



Suncorp



POSitive User Manual Personal Lines Module Version 12.01.1



Table of Contents

1. Introduction to the Personal Lines Module	3
1.1 System Requirements.....	3
1.2 Launching the Personal Lines Module.....	4
2. Motor Vehicles.....	7
2.1 Motor Vehicles New Quote	7
2.1.1. Motor Vehicles Tab	7
2.1.2. Listed Drivers Tab	8
2.1.3. Details Tab	11
2.1.4. Previous History Tab	14
2.1.5. Insured Details Tab	18
2.1.6. Completing a new Motor Vehicle Quote	19
2.2 Motor Vehicles Modify/Delete Existing Quote	20
2.2.1. Existing Quotes – Modify.....	20
2.2.2. Existing Quotes - Delete.....	21
3. Personal Lines Main Screen Options.....	22
3.1.1. Policy Information.....	22
3.1.2. Assign Policy Number	22
3.1.3. Refer to Suncorp Metway	23
3.1.4. Insured	23
3.1.5. Premium	23
3.1.6. Print.....	23
3.1.7. Q (QuickQuote)	24
3.1.8. Miscellaneous Buttons	24

1. Introduction to the Personal Lines Module

The Personal Lines Module is used to create, maintain and modify quotes and policies for both Personal Home and Personal Motor customers.

This manual provides a step-by-step process of how to generate a Personal Motor Vehicle quote using the POSitive Personal Lines Module.

Note: Effective on the release of POSitive 11.02, Positive will only allow the quoting and issuing of Personal Lines Comprehensive Motor New Business.

Extra & Third Party Property Motor vehicle Quoting functionality have been removed.

1.1 System Requirements

Recommended

Processor	At least 350 MHz Intel® Pentium II (or equivalent)
Monitor fonts	At least 256 colour SVGA video; 1024x728 resolution with small
Operating System	Microsoft® Windows XP Service Pack 2
Memory	512 MB of RAM

Minimum

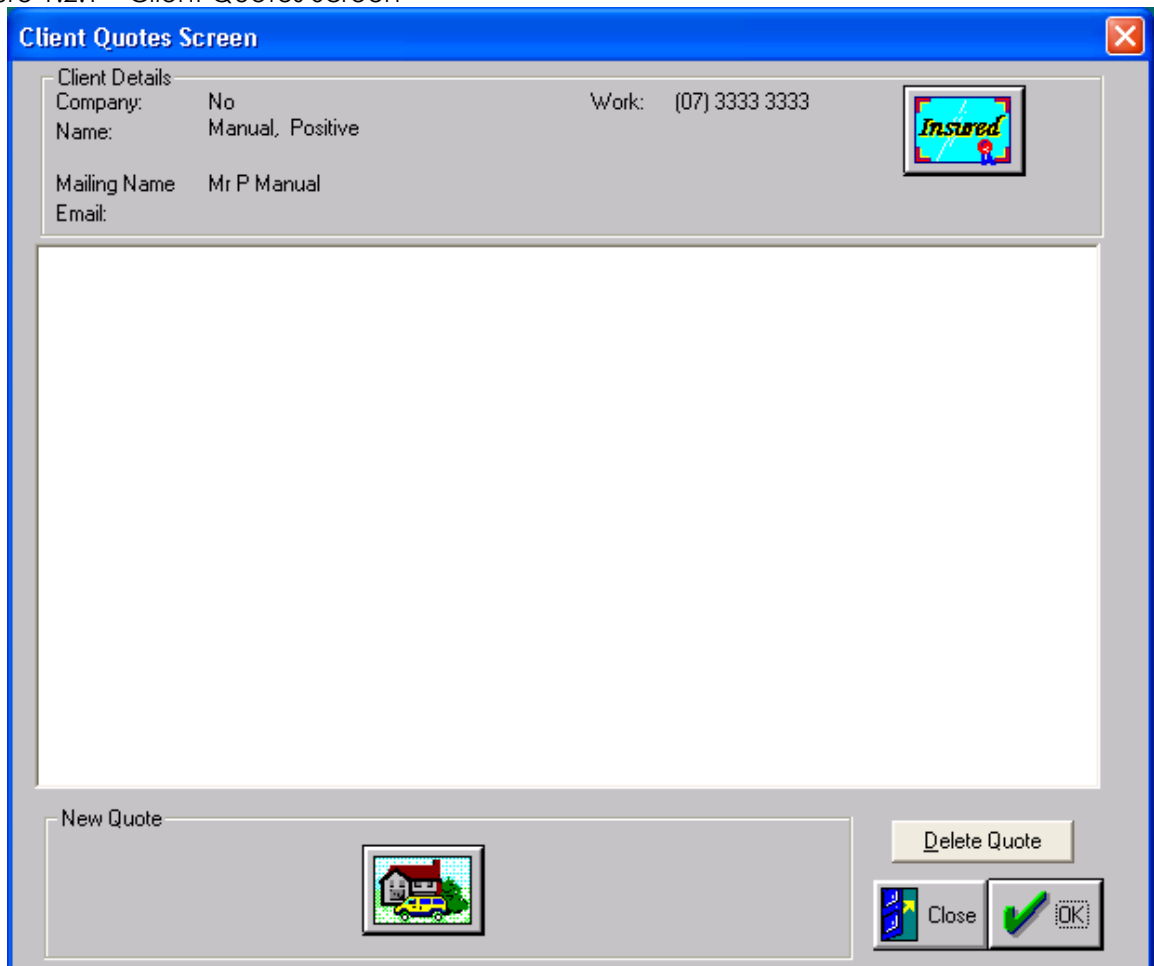
Processor	200 MHz Intel® Pentium (or equivalent)
Operating System	Microsoft® Windows 2000/XP
Memory	128 MB of RAM
Hard Disk	100 MB of disk space for POSitive installation
CD-ROM Drive	2 x CD-ROM
Internet Connection	Broadband or Dial-up connection
Internet Browser	MS Explorer 5.5 or higher
Printer	MS Windows 98/Me/2000/XP

1.2 Launching the Personal Lines Module

The Personal Lines Module is accessed via the Client Module from the Client Quotes Screen, Figure 1.2.1.

NOTE: For further information on setting up new Clients, refer to the Suncorp POSitive User Manual - POSitive Client.

