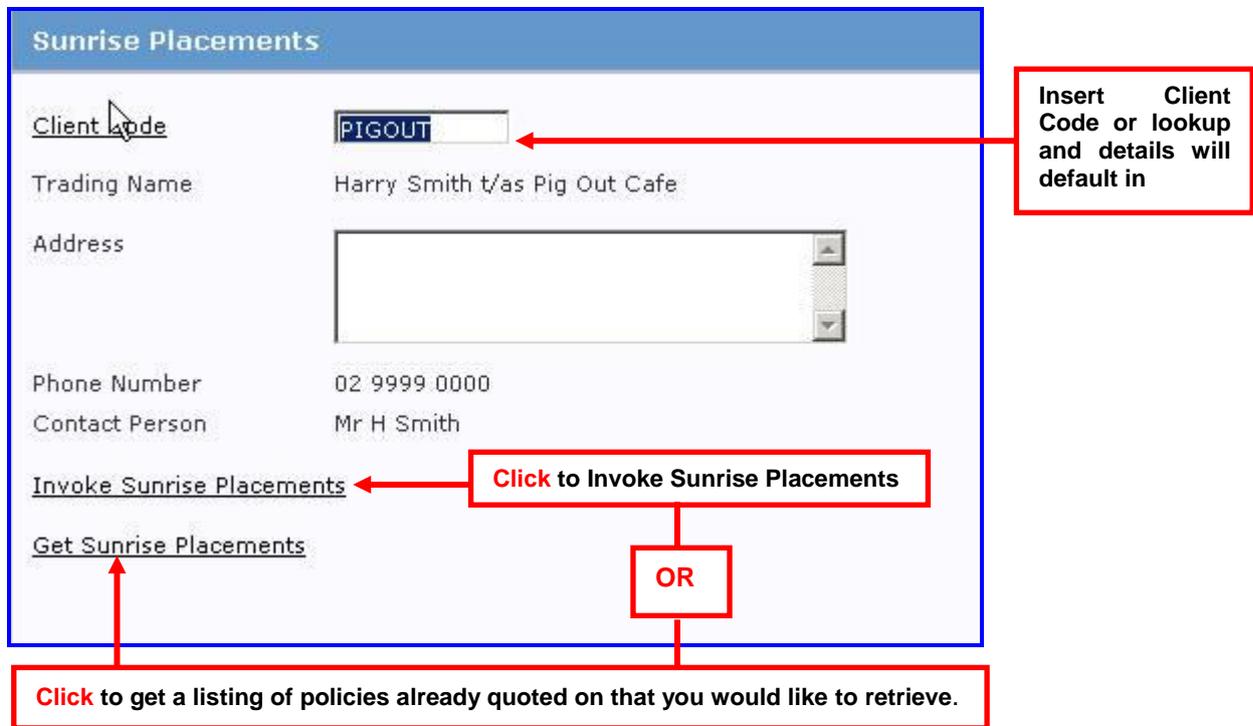
This function allows you to obtain a quote on selected classes on line to the insurers via Telstra eBusiness. The policies created as a result of these quotes will be **MANUAL** policies and no further electronic transactions are enabled.

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

## Chapter 8 - Sunrise



Click on **Sunrise Placements** and the following screen will appear:



## Invoke Sunrise Placements

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

**My Tasks / Overdue [3]**

From	Insured	Product	Message type	Received date	Inception date	Due date
TEBS / CraigL	NEVER SAY NEVER PTY LTD	PIT	Terms	08/10/2007 12:52 PM	12/10/2007	05/10/2007
TEBS / CraigL	<u>Aust Capital Territory Pty Ltd</u>	PIT	Terms	08/10/2007 12:48 PM	01/10/2007	24/09/2007
TEBS / CraigL	<u>JACK ROBBINS</u>	PIT	Terms	08/10/2007 12:43 PM	05/10/2007	28/09/2007

**My Tasks / Received [1]**

From	Insured	Product	Message type	Received date	Inception date	Due date
TEBS / CraigL	<u>Aust Capital Territory Pty Ltd</u>	PIT	Terms	08/10/2007 12:48 PM	01/10/2007	24/09/2007

**My Tasks / Drafts [1]**

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	<u>NEVER SAY NEVER PTY LTD</u>	PIT	Cover Request		12/10/2007	05/10/2007

BAIS Copyright © 2007, Telstra eBusiness Services Pty Ltd Version: 1.2.0-SNAPSHOT Build No: 2201

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 **ibais**.

## 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**

Client Code      PIGOUT

Trading Name      Harry Smith t/as Pig Out Cafe

Address     

Phone Number      02 9999 0000

Contact Person      Mr H Smith

Invoke Sunrise Placements

Get Sunrise Placements

Supplier	Class/Product	Type	Client Name	Start Date	End Date	Attachment Date	Quote Number
TEBS	SPIPI	Bound	Harry Smith t/as Pig Out Cafe	08/10/07	08/10/08	08/10/07	SP-165
TEBS	SPIPI	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 Placements** Previous

Supplier      TEBS

Product      SPIPI

Client Name      Harry Smith t/as Pig Out Cafe

Start Date      15/10/07

End Date      15/10/08

Quote Reference      SP-164

Attachment Date      15/10/07

Memo Number     

Convert to a Quote      Convert to a New Policy      (These options may take some time to process.)

**Memo Number Search**

Insured Name     

Invoice Number     

Policy No     

Risk Description     

Type      Current

Memo number search

You can enter a Memo Number and this will RENEW an existing policy.  
**Please Note:** This will invoke a "Process as Renewal function"

Convert to a Quote or Convert to a New Policy

Search allows you to locate the Memo Number.

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.