



integrated broking system

Quote Manual

GPM Development Limited

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General Guidance/Notes

1. Most ibs screens contain multiple Menus and a Toolbar. The Toolbar typically contains the most frequently used functions from the Menus.
2. The ibs desktop may be resized to the user's requirement using standard Microsoft Windows actions.
3. Various business functions within ibs may be accessed in different ways. Not all routes are included in this manual.
4. Various functions and behaviours within ibs are controlled by configuration settings and user permission settings. Not all configuration variations are detailed in this manual.

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1. Create a Quote

To create a new quote, press the Quote icon on the desktop toolbar to display the Quote Search screen and then press **New** on the Quote Search screen (*alternatively select the **Create Quote** option on the Quotes menu*).



Quote Search

Quote Number:		UMR:	
(Re)Insured:			
Client Code:		...	
Post Code:			
Department:	C - Commercial ▼		
Sub Division:	All ▼		
Class of Business:	All ▼	All Cobs	☐
Account Executive:	All ▼	All AE	☐
Producer:	All ▼	All Prod	☐
Date:	06 Jun 2025 to 06 Jun 2025		
Status:	▼		
Re:			
Original Insured:			
Include Firm Orders:	☐		
Include Quotes NTU:	☐		
Insurer Reference:			
Connection:	All ▼		

Search **New** Favourites Recent Used Close

New quotes will be created in the currently selected Department.



1.1. Quote Details

Quotes

File View Diary Documents E-Mail Copy Quote Help Favourites Exit

Details Insurers FCA Prev Status & date

Quote Number: 01366 UMR: Date: 06 Jun 2025 Time: 08:50

Client/Agent Code: Multi/Syn Clients

Name:

Address:

E-Mail:

Contact Name:

Telephone No: Fax No:

Root Number:

Policy Wording: Wording

Assured Code:

(Re)Insured:

Class of Business:

Account Executive: Re:

CCY & Premium: Producer:

Sub Division: Status:

Sum Insured: Stats Code:

Details:

Update Create/Amend Doc. Extract Sums Insured Firm Order Close

The quote number, date and time will be automatically generated. The remaining fields may be completed as follows.

UMR

A Unique Market Reference may be manually entered. The UMR value must follow the standard market structure i.e. BnnnnXXXXXXXXXXXX where nnnn is a broker number and XXXXXXXXXXXX is a maximum of 12 alpha/numeric characters. On first saving a new quote, ibs will attempt to construct a UMR using the risk number.

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Client/Agent Code

Enter the Code for the Direct Client or Agent. To search for a client code, use the Search function.

The 'Client Search' dialog box contains the following fields and controls:

- Client Code:** A text input field.
- Name:** A text input field.
- Type:** A dropdown menu.
- Contact Name:** A text input field.
- Search:** A button at the bottom left.
- Close:** A button at the bottom right.

Select the required client from the search results. Alternatively create a new Direct Client account by pressing **New** on the search results screen (*alternatively select the **Create Assured** option on the File menu*).

The 'Account Code Update' dialog box features a tabbed interface with the following sections:

- Account Details:**
 - Code:** Text input (pre-filled with 'D').
 - Account Type:** Dropdown menu.
 - Short Name:** Text input (pre-filled with 'Business / Trade').
 - Account Code:** Text input and dropdown menu.
 - Directory Name:** Text input.
 - Geographic Area:** Dropdown menu.
 - Parent:** Checkboxes for 'Parent Account' and 'Parent'.
 - Brokerage Sharing a/c:** Checkboxes.
 - Currency:** Dropdown menu.
 - Syndicate Details:** Sub-section with 'Account Type' dropdown, 'Illinois Ind.' checkbox, and 'Authorised' checkbox.
 - US Approved:** Checkbox.
- Account Name:** Text input.
- Address Line 1:** Text input.
- Address Line 2:** Text input.
- Address Line 3:** Text input.
- Address Line 4:** Text input.
- Post Code:** Text input.
- Country:** Dropdown menu.
- Telephone No:** Text input.
- Mobile No:** Text input.
- Contact Name:** Text input.
- E-Mail Address:** Text input.
- Additional Info:** Large text area.
- Sanction Date:** Text input.
- Sanction User:** Text input.
- Statement Email:** Text input.

At the bottom, there are buttons for **Update**, **Export** (with an Excel icon), and **Close**.

For a new Direct Client, enter the Account Name and the Address. A Code value will be automatically generated on saving the details.

Root Number

A 4-digit number that will be used in the firm order process to construct the risk number. On first saving a new quote, ibs will provide an opportunity to assign a Root Number value for the quote, which will be used to construct the UMR.

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Assured Code / (Re)Insured

Enter the Code for the Assured. To search for an Assured code, use the Search function.

The image shows a 'Assured Search' dialog box. It contains four input fields: 'Assured Code:' (a small text box), 'Name:' (a larger text box), 'Type:' (a dropdown menu), and 'Contact Name:' (a text box). At the bottom of the dialog are two buttons: 'Search' and 'Close'.

Select the required assured from the search results. Alternatively create a new Assured by pressing **New** on the search results screen.

If a Direct Client has been entered as the Client/Agent Code, then the Assured Code function will be unavailable and the (Re)Insured will be populated with the Direct Client name.

Class of Business

Select a Class of Business from the list. The list contains all Classes of Business for the current Department.

Re:

A brief note describing the purpose of the quote. Useful to distinguish one quote from another in a list of quotes.

Account Executive / Account Handler

Select an Account Executive from the list. This represents the party responsible for managing the quote.

Producer / Broker

Select a Producer / Broker from the list. This represents the party responsible for placing the business.

Premium

If known/relevant, enter the currency and premium amount. This value can be automatically populated from the underlying Details / Sums Insured information, if present.

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**Status**

Select a Status from the list.

Sub Division

If configured for the current department, select a Sub Division from the list.

Stats Code

Enter a suitable value to support statistical reporting.

Details

Enter a description and/or narrative for the quote.

