



## Sales Quotation System

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### User Manual

### Broker Version

### (Version 6.6.3G)

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## 1. Introduction

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

### Quotation (section 4)

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

### User Maintenance (section 5)

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

## 2. System Login

Step 1: *Method 1*



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

*Method 2*

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

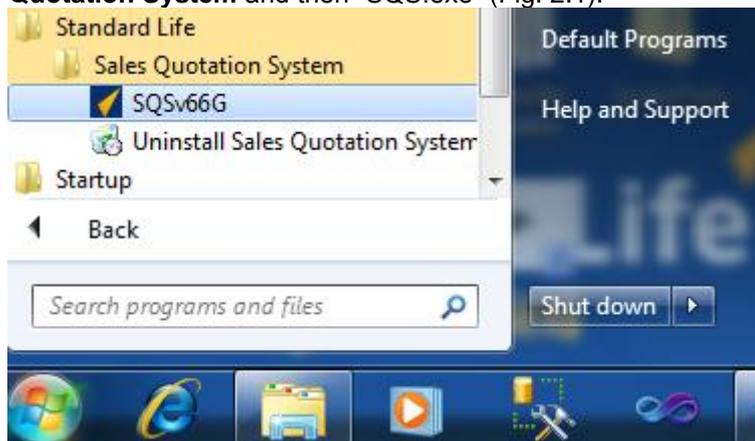


Fig. 2.1 Login Sales Quotation System from Start Menu

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

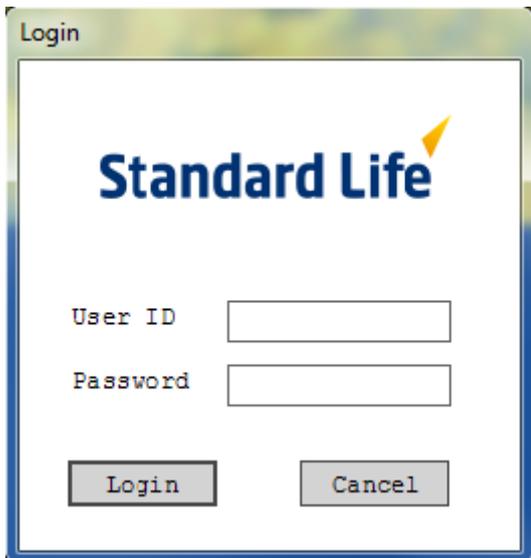


Fig. 2.2 Login screen

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

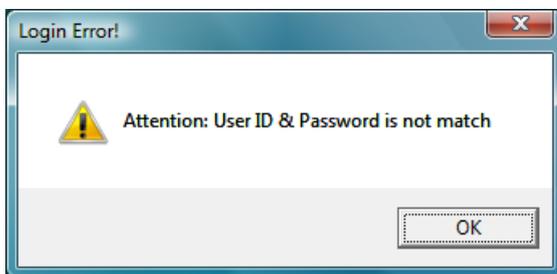


Fig. 2.3 Invalid user ID and password

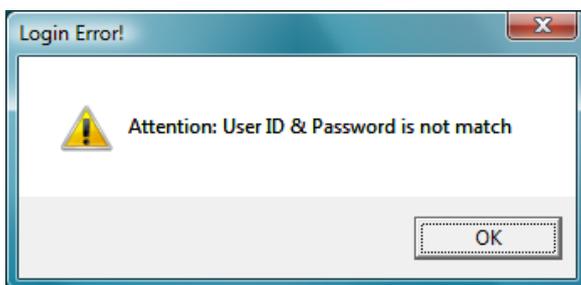


Fig. 2.4 Invalid password

### 3. Main Menu

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

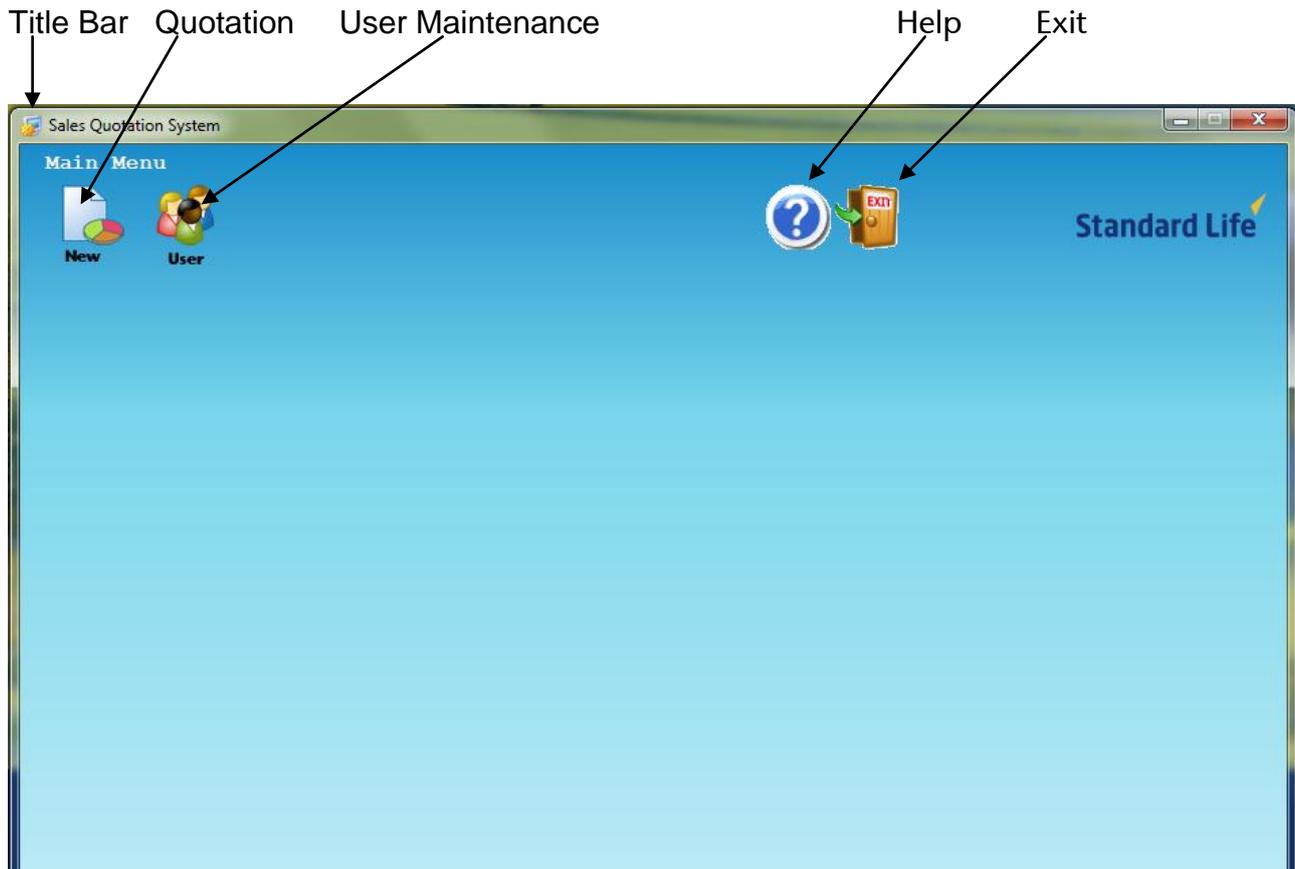


Fig.3.1 Main Menu screen

#### **System Bar**

It displays the system name that you are working on.