Figure 1.2.1 – Client Quotes Screen



- Select the Personal Lines button at the bottom left of the Client Quotes Screen

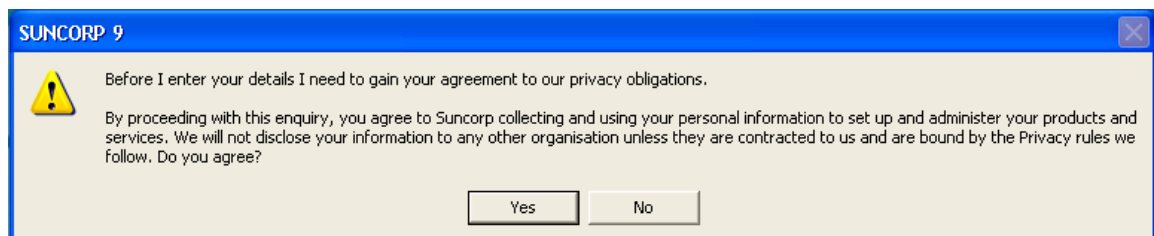


Figure 1.2.2 – Privacy Agreement

- Read the Privacy Agreement to the Client (as depicted above))
- Select 'YES' on Client's agreement

NOTE: If Client does not agree with the Privacy Agreement, it is not possible to provide a quotation.

The user is able to provide the Client with a new quote for motor (Refer to Section 2)

The Period of Insurance Screen will now be displayed

Figure 1.2.4 – Period of Insurance Screen

The screenshot shows a software window titled 'Personal' with 'SUNCORP' in the top right corner. Below the title bar, there are two tabs: 'Lines' and 'Period Of Insurance', with 'Period Of Insurance' being the active tab. The main area contains several input fields: 'Inception Date' with the value '08/07/2010', 'Expiry Date (4pm on)' with the value '08/07/2011', and a section titled 'Calculate Expiry Date from Inception Date' which includes 'Number of Days' (365) and 'Number of months' (12). At the bottom, there are three buttons: a 'Help' button with a question mark icon, a 'Cancel' button with a red X icon, and an 'OK' button with a green checkmark icon.

- Enter the Inception Date as the date that the Policy is to start
- Enter the Expiry Date as the date that the Policy is due to expire (This field is not available to Motor Dealers)

NOTE: Both the Inception Date and Expiry Date fields can be manually changed if required. The Number of Days & Number of Months fields are automatically calculated from the entered Inception & Expiry dates.

- Select 'OK'

From the Other Policies Screen, figure 1.2.5

- Select how many other policies the client may have with Suncorp.

Figure 1.2.5 – Other Policies Screen

The screenshot shows a software window titled 'Personal' with 'SUNCORP' in the top right corner. Below the title bar, there are two tabs: 'Lines' and 'Other Policies', with 'Other Policies' being the active tab. The main area contains a text prompt: 'Including this Quote / Application how many policies do you have with Suncorp Insurance?'. Below this prompt is a dropdown menu showing '0 to 2'. At the bottom right, there is an 'OK' button with a green checkmark icon.

- Select 'Ok'

The Personal Lines Main Screen will now be displayed.

NOTE: Throughout the Personal Lines Module, the 'Cancel' button will return you to the previous screen.

Figure 1.2.6 - Personal Lines Main Screen

Personal Lines
Setup Help

Manual Positive

New Quotes
Home and Contents
Motor Vehicle

Existing Quotes
Modify
Delete

Miscellaneous
Period of Insurance
Interested Party
Other Policies
Summary
Calculate

Summary
Premium 0.00 + FSL 0.00 + GST 0.00 + StampDuty 0.00 + Fees 0.00 = Payable 0.00

? Policy Information Assign POLICY NUMBER Refer to SUNCORP METWAY Insured PREMIUM PRINT Cancel OK

2. Motor Vehicles

- Select the 'Motor Vehicles' button

2.1 Motor Vehicles New Quote

2.1.1. Motor Vehicles Tab

Figure 2.1.1.1 – Motor Vehicles Screen – Motor Insurance Tab - Type of cover now permanently set to 'Comprehensive'

The screenshot shows the 'Motor Insurance' window with the following sections:

- Tabs:** Motor Insurance (selected), Listed Drivers, NCD Questions, Details, Previous History, Insured Details.
- Cover:** Type of Cover: Comprehensive (dropdown).
- Vehicle Details:**
 - Make: TOYOTA (dropdown), Year: 2011, Transmission: All Types (dropdown), Body: Sedan (dropdown).
 - Model: (dropdown).
 - Insured For: Market Value (dropdown).
 - Debug Information: NVIC.
 - Purchased in the last 3 months? ☐ No ☐ Yes.
 - Any Access/Mods fitted since purchase? ☐ No ☐ Yes.
 - Agreed Value Guide: (input field).
 - Purchase price: \$ (input field).
 - Agreed Value: \$ (input field).
 - Kilometre Reading: (input field).
- Finance:**
 - Please select applicable Finance Type: No Finance (dropdown).
 - Interested Party: (button).
- Options:**
 - Would you like to include cover for a Hire Car after an Event? ☒ No ☐ Yes.
 - Windscreen Option: ☒ No ☐ Yes.
- Payment Option:**
 - Please select the Payment Option: ☒ Annual ☐ Monthly.
- Vehicle Usage:**
 - Purpose of use: Private (dropdown).
- Policy Information:** (button with question mark icon).
- Buttons:** OK, Cancel, Apply, Help.

- Complete all fields that have not been shaded out
- Select 'Listed Drivers' tab

2.1.2. Listed Drivers Tab

Figure 2.1.2.1 – Motor Vehicles Screen – Listed Drivers Tab

The screenshot shows the 'Motor Insurance' application window with the 'Listed Drivers' tab selected. The interface includes a 'Current Driver Information' section with fields for Date of Birth (10/10/1900), Driver Name, Gender (Male/Female), and Driver Number (1). Below this is a checkbox for 'Add Drivers Names at Quote stage' and an 'Options' section with an 'Excess' dropdown set to '\$1150' and 'Named Drivers' radio buttons for 'No' and 'Yes'. A table lists the current driver with columns for Driver ID, Date of Birth, Gender, Driver Name, and Rated status. The table contains one entry: Driver 1, born 13/11/1955, Male, with the name 'Positive Manual'. To the right of the table are buttons for 'Add Driver', 'Modify Driver', 'Delete Driver', 'Save Details', 'Discard Changes', and 'Import Driver List'. At the bottom are 'OK', 'Cancel', 'Apply', and 'Help' buttons.