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1.2. Insurers

To add open market insurers, press **Add** within the Open Market area.

Quotes

File View Diary Documents E-Mail Copy Quote Help Favourites Exit

Details Insurers FCA Prev Status & date

Open Market

Code	Name	Written	To Stand	Signed Line	Bureau
------	------	---------	----------	-------------	--------

< >

Add Edit Delete Move Up Move Down Export

Covers

Cover	Name	COB	Percentage
-------	------	-----	------------

Add Edit Delete Move Up Move Down Export

Line slip

Declaration from a line slip? ☐ Master Line slip number:

Update Create/Amend Doc. Extract Sums Insured Firm Order Close

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Enter the Code for the Underwriter.

The 'Underwriters' form contains the following fields and controls:

- Underwriter Code:** A text input field followed by a dropdown arrow icon.
- Written Line:** A text input field.
- Line to Stand:** A checkbox.
- Signed Line:** A text input field.
- Reference:** A wide text input field.
- Brokerage:** A text input field.
- Commission:** A text input field.
- Buttons:** 'Update', 'Placing Market', and 'Close' are located at the bottom of the form.

To search for an Underwriter code, use the Search function.

The 'Underwriter Search' form contains the following fields and controls:

- Underwriter Code:** A text input field.
- Name:** A text input field.
- Type:** A dropdown menu.
- Contact Name:** A text input field.
- Buttons:** 'Search' and 'Close' are located at the bottom of the form.

Select the required underwriter from the search results.

Written Line

Enter a percentage (**Line to Stand** box ticked or left blank as appropriate).

Reference

Enter the underwriter's reference.

Brokerage

Enter the total brokerage from the underwriter as a percentage.

Commission

Enter the commission being passed to the client/agent from the underwriter as a percentage.

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If the selected Underwriter Code is configured as a Placing Intermediary, then the Placing Market function will be enabled to record details of the underlying insurer(s) in the Placing Intermediary Market screen.

The screenshot shows a software window titled "Placing Intermediary Market". It contains a "File" menu bar. Below it, there are input fields for "Intermediary:" (containing "TARAG") and "Order to Place:" (containing "10"). A section labeled "Insurers" contains a table with the following headers: "Code", "Name", "Written", "Line To Stand", and "Signed Line". The table body is currently empty. Below the table are five buttons: "Add", "Edit", "Delete", "Move Up", and "Move Down". At the bottom of the window, there is a "Bureau Totals" section with columns for "Lloyd's", "ILU", "LIRMA", and "Companies". Under each column are two input fields, one for "Written:" and one for "Signed Lines:". At the very bottom are "Update" and "Close" buttons.

To add an underlying insurer, press **Add**. This function uses the same screens as previously described. Use **Edit** and **Delete** to alter the selected underlying insurers. Use **Move Up** and **Move Down** to alter the position of the selected insurer in the list.

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To add a Cover (binding authority), press **Add** within the Covers area.

The screenshot shows the 'Quotes' window with a menu bar (File, View, Diary, Documents, E-Mail, Copy Quote, Help, Favourites, Exit) and a toolbar with icons for search, calendar, grid, Word, Outlook, folders, and a phone. Below the toolbar are tabs for 'Details', 'Insurers', 'FCA', and 'Prev Status & date'. The 'Open Market' section contains a table with columns: Code, Name, Written, To Stand, Signed Line, and Bureau. Below this table are buttons: Add, Edit, Delete, Move Up, Move Down, and an 'Export' button with an Excel icon. The 'Covers' section contains a table with columns: Cover, Name, COB, and Percentage. Below this table are buttons: Add (highlighted with a red box), Edit, Delete, Move Up, Move Down, and an 'Export' button with an Excel icon. The 'Line slip' section has a checkbox for 'Declaration from a line slip?' and a dropdown for 'Master Line slip number:'. At the bottom are buttons: Update, Create/Amend Doc., Extract, Sums Insured, Firm Order, and Close.

Select a Cover Code from the list. By default, only current Covers will be listed. Press **Show All Items** to include all Covers.

The 'Covers' dialog box contains the following fields and buttons:

- Cover Code: [Dropdown menu] [Show All Items button]
- Name: [Text input field]
- Class of Business: [Dropdown menu]
- Percentage: [Text input field]
- [Update button] [Close button]

Select a **Class of Business** from the list and enter a **Percentage**.

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To attach to a Lineslip, tick **Declaration from a line slip** and then select a **Master Line slip number** from the list within the Line slip area.

Quotes

File View Diary Documents E-Mail Copy Quote Help Favourites Exit

Details Insurers FCA Prev Status & date

Open Market

Code	Name	Written	To Stand	Signed Line	Bureau
------	------	---------	----------	-------------	--------

< >

Add Edit Delete Move Up Move Down Export

Covers

Cover	Name	COB	Percentage
-------	------	-----	------------

Add Edit Delete Move Up Move Down Export

Line slip

Declaration from a line slip? ☐ Master Line slip number:

Update Create/Amend Doc. Extract Sums Insured Firm Order Close

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1.3. FCA

To update the FCA details, select the FCA tab.

Quotes

File View Diary Documents E-Mail Copy Quote Help Favourites Exit

Details Insurers **FCA** Prev Status & date

FCA Category: Non-Regulated

FCA Client Classification:

Source of Business:

Long/Short Tail:

FCA Client Classification Description:

Information

Update Create/Amend Doc. Extract Sums Insured Firm Order Close

FCA Category

Select either 'Regulated' or 'Not-Regulated' from the list.

FCA Client Classification

Select a value from the list. Guidance for the selected FCA Category value will be displayed in the FCA Client Classification Description box.

Long/Short Tail

Select a value from the list.

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Source of Business

If 'Regulated' is selected in the FCA Category list, select a value from the list.

Information

Enter any other details for the quote in text form.

1.4. Generate Policy Number

On first saving a new quote, the Generate Policy Number screen is displayed to allow a Root Number to be assigned to the quote. The Root Number will be used to create the firm order risk and is used in the construction of the UMR.