#### **Title**

It displays the section that you are working on.

#### **Menu Bar**

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

## 4. Quotation

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

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

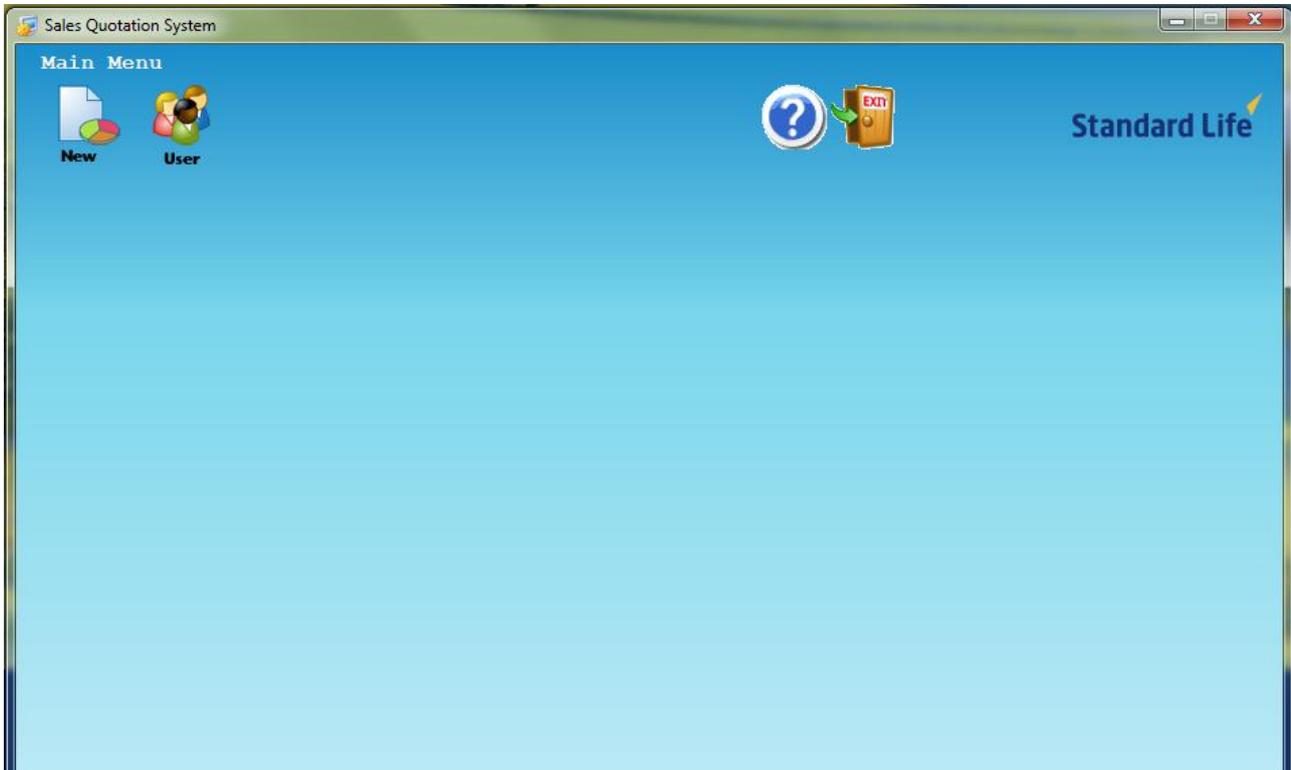


Fig. 4.1 Screen for Quotation

On the Quotation Screen, user can:

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

## 4.1 Create New Quotation

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

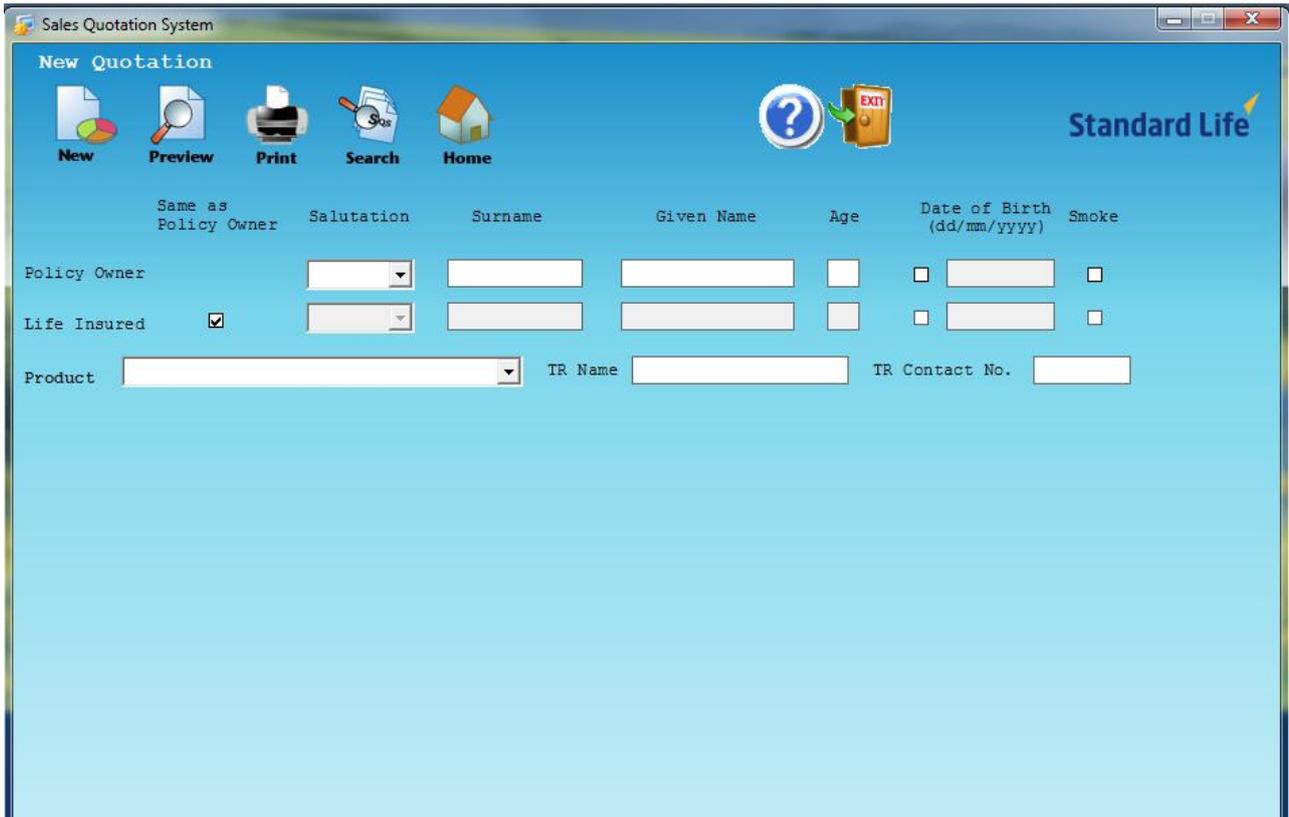


Fig.4.1.1 Creating New Quotation Screen

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

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

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

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

### 4.1.1 Term Product

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

The screenshot shows a software window titled "Sales Quotation System" with a "New Quotation" form. The form is divided into several sections:

- Navigation:** Icons for New, Preview, Print, Search, and Home.
- Policy Owner Information:** Fields for Salutation (Miss), Surname (Wong), Given Name (tester), Age (20), Date of Birth, and Smoke status.
- Life Insured:** A checkbox and similar fields for a second person.
- Product Selection:** A dropdown menu set to "Perpetual Protector", with fields for TR Name and TR Contact No.
- Plan Details:**
  - Policy Term: 10
  - Policy Currency: HKD
  - Payment Frequency: Annually
  - Desired Sum Insured: Input field with a "CALC" button.
- Optional Rider:**
  - Rider-at-Ease: Input field with "CALC" button.
  - Accident Rider: Input field with "CALC" button and a "Class" dropdown.
  - AcciCare Rider: Input field with "CALC" button and a "Class" dropdown.
  - Hospital Cash Rider: Input field with "CALC" button.
  - Critical Illness Lifetime Rider: Input field with "CALC" button.
  - Premium Waiver Rider: Input field with "CALC" button.
- Summary:** "Quotation Summary (Click <Preview> to display the results)" with "Total Amount Payable" set to 0.00.
- Footer:** "Broker Name" field.

Fig.4.1.1.1 Term Product (Perpetual Protector)

**Plan Details:**

**Select:**

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

**Enter:**

- Desired Sum Insured

**Check and Enter:**

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



- 

**Check:**

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

**4.1.3 Unit Linked With Protection Product**

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

The screenshot shows a software interface for creating a new quotation. At the top, there are navigation icons for 'New', 'Preview', 'Print', 'Search', and 'Home', along with a help icon and an 'EXIT' button. The 'Standard Life' logo is in the top right. The main form area is divided into several sections:

- Policy Information:** Fields for 'Same as Policy Owner', 'Salutation', 'Surname', 'Given Name', 'Age', 'Date of Birth', and 'Smoke'. Two rows are provided for 'Policy Owner' and 'Life Insured'.
- Product:** A dropdown menu set to 'LifeMaster', with fields for 'TR Name' and 'TR Contact No.'.
- Plan Details:** Fields for 'Policy Term', 'Premium Term', 'Policy Currency' (dropdown), and 'Payment Frequency' (dropdown).
- Optional Rider:** A list of checkboxes for various riders: 'Rider-at-Ease', 'Accident Rider', 'AcciCare Rider', 'Hospital Cash Rider', 'Critical Illness Lifetime Rider', and 'Premium Waiver Rider'. Each has a 'Sum Insured' field and a 'CALC' button.
- Additional Contribution Account:** A checkbox for 'Scheduled Contribution (Top-up)' with a 'Contribution' field.
- Summary:** A 'Quotation Summary' section with a 'Total Amount Payable' field showing '0.00'.
- Other:** A 'Death Benefit Option' dropdown set to 'Increasing', a 'Withdrawal' button, and a 'Broker Name' field at the bottom.

Fig.4.1.3.1 Unit Linked With Protection Product (LifeMaster)

**Plan Details:**

**Select:**

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

**Enter:**

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

**Check and Enter:**

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

**Check:**

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

**Special Function: Lump Sum Investment Contribution**

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

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

shows in the right down side like Fig 4.1.3.2.