Driver	Date of Birth	Gender	Driver Name	Rated
1	13/11/1955	Male	Positive Manual	

- Select 'Modify Driver' tab (or Add Driver if another driver is required)
- Enter driver's date of birth and select driver's gender
- Select 'Save Details'
- Select 'NCD Questions' tab

NOTE: Once the 'Listed Drivers' tab has been completed the 'NCD Questions – Disabled' tab becomes 'NCD Questions'

Figure 2.1.2.2 – Motor Vehicles Screen – NCD Questions Tab (When Client is 'Individual')

- Enter the Insured's Years of Driving Experience
- Enter Yes or No to 'At Fault claims' question
- Select NCD at last renewal response from drop-down list provided

The 'Has the Insured held Rating 1 for the past 2 years with their current insurer?' question will appear when a rating of 1-60% is selected in the NCD box. By answering 'No' to this question the following question will appear 'Would you like the maximum NCD protection option?' Select required NCD protection option

- If the Insured's date of birth is less than 25, a rating other than Rating 1-60% is selected from the drop-down list, you have selected 'No' to the question 'Has the Insured had any At Fault accidents in the last 5 years?' and the system has rated the Insured less than a Rating 1 then the Family NCD questions will appear and your answers to these will determine the Insured's eligibility or otherwise, for the Family NCD Discount

The 'Calculated NCD level Rating' will now be displayed at the bottom of the screen.

- Select the 'Details' tab

Figure 2.1.2.3 – Motor Vehicles Screen – NCD Questions Tab (When Client is 'Group', 'Family' or 'Company')

Motor Insurance

Motor Insurance | Listed Drivers | **NCD Questions** | Details | Previous History | Insured Details

NCD

What is the Insured's Date of Birth? 11/05/1986

How many years Motor Vehicle Insurance has the Insured had? 0

Years Driving Experience of Insured? 0

Has the Insured had any At Fault accidents in the last 5 years? ☒ No ☐ Yes

Last 12 Months: 0 In the 2nd Year: 0 In the 3rd Year: 0

In the 4th Year: 0 In the 5th Year: 0

Insured's NCD at Last Renewal? Rating 6 - 0%

Family NCD

Are all Insureds under 25 years of age? ☐ No ☒ Yes

Are any of the Insured's parent's motor vehicles insured with Suncorp? ☐ No ☒ Yes

Calculated NCD Level:

OK Cancel Apply Help

- Enter the Insured's date of birth*-see release notes\help text for assistance in determining which 'Insured' date of birth to enter
- Enter the Insured's Years of Driving Experience
- Select NCD at last renewal response from drop-down list provided

The 'Has the Insured held Rating 1 for the past 2 years with their current insurer?' question will appear when a rating of 1-60% is selected in the NCD box. By answering 'No' to this question the following question will appear 'Would you like the maximum NCD protection option?' Select required NCD protection option

- If a rating other than Rating 1-60% is selected from the drop-down list, you have selected 'No' to the question 'Has the Insured had any At Fault accidents in the last 5 years?' and the system has rated the Insured less than a Rating 1 then the Family NCD questions will appear and your answers to these will determine the Insured's eligibility or otherwise, for the Family NCD Discount

The 'Calculated NCD level; Rating' will now be displayed at the bottom of the screen. Select the 'Details' tab

2.1.3. Details Tab

Figure 2.1.3.1 - Motor Vehicles Screen – Details Tab

The screenshot shows a software window titled "Motor Insurance" with a standard Windows-style title bar (blue with a close button). Inside the window, there is a tabbed interface with five tabs: "Motor Insurance", "Listed Drivers", "NCD Questions", "Details" (which is currently selected), and "Previous History". Below the tabs, there are two input fields: "Vehicle Identification Number" followed by a text box, and "Registration Number" followed by a drop-down menu. The main area of the window contains a section titled "Details" with four questions, each with "No" and "Yes" radio button options and a "Details" button to the right:

- Does the vehicle have any MODIFICATIONS which make it different from the standard manufacturer's specifications? For example, modified suspension or exhaust, increased engine output or body kit. ☒ No ☐ Yes Details
- Does the vehicle have any ACCESSORIES fitted that are not standard for this Make/Model (optional accessories fitted by the Manufacturer or Dealer should be listed)? ☒ No ☐ Yes Details
- Is the motor vehicle roadworthy and undamaged (excluding hail damage)? ☐ No ☐ Yes
- Does the motor vehicle have any existing hail damage? ☐ No ☐ Yes

At the bottom of the window, there are four buttons: "OK", "Cancel", "Apply", and "Help".