Generate Policy Number

Quote Number: 01370

Department: C - Commercial

Year of Account: 2025

Root Number:

Class of Business: CPROP - Commercial Property

Master Lineslip Policy: ☐

OK Cancel

Press **OK** to assign a Root Number and save the quote or **Cancel** to save the quote.

1.5. Sums Insured / Details

Press **Sums Insured** on the quote screen (*alternatively select the **Schedule** option on the File menu*) to display a more detailed screen that allows entry of further quote information. The behaviour of several of the tabs within the Sums Insured / Details screen is based on the configuration of the main Class of Business on the quote.

The following tabs are present for all Class of Business configurations:

- Assured Details
- Taxes
- Brokerage
- Subjectivities

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The following tabs are displayed subject to the Class of Business configuration. Each configuration offers data entry and functionality specifically suited to the type of placement. See Appendix 1 for example screen images:

- Schedule tab
 - Commercial Combined
 - Household
 - Property
- Interest tab
 - Jeweller's Block
 - Treaty Proportional
 - Reinsurance
 - Excess of Loss
- Binding Authority tab
 - Binding Authority
- Conditions tab
 - Binding Authority
 - Commercial Combined
 - Marine
 - Marine Hull
 - Household
 - Professional Indemnity
 - Excess of Loss
- Aircraft tab
 - Aviation
- Vessels tab
 - Marine
 - Marine Hull
- Adjustments tab
 - Marine
 - Marine Hull
- Limits and Premiums tab
 - Reinsurance
 - Excess of Loss
- Professional Indemnity tab
 - Professional Indemnity
- Limits tab
 - Professional Indemnity
- Reinstatements tab
 - Excess of Loss

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1.5.1. Assured Details

Inception Date / Time and Expiry Date / Time

Enter inception and expiry details.

Period

Narrative will automatically update to reflect the Inception/Expiry dates but can be manually updated.

(Re)Insured

Will contain the value from the Quote Details screen.

Risk Address

Will contain the current address for the selected (Re)Insured from the Account Code screen. For certain types of business, additional addresses/locations may be captured by pressing **Add Address**.

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The (Re)Insured address is treated as the first address/location. Press **Add** to clear the screen and enter a new address. Press **Close** to close the screen.

Original Assured

Where relevant, enter the name of the Original Assured.

Postal Address

Enter a postal address, typically where it differs from the Risk Address.

Business Description

Enter a description of the (Re)Insured's business.

Proposal Date

If a proposal form is applicable, select the date.

New/Renewal

Select a value from the list.

Reason for NTU / Reason

If the Quote Status is set to 'Not Taken Up', then a Reason for NTU may be selected from the list and/or additional text can be entered in the Reason field.

Estimated Brokerage

Enter an estimated brokerage amount (and currency) for information purposes.

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1.5.2. Taxes

Details for quotation 01374

Assured Details Vessels Adjustments Conditions Taxes Brokerage Subjectivities

Taxes:

Net To Client:

Update Close

Select up to 3 taxes from the list. The default percentage associated with each selected tax will populate in the percentage field but can be manually updated. To remove a selected tax, remove the corresponding percentage and then tab out of the percentage box.

1.5.3. Brokerage

Details for quotation 01374

Assured Details Vessels Adjustments Conditions Taxes Brokerage Subjectivities

Total Brokerage (%): Market Subscription Brokerage: ☐

Agent Commission (%):

Third Parties (%):

Retained Brokerage (%):

Admin Fee:

Policy Fee:

Charitable Donation:

Net To Client:

Placing Fee:

Legal Protection: Amount

LP Brokerage Amount:

Update Close

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**Total Brokerage**

Enter the total brokerage provided by underwriters.

Agent Commission

Enter the commission being passed to the client/agent.

Third Parties

Select up to 5 third parties and enter their corresponding commission percentages.

Retained Brokerage (read only)

A calculation of the Total Brokerage less Agent Commission and Third Party commissions.

Admin Fee/Policy Fee/Charitable Donation/Placing Fee

Enter amounts as necessary. Note that these Fees can be renamed and configured to debit/credit specific accounts.

1.5.4. Subjectivities

Details for quotation 01374

Assured Details | Vessels | Adjustments | Conditions | Taxes | Brokerage | **Subjectivities**

Description	Days	Expected	Completed	Notes
-------------	------	----------	-----------	-------

Subjectivities

▼

Add Edit Delete Move Up Move Down

Update Export Close

Subjectivities can be selected from the list (if any are pre-configured within Administration) or added manually. On both cases the following information is required.

Description

Enter a description of the subjectivity.

Days

Enter the number of days to completion.

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**Expected**

Enter an expected completion date.

Completed

Enter the completion date.

Notes

Enter additional explanatory notes.