Fig 4.1.3.2

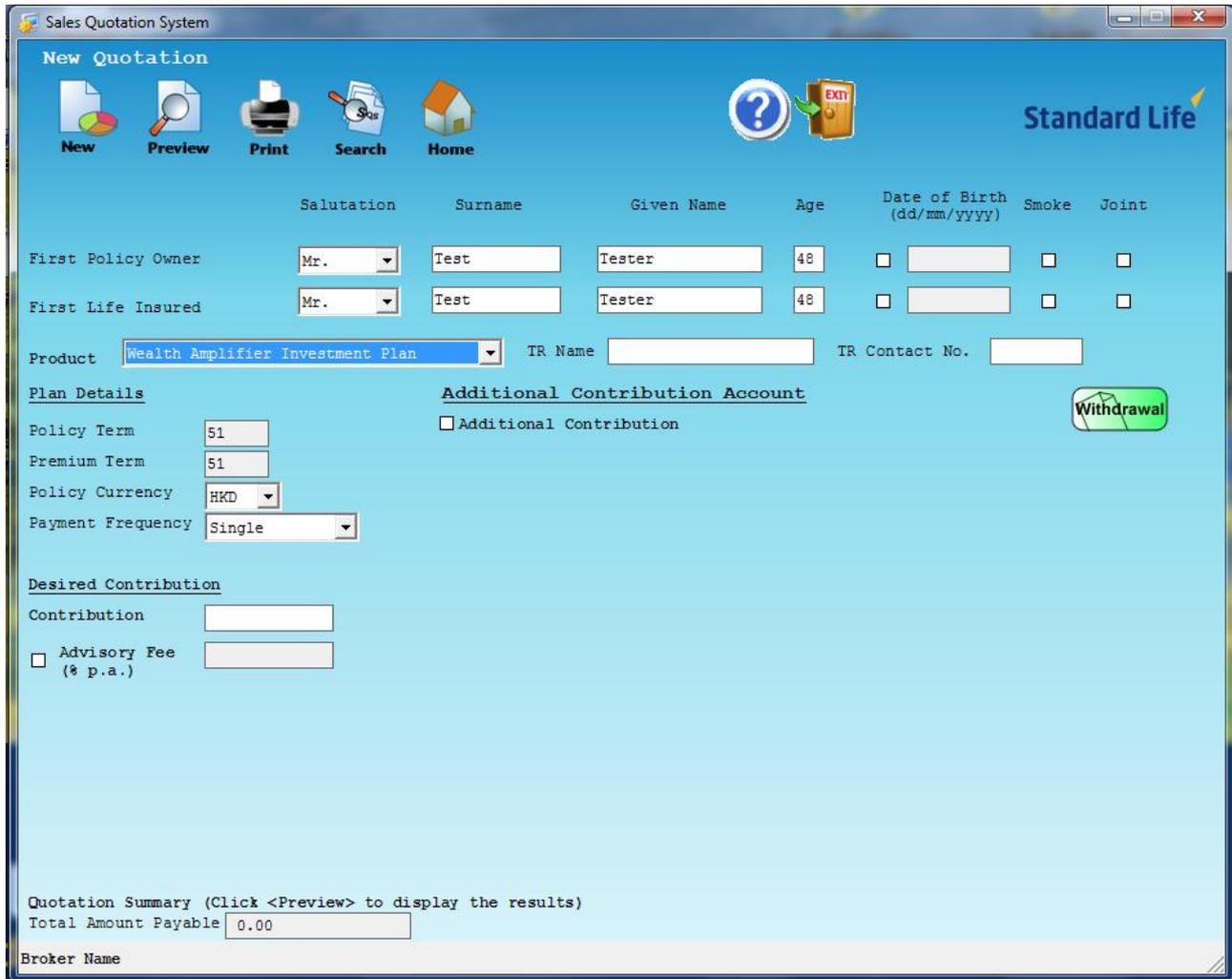
In the Single Top-up dialog, you can enter the number of future year and sum of investment in Top-up that you want to make Lump Sum Investment.

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

\* Can use calculate function  (Section 4.1.5)

#### 4.1.4 Single Investment Product

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



The screenshot shows a software window titled "Sales Quotation System" with a "New Quotation" form. The form has a blue header with navigation icons (New, Preview, Print, Search, Home) and a "Standard Life" logo. The form is divided into several sections:

- Personal Information:** Fields for Salutation, Surname, Given Name, Age, Date of Birth (dd/mm/yyyy), Smoke, and Joint. Two rows are present for "First Policy Owner" and "First Life Insured", both with "Mr." salutation, "Test" surname, "Tester" given name, and age "48".
- Product Selection:** A dropdown menu for "Product" (currently showing "Wealth Amplifier Investment Plan"), and text boxes for "TR Name" and "TR Contact No.".
- Plan Details:** Fields for "Policy Term" (51), "Premium Term" (51), "Policy Currency" (HKD), and "Payment Frequency" (Single).
- Additional Contribution Account:** A checkbox for "Additional Contribution" and a "Withdrawal" button.
- Desired Contribution:** A text box for "Contribution" and a checkbox for "Advisory Fee (% p.a.)".
- Quotation Summary:** A section with the text "Quotation Summary (Click <Preview> to display the results)" and a text box for "Total Amount Payable" showing "0.00".
- Footer:** A field for "Broker Name".