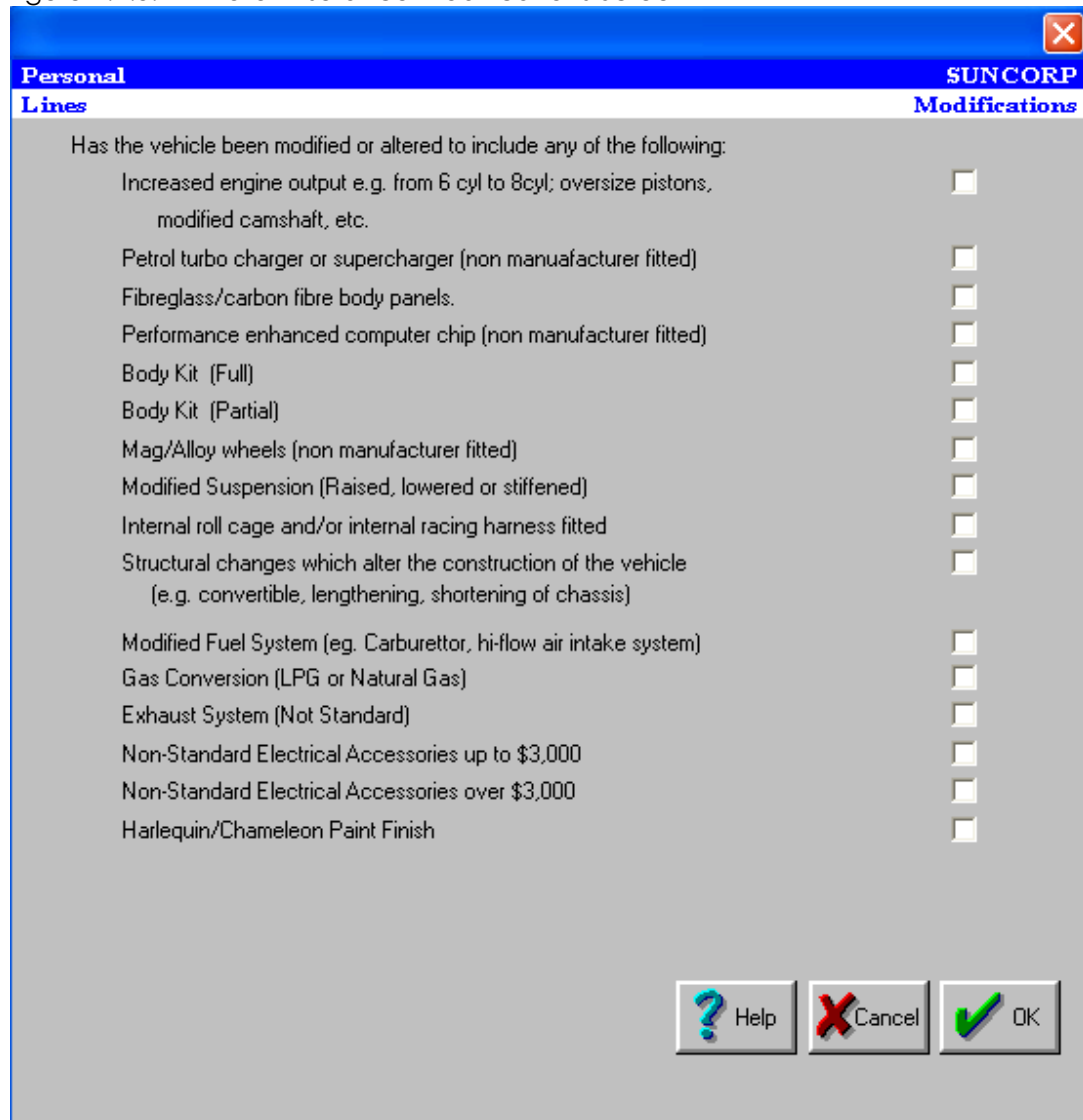
- Enter Vehicle Identification Number or Registration Number
- Select Registration Number or VIN number from drop-down box depending on which data was input above
- Answer all listed questions

NOTE: If the vehicle has modifications, a 'Yes' answer will display Figure 2.1.3.2 – Motor Insurance Modifications Screen

NOTE: If the vehicle has added accessories, a 'Yes' answer will display Figure 2.1.3.3 – Motor Insurance Accessories Screen

- Select the 'Previous History' tab and go to section 2.1.4 – Previous History Tab below

Figure 2.1.3.2 – Motor Insurance Modifications Screen



Personal	SUNCORP
Lines	Modifications
Has the vehicle been modified or altered to include any of the following:	
Increased engine output e.g. from 6 cyl to 8cyl; oversize pistons, modified camshaft, etc.	<input type="checkbox"/>
Petrol turbo charger or supercharger (non manufacturer fitted)	<input type="checkbox"/>
Fibreglass/carbon fibre body panels.	<input type="checkbox"/>
Performance enhanced computer chip (non manufacturer fitted)	<input type="checkbox"/>
Body Kit (Full)	<input type="checkbox"/>
Body Kit (Partial)	<input type="checkbox"/>
Mag/Alloy wheels (non manufacturer fitted)	<input type="checkbox"/>
Modified Suspension (Raised, lowered or stiffened)	<input type="checkbox"/>
Internal roll cage and/or internal racing harness fitted	<input type="checkbox"/>
Structural changes which alter the construction of the vehicle (e.g. convertible, lengthening, shortening of chassis)	<input type="checkbox"/>
Modified Fuel System (eg. Carburettor, hi-flow air intake system)	<input type="checkbox"/>
Gas Conversion (LPG or Natural Gas)	<input type="checkbox"/>
Exhaust System (Not Standard)	<input type="checkbox"/>
Non-Standard Electrical Accessories up to \$3,000	<input type="checkbox"/>
Non-Standard Electrical Accessories over \$3,000	<input type="checkbox"/>
Harlequin/Chameleon Paint Finish	<input type="checkbox"/>

- Populate fields as required
- Select 'OK' to return to the Details Tab

Figure 2.1.3.3 – Motor Insurance Accessories Screen

The screenshot shows a software window titled "Personal Lines" with a "SUNCORP Accessories" header. The main area is a large empty box labeled "Accessories". Below this is a drop-down menu. To the right of the drop-down are four buttons: "Add", "Delete", "Save", and "Cancel". At the bottom left, there is a "Please Note:" section with the following text: "* Accessories marked with an asterisk are automatically included under your policy. Click 'HELP' for a List of Accessories that do not need to be specified." and "If the Accessory or Modification is NOT noted in the listing above, please press HELP". To the right of the note are two buttons: a "Help" button with a question mark icon and a "Close" button with a window icon.

- Select 'Add'
- Highlight Selection from drop-down list
- Select 'Save'
- Select 'Close' to go back to Details Tab

2.1.4. Previous History Tab

- Read the Insurance Reference Service dialog box to the Client as shown in figure 2.1.4.1
- Select 'OK'

NOTE: If the Client does not agree the quotation will not be able to be calculated.