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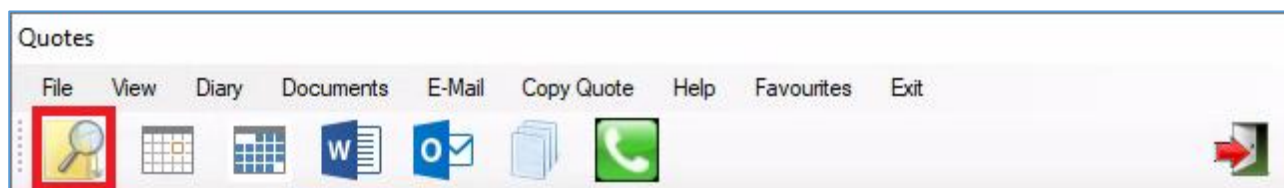
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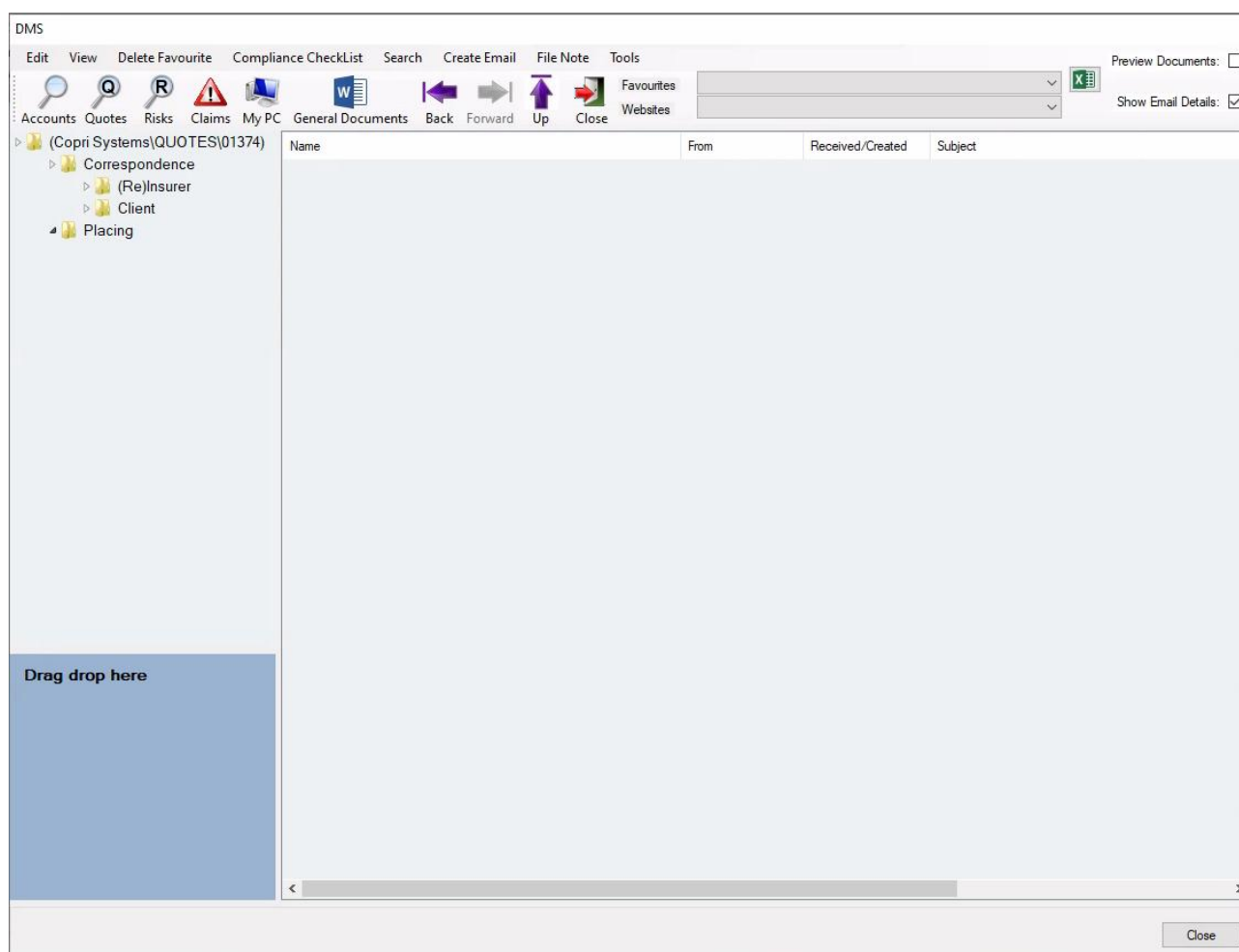
1.6. Document Management System (DMS)

On creation of a new quote, ibs automatically creates new folders within the ibs network folders to record files and emails associated with the quote.

The folders can be accessed by pressing **Document Viewer** icon on the quote toolbar (*alternatively select the **Documents** option on the View menu*).



Documents generated by ibs will be stored in the relevant folders and users may drag/drop emails and files into the folders by selecting the folder and then dragging the file/email into the '**Drag drop here**' pane.

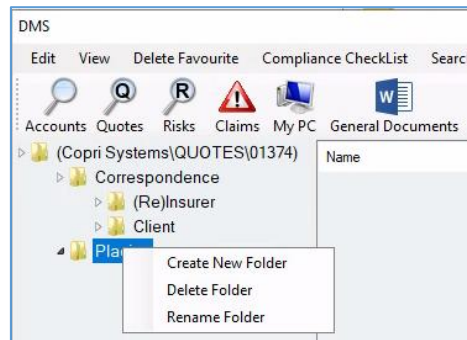


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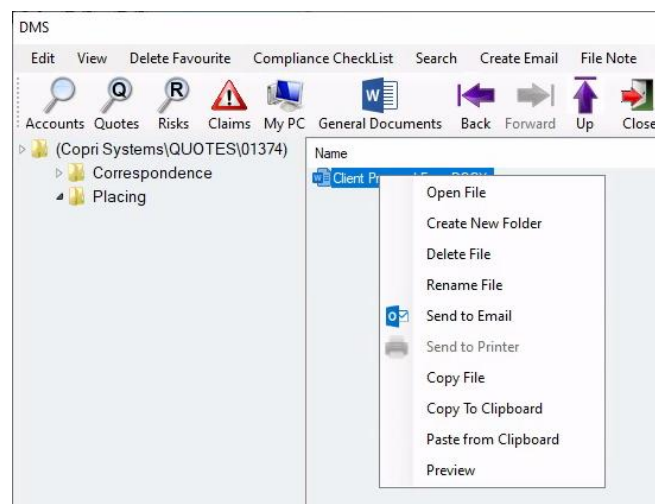
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Default folders for new quotes can be configured, folders may be created, renamed and deleted by right-clicking on the relevant folder and selecting an option from the floating menu.



Files and emails that are stored can be accessed by right-clicking on the file and selecting an option from the floating menu.



Back/Forward/Up buttons allow navigation across the folder structure i.e. to interrogate folders and contents for other quotes and risks.

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1.7. Documents

1.7.1. Per Class of Business

Each Class of Business can be configured with document templates for the following types of output:

- Rating Sheet
- Slip
- Quotation
- Confirmation

Pressing **Create/Amend Doc** on the quote screen (alternatively select the **Create Document** option on the *File menu*) will display the document menu screen. If only one document template is configured, then the document menu screen is bypassed.