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

**Plan Details:**

**Select:**

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

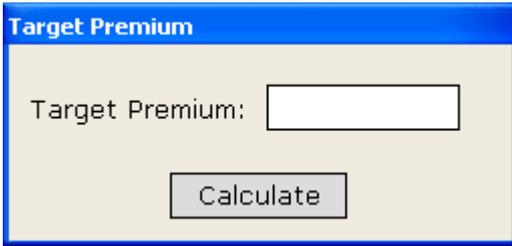
**Enter:**

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

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

### 4.1.5 Use of Calculate Function:

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

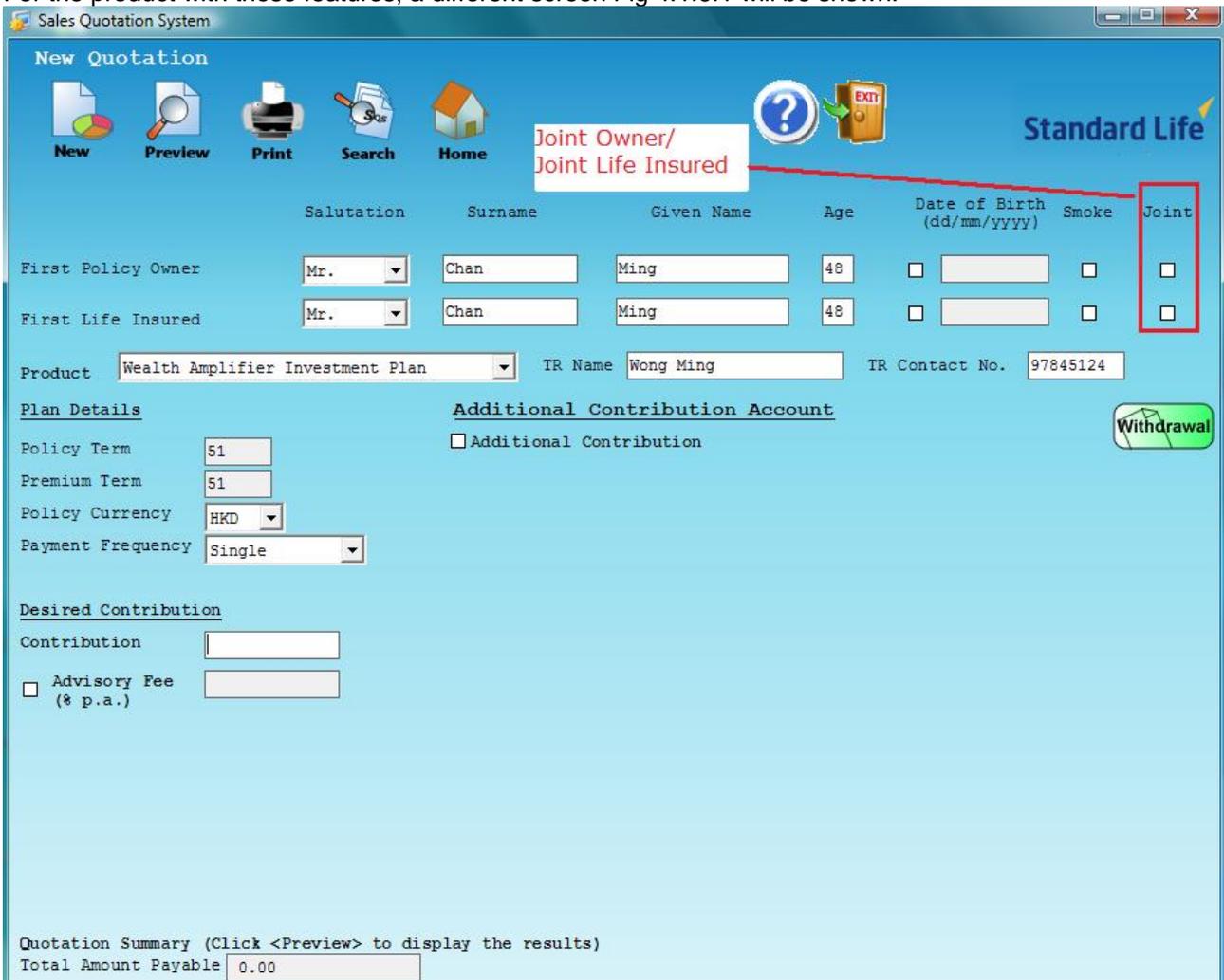


A dialog box titled "Target Premium" with a text input field labeled "Target Premium:" and a "Calculate" button below it.

Fig. 4.1.5.1 Calculate Sum Insured

### 4.1.6 Joint Owner / Joint Life Insured Function:

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



The screenshot shows the "Sales Quotation System" interface for a "New Quotation". It features a navigation bar with icons for New, Preview, Print, Search, and Home. A red box highlights the "Joint Owner/ Joint Life Insured" option. The main form includes fields for policy owner and life insured details, product selection, and contribution settings.

	Salutation	Surname	Given Name	Age	Date of Birth (dd/mm/yyyy)	Smoke	Joint
First Policy Owner	Mr.	Chan	Ming	48		<input type="checkbox"/>	<input type="checkbox"/>
First Life Insured	Mr.	Chan	Ming	48		<input type="checkbox"/>	<input type="checkbox"/>

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

Plan Details: Policy Term: 51, Premium Term: 51, Policy Currency: HKD, Payment Frequency: Single

Additional Contribution Account:  Additional Contribution

Desired Contribution: Contribution: [ ], Advisory Fee (% p.a.):

Quotation Summary (Click <Preview> to display the results)  
Total Amount Payable: 0.00

Fig 4.1.6.1

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

Sales Quotation System

New Quotation








Standard Life

	Salutation	Surname	Given Name	Age	Date of Birth (dd/mm/yyyy)	Smoke	Joint
First Policy Owner	Mr.	Chan	Ming	48	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Second Policy Owner	Miss	Lee	Tai	23	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
First Life Insured	Mr.	Chan	Ming	48	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Second Life Insured	Miss	Lee	Tai	23	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Product: 
 TR Name: 
 TR Contact No.:

Plan Details  
 Policy Term:   
 Premium Term:   
 Policy Currency:   
 Payment Frequency:

Additional Contribution Account  
 Additional Contribution
 Withdrawal

Desired Contribution  
 Contribution:   
 Advisory Fee (% p.a.)

Quotation Summary (Click <Preview> to display the results)  
 Total Amount Payable:

Fig 4.1.6.2

### 4.1.7 Partial Withdrawal Function:

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



For the product with this feature, a button will be shown in the right hand side. Clicking this button, a panel will be shown in Fig 4.1.7.1

The screenshot shows the 'Sales Quotation System' interface. The main form is titled 'New Quotation' and includes fields for policy owners and insureds. A 'Special Quotation' panel is open, showing a 'Withdrawal' checkbox and a 'Close' button. Below the panel, a 'Partial Withdrawal' button is visible. The form also includes a 'Product' dropdown set to 'Wealth Amplifier Investment Plan', 'TR Name' 'Wong Ming', and 'TR Contact No.' '97845124'. The 'Total Amount Payable' is shown as 'HKD 500,000.00'.