Figure 2.1.4.1 – Insurance Reference Service dialog box

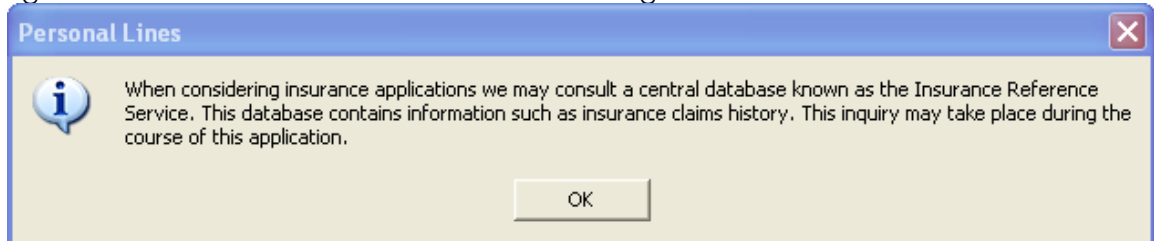
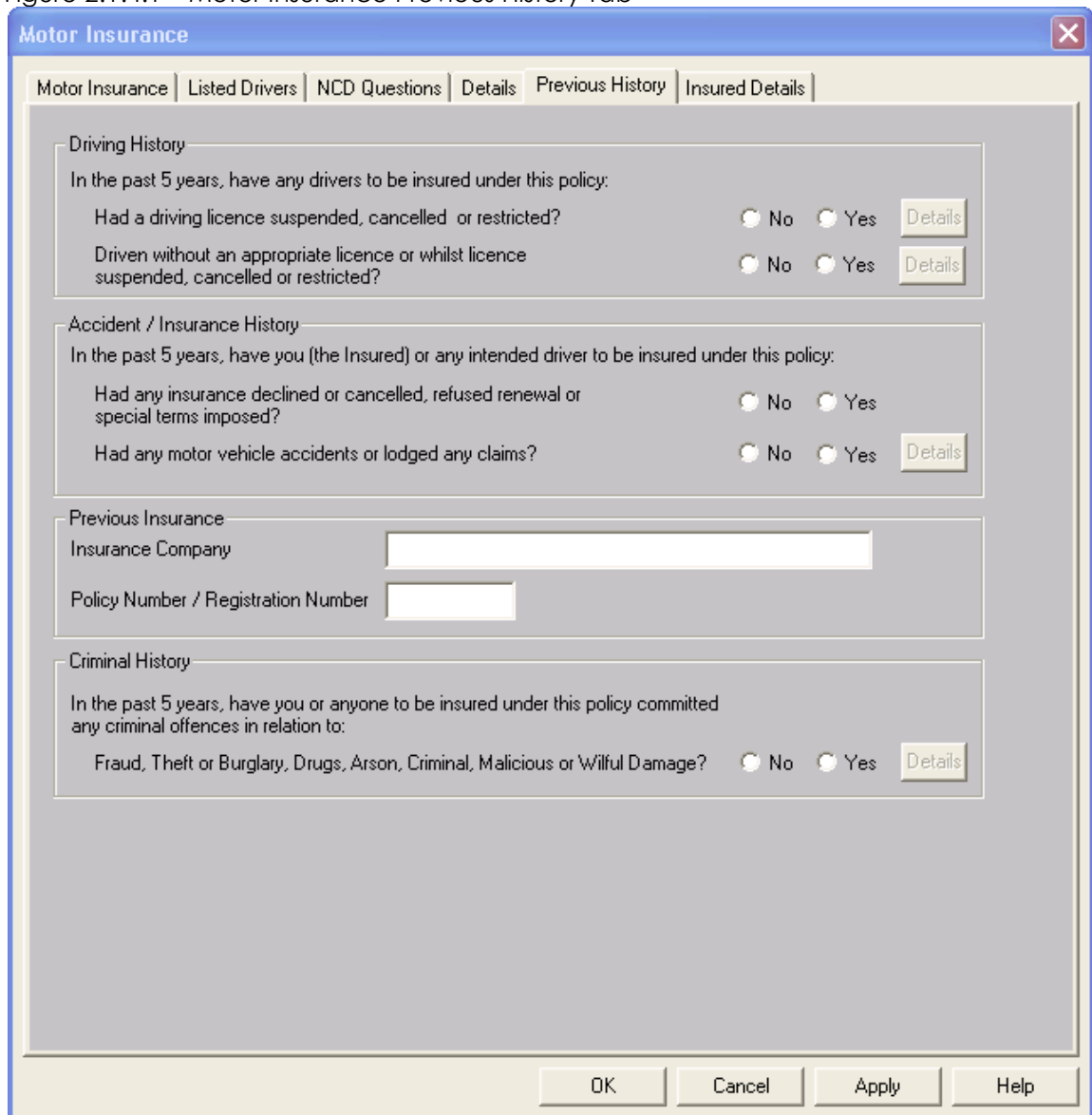


Figure 2.1.4.1 – Motor Insurance Previous History Tab

A screenshot of the "Motor Insurance" application window, specifically the "Previous History" tab. The window has a blue header bar with a close button (X) in the top right corner. Below the header is a tabbed interface with tabs for "Motor Insurance", "Listed Drivers", "NCD Questions", "Details", "Previous History" (which is selected), and "Insured Details". The main content area is divided into four sections: 1. "Driving History": A heading followed by the question "In the past 5 years, have any drivers to be insured under this policy:". Below this are two questions: "Had a driving licence suspended, cancelled or restricted?" and "Driven without an appropriate licence or whilst licence suspended, cancelled or restricted?". Each question has radio buttons for "No" and "Yes", and a "Details" button. 2. "Accident / Insurance History": A heading followed by the question "In the past 5 years, have you (the Insured) or any intended driver to be insured under this policy:". Below this are two questions: "Had any insurance declined or cancelled, refused renewal or special terms imposed?" and "Had any motor vehicle accidents or lodged any claims?". Each question has radio buttons for "No" and "Yes", and a "Details" button. 3. "Previous Insurance": A heading followed by two input fields: "Insurance Company" and "Policy Number / Registration Number". 4. "Criminal History": A heading followed by the question "In the past 5 years, have you or anyone to be insured under this policy committed any criminal offences in relation to:". Below this is a question: "Fraud, Theft or Burglary, Drugs, Arson, Criminal, Malicious or Wilful Damage?". It has radio buttons for "No" and "Yes", and a "Details" button. At the bottom of the window are four buttons: "OK", "Cancel", "Apply", and "Help".