The screenshot shows the 'Quotes' application window. The 'Details' tab is active, displaying various fields for a quote. A modal dialog box titled 'Select Document Type' is overlaid on the main window. This dialog has four radio button options: 'Rating Sheet' (which is selected), 'Slip', 'Quotation', and 'Confirmation'. At the bottom of the dialog are 'OK' and 'Cancel' buttons. In the background, the 'Create/Amend Doc.' button at the bottom of the main window is highlighted with a red rectangle. The main window also shows fields for Quote Number (01374), Client/Agent Code (0456), Date (06 Jun 2025), Time (13:37), Name (Copri System), Address (Broughton Down Farmhouse, Nether Wallop, Stockbridge), Root Number, Policy Wording, Assured Code, (Re)Insured (Copri System), Class of Business (CAV - Commercial Aviation), Account Executive (GPMGB - Geoff Barden), CCY & Premium (0.00), Sub Division (Direct), Sum Insured, Re, Producer, Status (Prospect), and Stats Code.

Documents will be saved within the 'Placing' folder in the DMS. Repeated generation of the same document type will refresh the existing document, thereby retaining any manual updates made to the document.

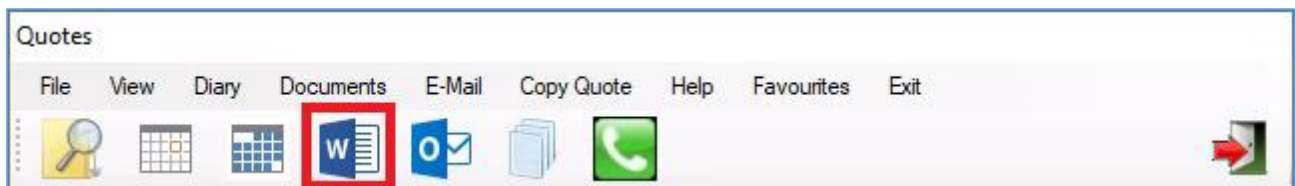
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1.7.2. General Documents

In addition to document templates per Class of Business, more general document templates can be configured using the General Letter Templates function in Administration.

A General Letter template can be used by pressing the **Create a General Word Document** icon on the quote toolbar.



This will display the template selection screen, requiring selection of Level 1 and Level 2 categories together with optional entry of Save Path and File Name values.

A screenshot of the 'Print General Documents' dialog box. It contains four input fields: 'Level 1:' with a dropdown arrow, 'Level 2:' with a dropdown arrow, 'Save Path:' with a text box and a browse button (...), and 'File Name:' with a text box. At the bottom are two buttons: 'Create' and 'Close'.

Press **Create** to generate the document. If a Save Path is not specified, then the document will be saved in a General Correspondence folder and can be accessed within the DMS.



1.8. Firm Order

A Firm Order risk can be created from a quote by pressing **Firm Order** on the main quote screen.

The screenshot shows the 'Quotes' application window. The menu bar includes File, View, Diary, Documents, E-Mail, Copy Quote, Help, Favourites, and Exit. The toolbar contains icons for search, calendar, grid, Word, Outlook, folder, and phone. The 'Details' tab is active, showing fields for Quote Number (01374), UMR, Date (06 Jun 2025), Time (13:37), Client/Agent Code (A1CL2), Name (A1 Client Account 2), Address (London), E-Mail, Contact Name, Telephone No, and Fax No. Other fields include Root Number, Policy Wording, Assured Code (S0061), (Re)Insured (Windows Eleven Inc), Class of Business (CAV - Commercial Aviation), Account Executive (GPMGB - Geoff Barden), Re, CCY & Premium (0.00), Producer, Sub Division (Direct), Status (Prospect), Sum Insured, and Stats Code. A 'Details' text area is at the bottom. The 'Firm Order' button is highlighted with a red rectangle.

This will result in the creation of a new risk containing all details from the quote. The quote Status is automatically set to 'Firm Order' and all quote details become read-only.

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1.9. Tracker Log

Selected activities within the quote are automatically recorded to evidence key milestones including Created Date, Last Updated Date and Slip Created Date.

Select the **Quote Tracking** option on the View menu to open the Tracker Log.

The screenshot shows a 'Tracker Log' window with a tabbed interface. The 'Quote' tab is selected, and the 'FCA' sub-tab is active. The window contains a form with the following fields:

Quote Number:	01374	Quote Slip Created Date:	06 Jun 2025
Quote Created Date:	06 Jun 2025	Quote Slip Created By:	same
Quote Created By:	same	NTU Date:	06 Jun 2025
Quote Last	09 Jun 2025	NTU By:	same
Quote Updated By:	same	Date Sent to Client:	☐
		Send By:	

At the bottom of the window, there are two buttons: 'Update' and 'Close'.

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The FCA tab contains additional date values, all of which may be manually updated.

Tracker Log

Quote FCA

ToB Sent to Client:	09 Jun 2025	
IDD Sent to Client:	09 Jun 2025	
SoDaN Sent to Client:	09 Jun 2025	
Policy Summary Sent to Client:	09 Jun 2025	
Policy Wording Agreed with Insurer and Client:	09 Jun 2025	
Policy Documentation Received from Insurer:	09 Jun 2025	
Policy Documentation Sent to Client:	09 Jun 2025	

Update Close

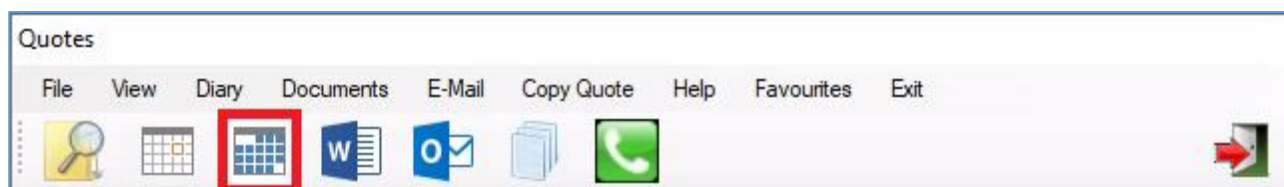
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1.10. Diary

To open the Diary, press the View Diary icon on the quote toolbar (*alternatively select the **View Diary** option on the Diary menu*).