Fig 4.1.7.1

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

Withdrawal		
	Year	Amount
▶	1	150000
*		



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

## 4.2 Preview Quotation

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

### Preview

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

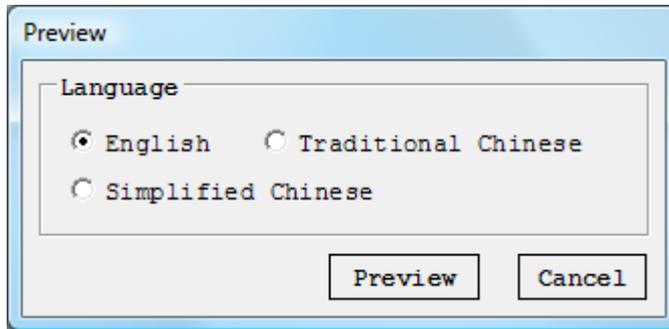


Fig. 4.2.1 Language selection screen

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

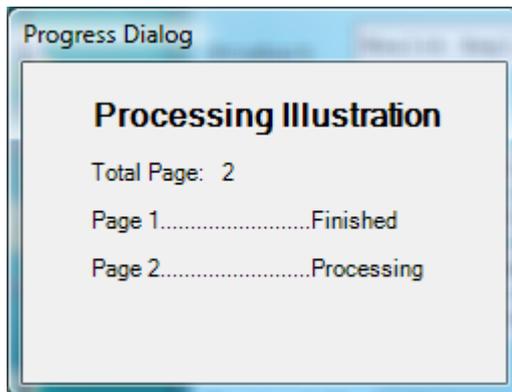


Fig. 4.2.2 Progress Dialog

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

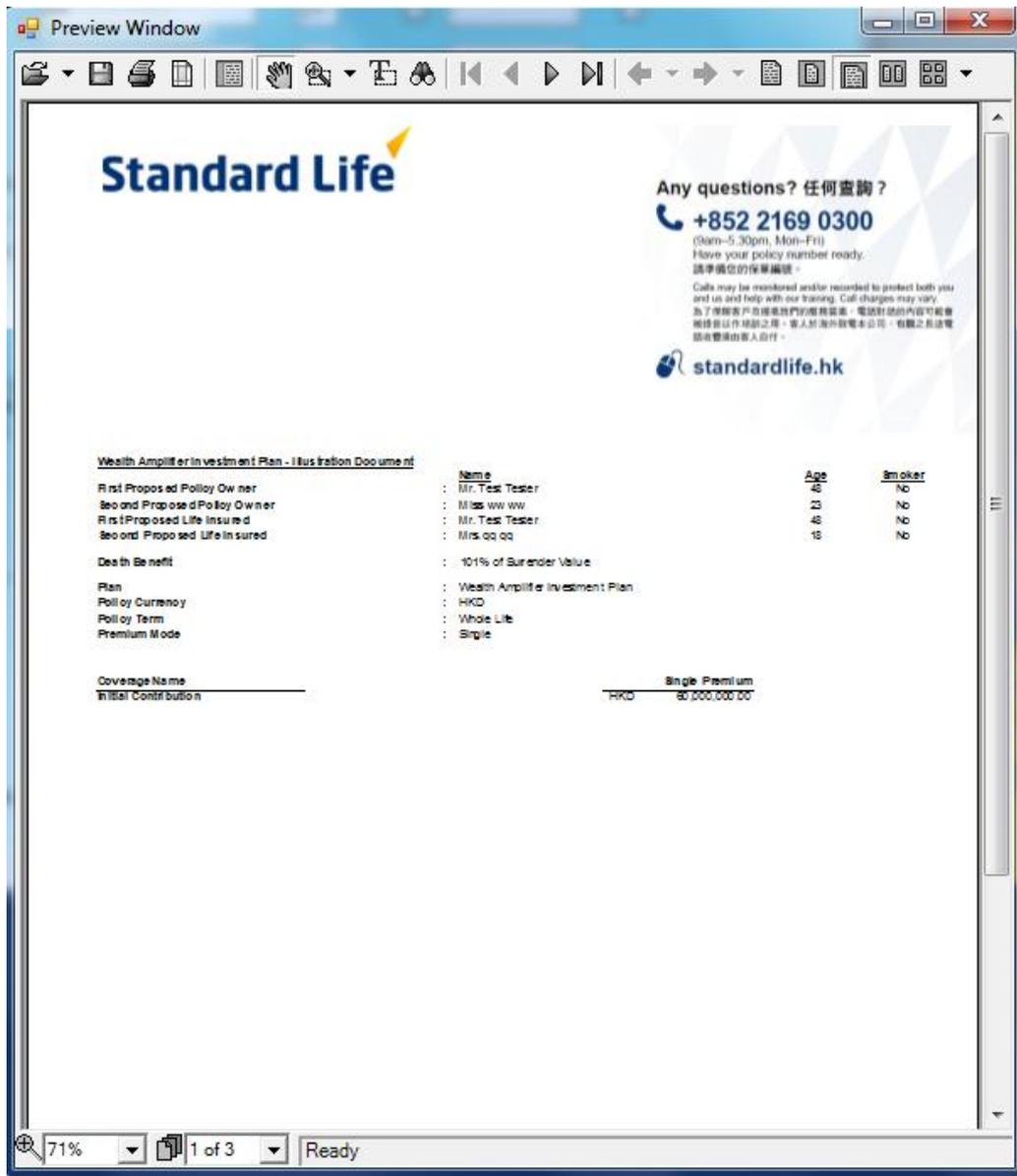


Fig. 4.2.3 Preview window

**Zoom**

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

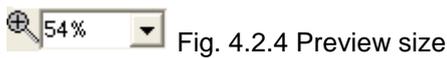


Fig. 4.2.4 Preview size

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



**View different Page**

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



Fig. 4.2.5 Buttons to scroll to previous or next page

**Print** Click  to print the quotation directly.

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

**Close** Click  to quit the preview window.

### 4.3 Print Quotation

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

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

Step 1:



Click the Print icon on the Quotation screen.

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

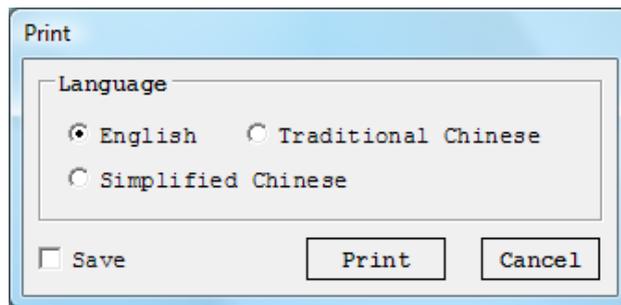
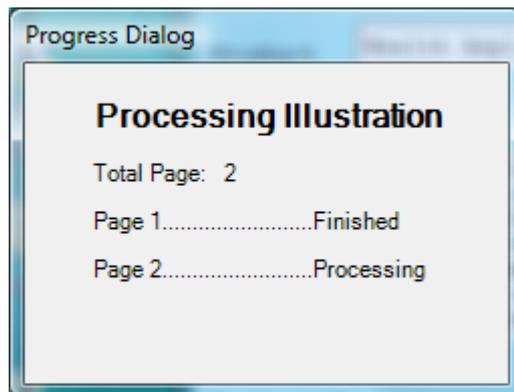


Fig. 4.3.1 Language selection screen

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

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



Then screen Fig.4.3.1 will be prompted up.