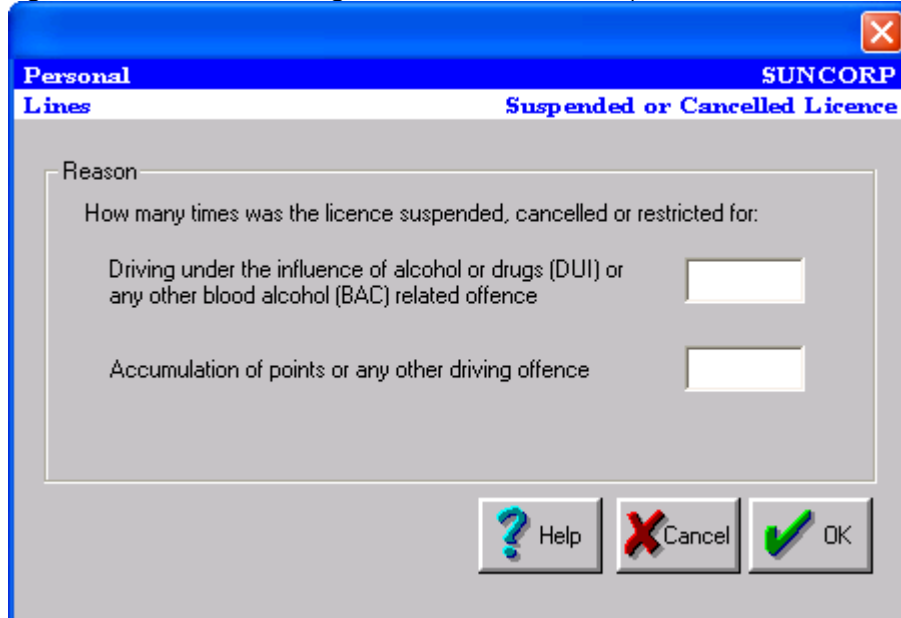
- Answer each Driving History question
- Answer Accident History question
- Complete previous insurance details (if required)

- Answer Criminal History question

NOTE: Answering 'Yes' to any question with a 'Details' button next to it will bring up further screens to complete as detailed below.

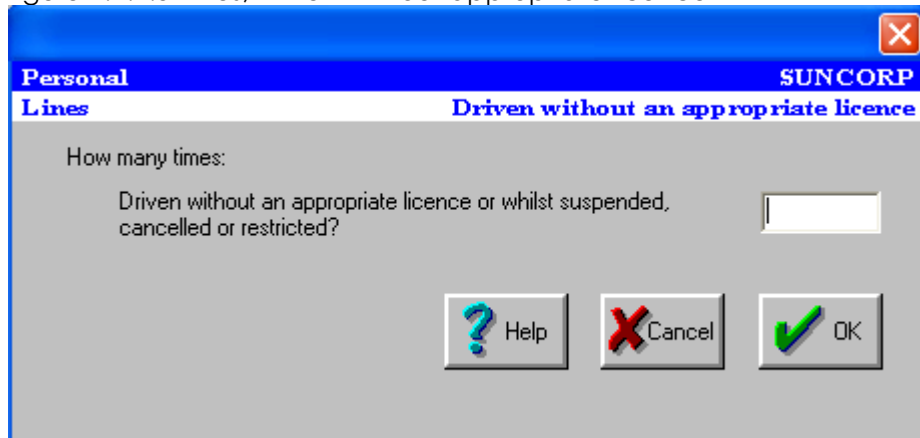
- Select Insured Details tab shown in figure 3.1.5.1 once the additional (if required) screens have been completed and go to section 3.1.5 – Insured Details Tab

Figure 2.1.4.2 – Yes, Driving Licence has been suspended, cancelled or restricted



- Populate relevant field
- Select 'OK' to return to Previous History Tab

Figure 2.1.4.3 – Yes, Driven without appropriate licence



- Confirm how many times this has occurred
- Select 'OK' to return to Previous History Tab

Figure 2.1.4.4 – Motor Claims History Screen

The screenshot shows a software window titled "SUNCORP" with a blue header bar. Below the header, the text "Personal Lines" is on the left and "Motor Claims History" is on the right. The main area contains a table with three columns: "Claim", "Date", and "Amount". The table is currently empty. Below the table, there are three input fields: "Claim/Loss" with a drop-down arrow, "Date of Claim" with a date format "00/00/0000", and "Amount of \$" with a currency symbol. To the right of these fields are five buttons: "Add", "Modify", "Delete", "Save", and "Cancel". At the bottom right, there are two buttons: "Help" (with a question mark icon) and "Close" (with a window icon).

Claim	Date	Amount
-------	------	--------

Claim/Loss:

Date of Claim:

Amount of \$:

Buttons: Add, Modify, Delete, Save, Cancel, Help, Close

- Select 'Add'
- Make selection from drop-down list
- Select 'Save'
- Select 'Close' to return to Previous History Tab

Figure 2.1.4.5 – Motor Criminal History Screen

The screenshot shows a software window titled "Motor Criminal History" with a close button (X) in the top right corner. The window has a blue header bar with "Personal" and "Lines" on the left, and "SUNCORP" and "Criminal History" on the right. Below the header is a table with three columns: "Offence", "Year Of Offence", and "Details". The table is currently empty. Below the table is a horizontal scrollbar. At the bottom of the window, there are three input fields labeled "Offence", "Year Of Offence", and "Details". To the right of these fields are five buttons: "Add", "Modify", "Delete", "Save", and "Cancel". At the bottom right, there are two buttons: "Help" (with a question mark icon) and "Close" (with a window icon).

Offence	Year Of Offence	Details
---------	-----------------	---------

Offence

Year Of Offence

Details

Add Modify Delete Save Cancel

Help Close

- Select 'Add'
- Make selection from drop-down list
- Select 'Save'
- Select 'Close' to return to Previous History Tab

2.1.5. Insured Details Tab

Figure 2.1.5.1 – Motor Insurance Insured Details Tab

Motor Insurance

Motor Insurance | Listed Drivers | NCD Questions | Details | Previous History | **Insured Details**

☒ Client is an Individual
 ☐ Client is an Family
 Existing SUNCORP Client Code (If applicable)

☐ Client is a Group
 ☐ Client is a Company

Name

Given Name(s) * ☐ Male ☐ Female

Surname * Date of Birth

☐ Estate Of

Mailing Address

Mailing Name (eg. Mr J Smith) *

Care Of

Building/Property Name Floor

Street Number (from) (to) Unit Number

Street Name/Postal Service * *

Suburb *

Contact Details

Email Address

Phone No 1 * Phone No 1 Indicator *

Phone No 2 Phone No 2 Indicator

Manual, Positive
266 GEORGE ST
BRISBANE QLD
4000

* Denotes mandatory field

OK Cancel Apply Help

- Confirm all the Client's details are correct
- Select 'Apply'

NOTE: If there is any missing data required by the system, a Warning screen will pop up at this stage.

- Select 'OK'

NOTE: If a further warning screen pops up, click 'X' in the top right hand corner.