Diary for quote 01374

File Help

Diary Details From: Tue 03 Jun 2025 up to: Sat 05 Jul 2025 Refresh

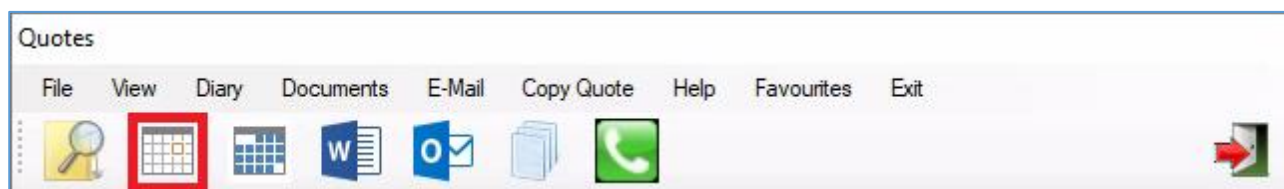
User Name: [ALL] ☐ Include Completed ☐ Include Deleted

Date	Name	Client	Description	Policy No	Claim No	Quote No	User Name	Status	Date Deleted	Deleted by	Date Completed	Completed by
------	------	--------	-------------	-----------	----------	----------	-----------	--------	--------------	------------	----------------	--------------

Add Edit Delete Complete Export Close

The Diary screen will show all diary items for the quote using a default diary date range. Tick/untick the 'Include Completed' and 'Include Deleted' tick-boxes to display completed and deleted diary items.

To create a new diary entry, press the Create Diary Item icon on the quote toolbar (*alternatively select the **Create Diary Item** option on the Diary menu*).



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A screenshot of a web-based 'Diary' form. The form is titled 'Diary' in the top left corner. It contains several input fields: 'Date: Tuesday' with a calendar icon and 'Tue 10 Jun 2025' selected; 'User Name:' with a dropdown menu showing 'same'; 'Client Code:' with 'A1CL2'; 'Name:' with 'Windows Eleven Inc'; 'Policy Number:' (empty); 'Claim No.:' (empty); 'Quote Number:' with '01374'; and 'Comments:' with a large text area. At the bottom are three buttons: 'Update' (highlighted with a blue border), 'Add', and 'Close'.**Diary Date**

Enter a date for the diary item i.e. a date by which the associated activity should be complete.

User

Defaults to the current user. Select a different user from the list where necessary.

Client Code

Defaults to the client account code from the quote.

Name

Defaults to the Assured Name from the quote.

Policy Number

Defaults to blank (from a quote).

Quote Number

Defaults to the quote number from the quote.

Comments

Enter free text narrative or description of the diary item.

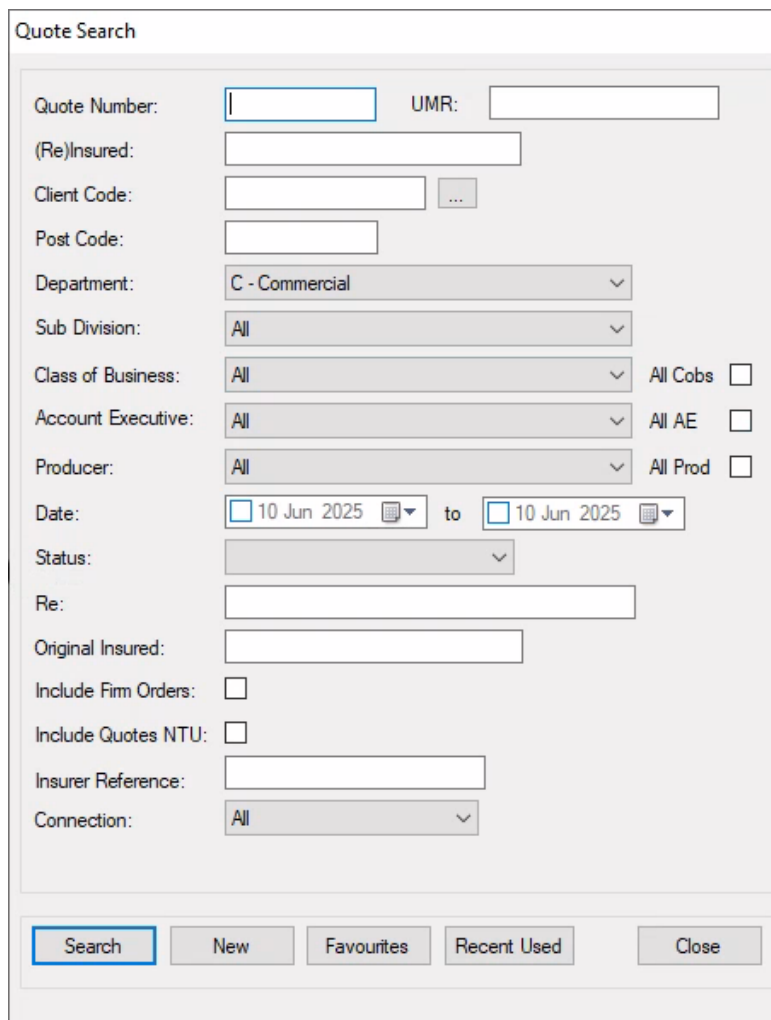
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2. Amend a Quote

To open an existing quote, press the Quote icon on the desktop to display the Quote Search screen (alternatively select the **Amend a Quote** option on the Quotes menu).