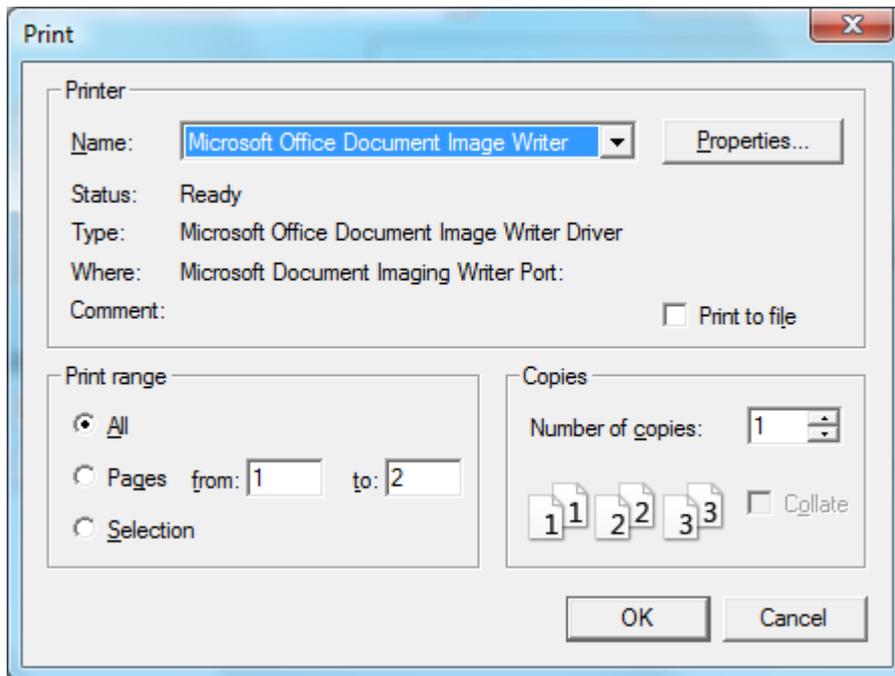


Fig.4.3.1 Print screen

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

#### 4.4 Save the Quotation

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

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

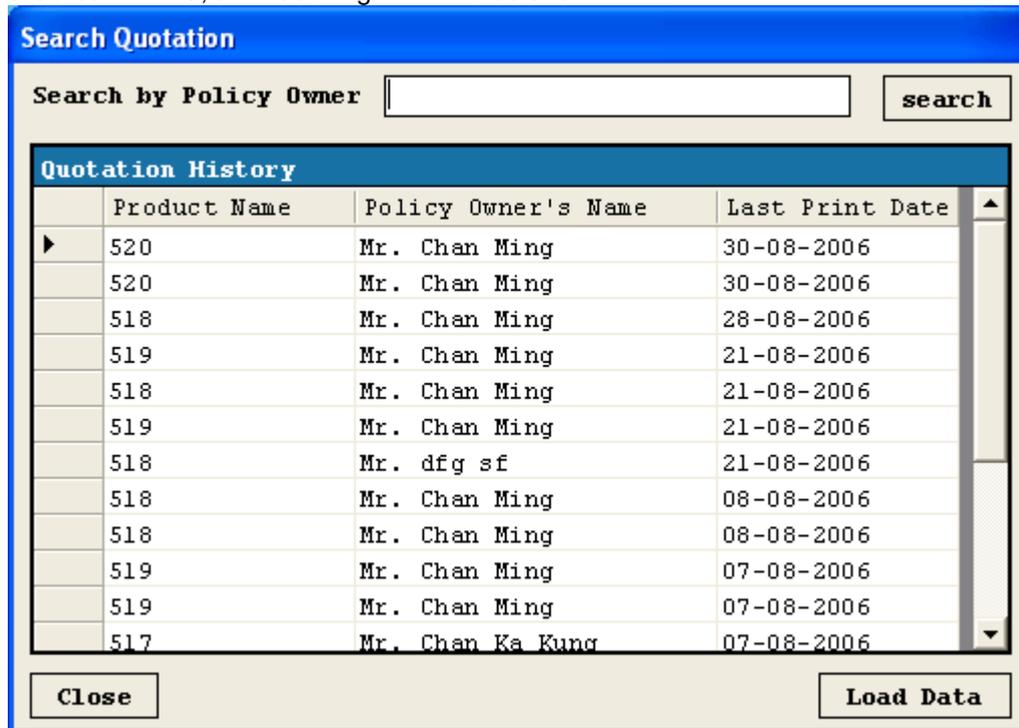


Fig 4.4.1 Search Quotation

User can:

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

#### 4.5 Return to Main Menu

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

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

## 5. User Maintenance

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

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

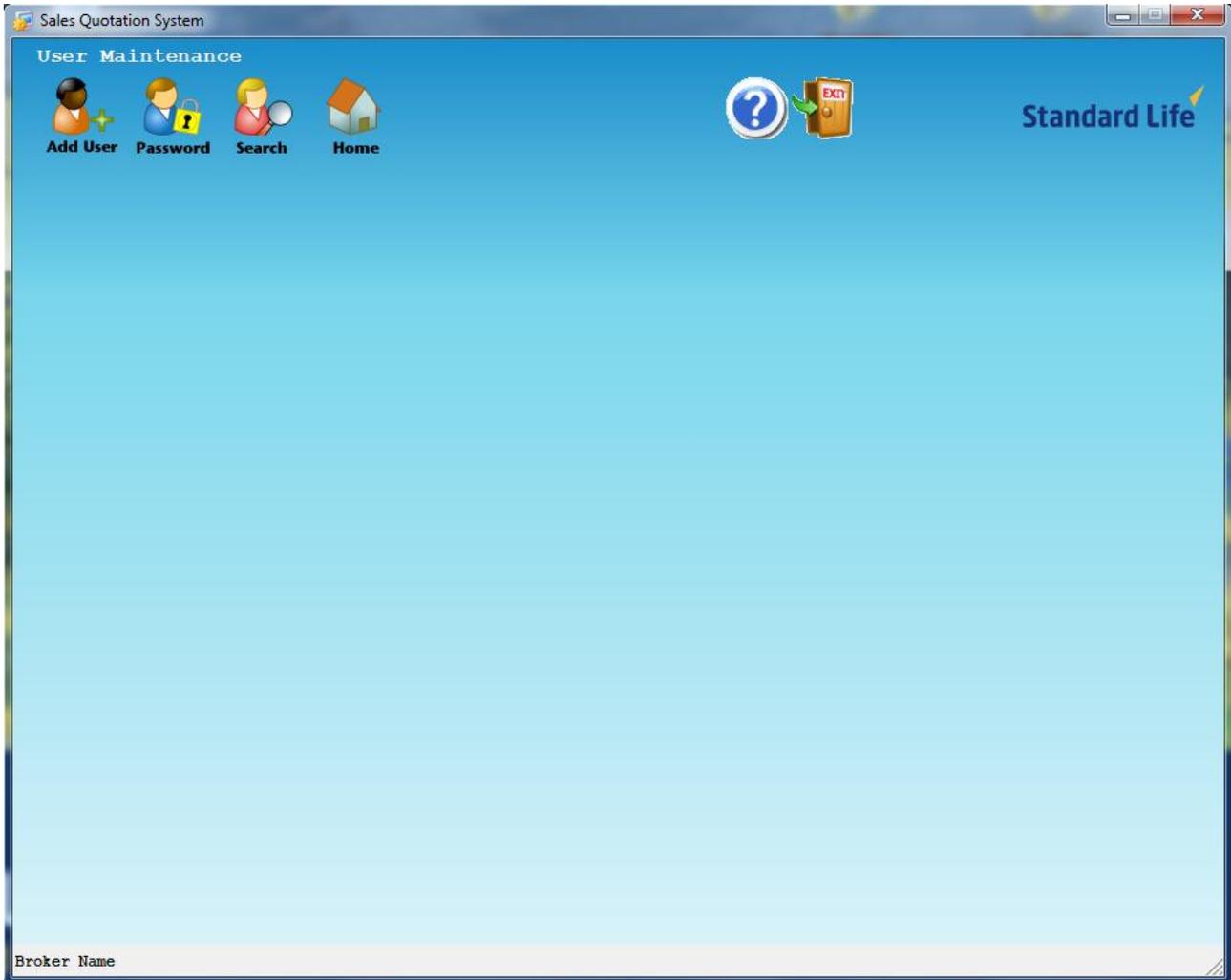


Fig. 5.1 Screen for User Maintenance

On the User Maintenance screen, user can:

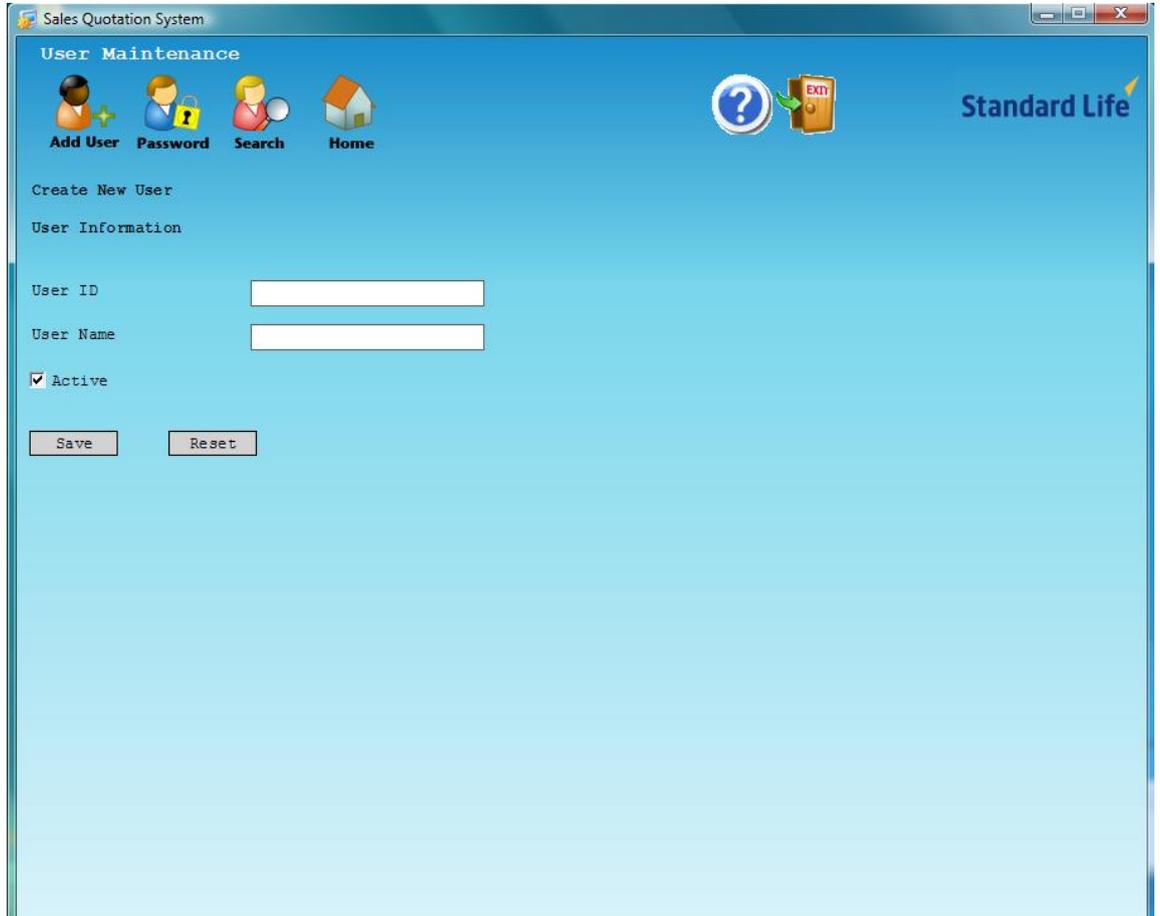
- Create New User (section 5.1)
- Search & Update User Details (section 5.1)
- Change Password (section 5.2)

## 5.1 Create New User

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

Step 1: **Create New User Details**

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



The screenshot shows a web application window titled "Sales Quotation System". The main content area is titled "User Maintenance" and features a navigation bar with icons for "Add User", "Password", "Search", and "Home". Below the navigation bar, the text "Create New User" and "User Information" is displayed. The form includes two text input fields for "User ID" and "User Name", a checked checkbox for "Active", and "Save" and "Reset" buttons at the bottom.

Fig.5.1.1 Create new user screen

Step 2: Enter New User details.

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

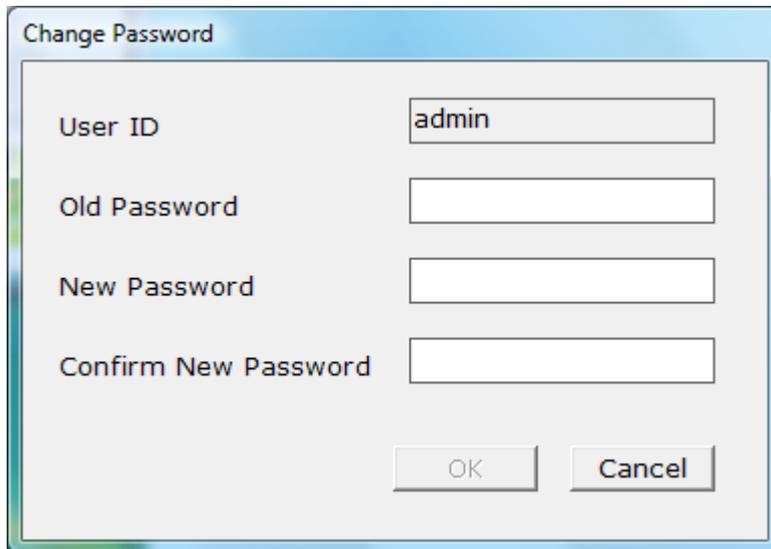
Step 4: Click <Save> for saving record.

## 5.2 Change Password

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

Step 1:

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



The image shows a 'Change Password' dialog box with a light blue title bar. It contains four text input fields: 'User ID' (with 'admin' entered), 'Old Password', 'New Password', and 'Confirm New Password'. At the bottom, there are 'OK' and 'Cancel' buttons.

Fig.5.2.1 Change password screen

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

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

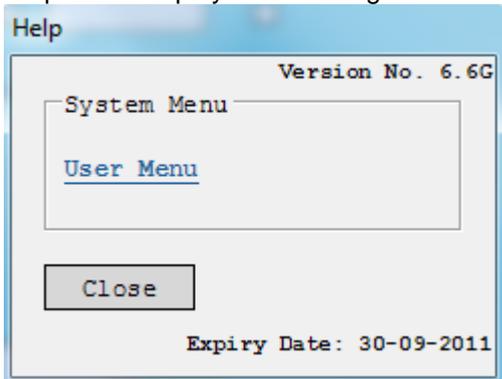
Step 3: Enter New Password twice. The new password must be different from the existing password.

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

## 6. Help Menu



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



Section 1: System Menu

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

## 7. Exit



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