The system now returns to the Personal Lines screen – Figure 2.1.6.1 – Motor Insurance Premium Not Calculated

2.1.6. Completing a new Motor Vehicle Quote

Figure 2.1.6.1 – Motor Insurance Premium Not Calculated

The screenshot shows the 'Personal Lines' software window. The main area displays a quote for a 2008 MINI COOPER S JOHNWORKS R56 POSMAN (-PREMIUM NOT CALC). The quote details include the address 266 George St Brisbane 4000. The right-hand sidebar contains buttons for 'New Quotes' (Home and Contents, Motor Vehicle), 'Existing Quotes' (Modify, Delete), and 'Miscellaneous' (Period of Insurance, Interested Party, Other Policies, Summary, Calculate). At the bottom, a summary section shows the following values: Premium 0.00, FSL 0.00, GST 0.00, StampDuty 0.00, Fees 0.00, and Payable 0.00. The bottom toolbar includes buttons for Policy Information, Assign POLICY NUMBER, Refer to SUNCORP NETWAY, Insured, PRINT, a red circular arrow icon, Cancel, and OK.

- Select 'Calculate'

Figure 2.1.6.2 – Motor Insurance Premium Calculated

The screenshot displays the 'Personal Lines' software window. The main area shows a quote for a 2008 MINI COOPER S JOHNWORKS R56 POSMAN with a premium of \$1206.73. The address is 266 GEORGE St Brisbane 4000. The right sidebar contains buttons for 'New Quotes' (Home and Contents, Motor Vehicle), 'Existing Quotes' (Modify, Delete), and 'Miscellaneous' (Period of Insurance, Interested Party, Other Policies, Summary, Calculate). The bottom summary bar shows the calculation: Premium 1044.79 + FSL 0.00 + GST 104.48 + StampDuty 57.46 + Fees 0.00 = Payable 1206.73. The bottom toolbar includes buttons for Policy Information, Assign POLICY NUMBER, Refer to SINCORP METWAY, Insured, PREMIUM, PRINT, a red circle icon, Cancel, and OK.

Summary						
Premium	+	FSL	+	GST	+	StampDuty
1044.79		0.00		104.48		57.46
					+	Fees
						0.00
					=	Payable
						1206.73

- Select 'OK' to return to the Client Quotes Screen (Figure 23)
- Select 'OK'
- Select 'Close' to leave Client record

2.2 Motor Vehicles Modify/Delete Existing Quote

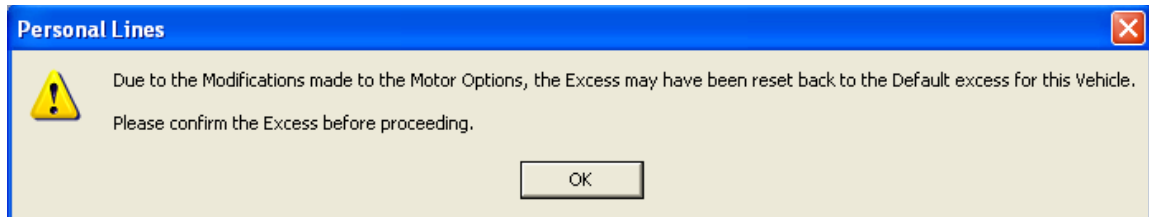
2.2.1. Existing Quotes – Modify

From the Personal Lines screen

- Highlight the quote to be modified
- Select 'Modify'
- Select each tab where data is to be modified
- Update data
- Select 'Apply'

Depending on the data that has been modified, the Excess Reset screen may appear

Figure 2.2.1.1 – Excess Reset warning



- Select 'OK'
- At this stage a Warning window (as detailed previously in section 2.2.5) may appear to either request further information or highlight an anomaly eg. Bull bar added as an accessory
- Select 'OK'
- Close Warning window by clicking on 'X' in top right hand corner
- Select 'OK'

The system will now return to the Personal Lines screen showing that the premium has not been calculated.

- Select 'Calculate'

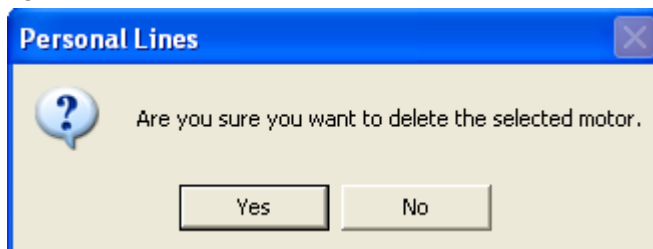
The system will now provide an updated quote calculation.

2.2.2. Existing Quotes - Delete

From the Personal Lines screen

- Highlight the quote to be deleted
- Select 'Delete'

Figure 2.2.2.1 – Delete motor?



- Select 'Yes'

The system will now return to the Personal Lines Main Screen no longer showing the quote that was deleted.

- Select 'OK'

The system will now return to the Client Quotes screen

- Select 'OK'
- Select 'Close' to exit out of the Client's record(s)

3. Personal Lines Main Screen Options

3.1.1. Policy Information

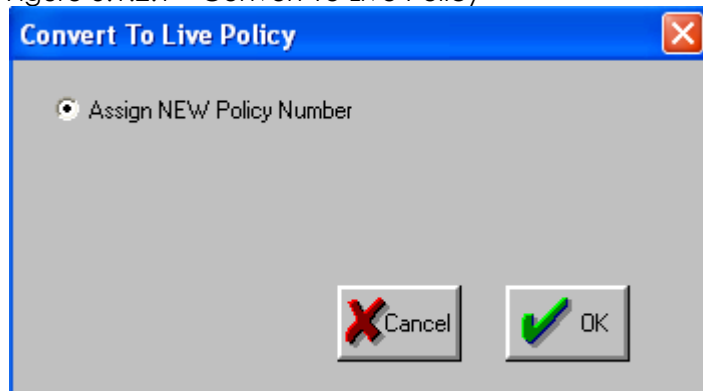
This button provides references to what each Suncorp policy covers.

3.1.2. Assign Policy Number

This button will start the process of converting the Client's quote to a policy.