The 'Quote Search' dialog box contains the following fields and controls:

- Quote Number:
- UMR:
- (Re)Insured:
- Client Code: ...
- Post Code:
- Department:
- Sub Division:
- Class of Business: All Cobs ☐
- Account Executive: All AE ☐
- Producer: All Prod ☐
- Date: to
- Status:
- Re:
- Original Insured:
- Include Firm Orders: ☐
- Include Quotes NTU: ☐
- Insurer Reference:
- Connection:

Buttons at the bottom: Search, New, Favourites, Recent Used, Close.

Enter the quote number, if known, otherwise to search for a quote, enter any combination of relevant criteria and press **Search**. All quotes matching the criteria will be presented in the Search Results screen.

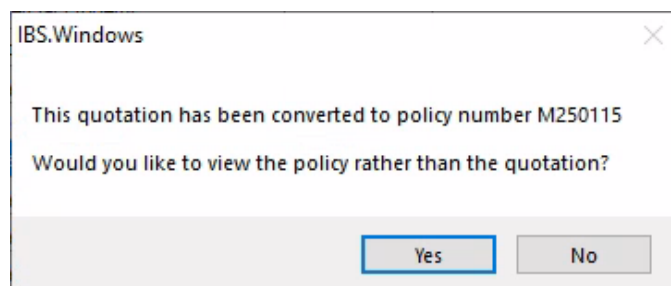
Alternatively press **Favourites** to display the current user's list of favourite quotes. Or press **Recent Used** to display the last 20 most recently opened quotes (for the current user), with the most recent being at the top of the Search Results screen.

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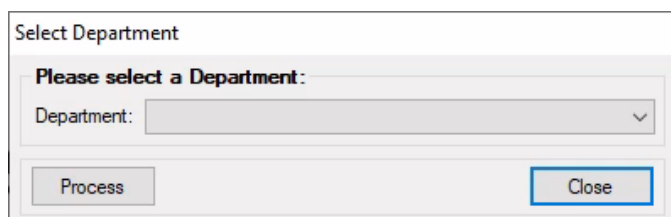
If a quote has been firmed up, an attempt to open it will display the following screen prompt, offering the option to open the quote or the firm order risk.



A quote that has been firmed up will be displayed in read-only mode i.e. none of the details will be modifiable.

3. Change Department

To change the currently selected Department, select the **Amend a Quote** option on the Quotes menu.

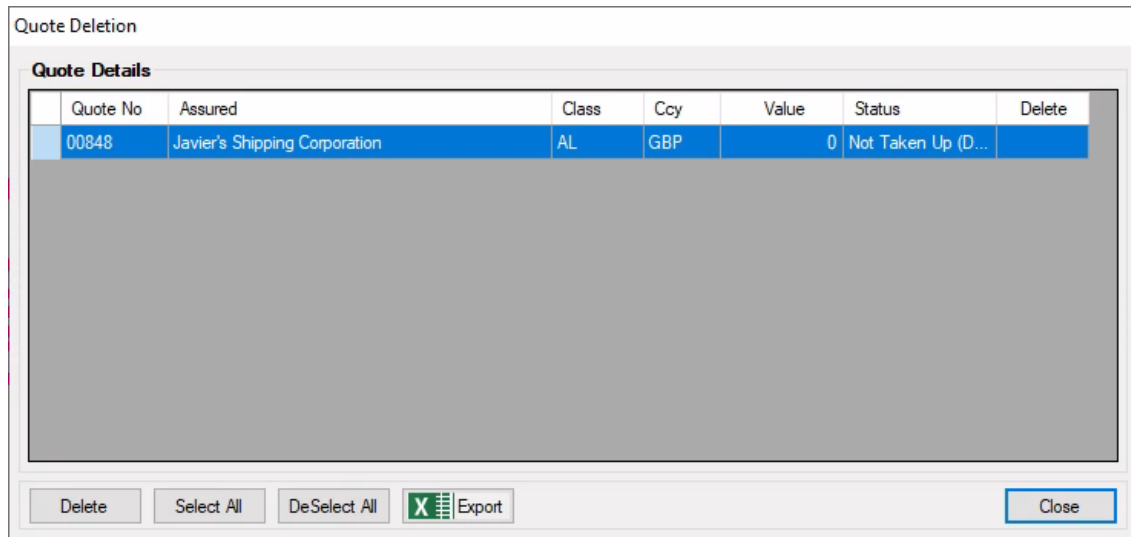


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4. Quote Deletion

To delete a quote, select the **Quote Deletion** option on the Quotes menu. The Quote Deletion screen contains a list of all quotes that have the Status set to 'Not Taken Up (Delete)'.



The 'Quote Deletion' window displays a table of quotes with the following columns: Quote No, Assured, Class, Ccy, Value, Status, and Delete. The first row is highlighted in blue.

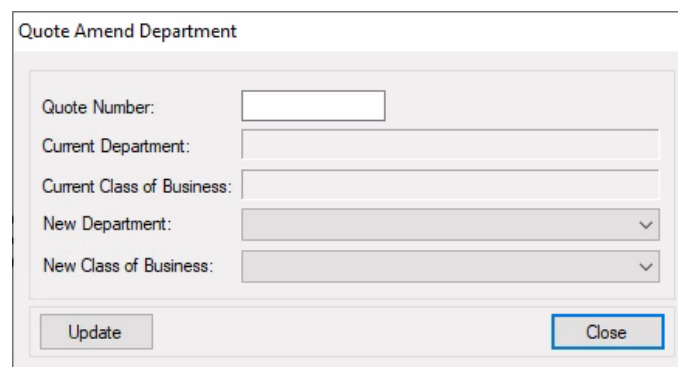
Quote No	Assured	Class	Ccy	Value	Status	Delete
00848	Javier's Shipping Corporation	AL	GBP	0	Not Taken Up (D...	

At the bottom of the window, there are buttons for 'Delete', 'Select All', 'DeSelect All', 'Export' (with an Excel icon), and 'Close'.

Select one or more quotes in the list by double-clicking the row(s) or press **Select All** to select all quotes. Then press **Delete** to permanently delete the selected quotes.

5. Quote Amend Department

To change the Department for an existing quote, select the **Quote Amend Department** option on the Quotes menu.