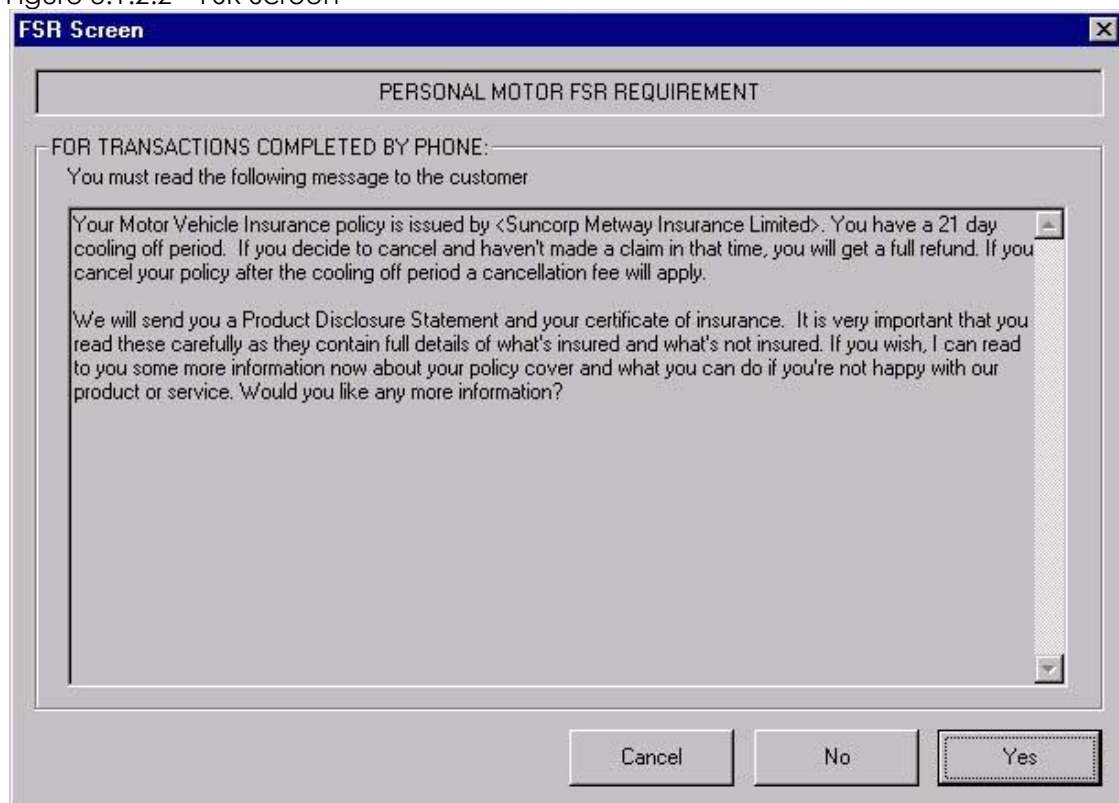
- Select 'Assign Policy'

Figure 3.1.2.1 – Convert To Live Policy



- Select 'OK'
A dialog box will be displayed showing the Policy Number and a disclosure requesting confirmation.
- Select 'YES' to display the FSR Screen, Figure 3.1.2.2

Figure 3.1.2.2 – FSR Screen



- Select 'YES' or 'NO' depending on the Client's response having been read the FSR question
 - 'YES' will cause a dialog box providing basic details of the client's policy to pop-up
 - Select 'OK' to access the 'Choose Document to Print' screen, Figure 3.1.6.1
 - 'NO' to access the 'Choose Document to Print' screen

3.1.3. Refer to Suncorp Metway

Where a risk requires verification and/or referral, this button launches the Personal Lines Authorisation screen.

Enter the Authorisation Code (as supplied over the phone by a Suncorp support officer)

3.1.4. Insured

This button will launch the Insured Details screen for changes to, or completion of, the insurance details

3.1.5. Premium

This button will launch the Adjusted Premium screen (Figure 3.1.5.1) for modification of a premium on both Annual and Monthly policies.

This screen allows the user to apply a discretionary discount up to \$50 (or more with authorisation) to reduce the calculated premium.

Commission can also be adjusted to reduce the premium further. The discount must be done first prior to the commission being reduced

Figure 3.1.5.1

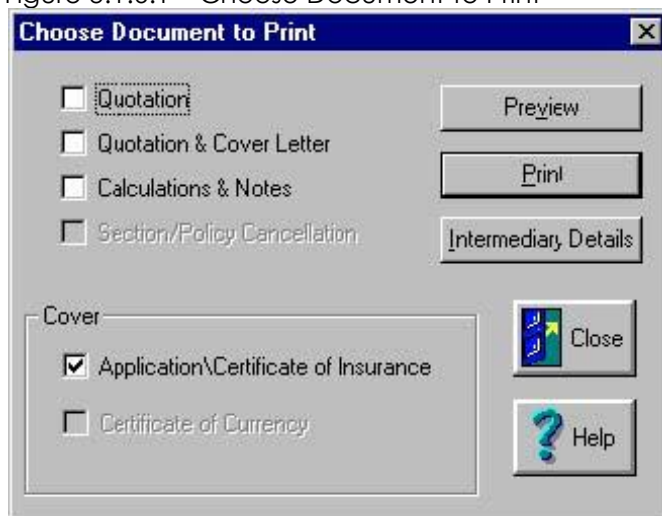
2005 FORD FALCON XT BA MKII DDCOMM					Premium Totals
Calculated Premium	Commission	Discount %	Loading %	Adjust Premium	
604.26	57.54			0.00	604.26
					0.00
					0.00
Section SubTotal					604.26
Other Risks					0.00
Broker Fee					
	%	\$	GST		
0		0.00	0.00		0.00
Total All Risks					604.26

To adjust the premium, press 'Allow Discount' and enter the single use code supplied to you by your Suncorp support consultant.

After you have entered the correct code, enter the full desired new premium in the Adjust Premium field.

3.1.6. Print

Figure 3.1.6.1 – Choose Document to Print



3.1.7. Q (QuickQuote)

This button converts the mode of use of Personal Lines for Full Quote mode (default) to the QuickQuote mode.

3.1.8. Miscellaneous Buttons

Period of Insurance

This button allows modifications to be made to the insurance period.

Interested Party

Selecting this button allows for changes (additions/deletions) to an interested party.

If the listed party has more than one branch each branch will be listed under 'Branch Details' and the correct branch can be selected from here.

If the required party does not appear within the 'Institution' list

- Remove the tick from 'Listed Institution' box
- Complete all details on the resulting form

Summary

This button shows a breakdown of the quote as depicted at the bottom of the Personal Lines screen.

<End of POS Personal Lines User Manual>