The 'Quote Amend Department' window contains the following fields and buttons:

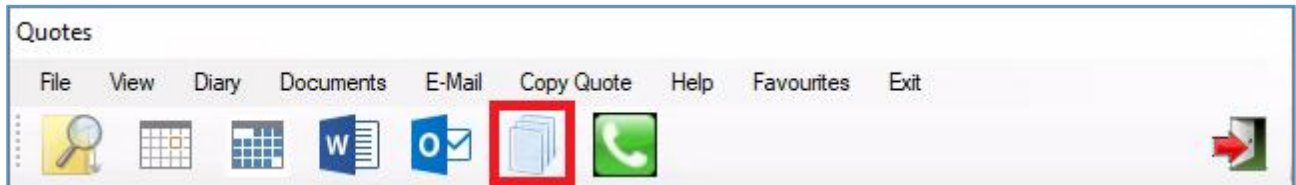
- Quote Number:
- Current Department:
- Current Class of Business:
- New Department:
- New Class of Business:
- Update button
- Close button

Enter a valid quote number then select the new Department and Class of Business values.



6. Copy Quote

To create a new quote as a duplicate of the current quote, press the **Copy Quote** button within the current quote.



Copy Quote Number 01374

How many Quotes would you like to create?

Type

New Quote: ☒

Endorsement: ☐

Layer: ☐

Linked: ☐

Items to Copy

Copy existing Quotation document: ☐

Assured: ☒

Market: ☐

UMR and Root Number: ☐

Enter the number of quotes to be created.

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7. Appendix 1

Jeweller's Block

Details for Quotation - 01371

Assured Details Interest Taxes Brokerage Subjectivities

Interest: Jeweller's Block

Limits:

Territorial Limits:

Information:

Treaty

Treaty Numbers:

Lloyd's: Serial Number: Premium Reserve: %

LIRMA: ID of Treaty: Interest: %

ILU:

Update Close

Binding Authority

Details for quotation 01371

Assured Details Binding Authority Conditions Taxes Brokerage Subjectivities

Interest: Binding Authority

Gross Premium Income Limit: %

Warning Limit (%):

Bordereau Frequency:

Next Bordereau Date: 6 June 2025

Person(s) Overall Responsible:

Authorised Binders:

Claim Authorisers:

Territorial Limits:

Information:

Update Close

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Aviation

Details for quotation 01372

Assured Details Aircraft Taxes Brokerage Subjectivities

Aircraft Reg. No. Val.

Aviation Sections

Aircraft Make Type:

Reg No:

Value: CCY: Amount:

Weight: kg

Deductibles: CCY: Amount: Percent:

Limit of Liability: CCY: Amount:

Max Passengers:

Purpose of use:

Pilots:

Geographical Limits:

Date Added:

Date Deleted:

Produce Certificate: ☐

Add Copy << < 1 of 1 > >> Close

Amend Select All De-Select All

Update Export Close

Marine

Details for quotation 01373

Assured Details Vessels Adjustments Conditions Taxes Brokerage Subjectivities

CCY Sum Insured Interest Vessel

Marine Sections

Sum Insured:

Interest:

Vessel:

From:

To:

Via:

IMO Number:

Vessel Type:

Navigation Area:

Gross Tonnage:

Rate:

Minimum:

Qualifier:

Premium:

Total Premium:

Amend Delete Delete Unused

Update Export

Insert Delete << < 1 of 1 > >> Close

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Marine Hull

Details for quotation 01373

Assured Details

Vessels

Adjustments

Conditions

Taxes

Brokerage

Subjectivities

Vessel	Owner	CCY	Sum Insured	Built	Flag
--------	-------	-----	-------------	-------	------

Amend

Delete

Update

Export

Marine Sections

Vessel:

Owner:

Sum Insured:

Built:

Flag:

DWT:

Class:

IMO Number:

Vessel Type:

Navigation Area:

Gross Tonnage:

Deductible:

Rate:

Minimum:

Qualifier:

Premium:

Total Premium:

Insert

Delete

<<

<

1 of 1

>

>>

Close

Household/Property

Details for Quotation - 01374

Assured Details

Schedule

Conditions

Taxes

Brokerage

Subjectivities

Sect.	Sub Sect.	Description	Text	Sum Insured	Rate	Minimum
-------	-----------	-------------	------	-------------	------	---------

Amend

Delete

Calculated Premium: 0.00

Override

Override Premium: 0.00

Update

Export

Close

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Treaty

Details for Quotation - 01374

Assured Details Interest Taxes Brokerage Subjectivities

Interest:

Limits:

Territorial Limits:

Information:

Treaty

Treaty Numbers:

Lloyd's: Serial Number: Premium Reserve: %

LIRMA: ID of Treaty: Interest: %

ILU:

Update Close

Reinsurance

Details for Quotation - 01374

Assured Details Limits & Premiums Interest Taxes Brokerage Subjectivities

Sect	Sub	Cob	Ccy	Limit	Limit Basis	Excess	Excess Basis	Premium

Sect: Sub-Sect: COB: Limit:

Sub-Sect Text: Excess:

Add Edit Delete Add Section Move Up Move Down Premium: ROE: Aggregate:

Details

Aggregate: Aggregate Currency: War Included: ☐ LOC/OCA: ☐

Total Premium

Premium Type: Principal Currency: Premium: Adjustable: ☐

Update Export Close

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Professional Indemnity

Details for quotation 01374

Assured Details Professional Indemnity Limits Conditions Taxes Brokerage Subjectivities

Retroactive Date: June 2025

Profession:

Legal Jurisdiction:

Specific Exclusions:

Information:

Territorial Limits:

Subjectivities:

Update Close

Details for quotation 01374

Assured Details Professional Indemnity Limits Conditions Taxes Brokerage Subjectivities

Limits

Limit	Limit Basis	Premium	Firm Order

Limit:

Premium: Firm Order: ☐

Add Edit Delete Move Up Move Down

Excess:

Firm Order: ☐

Alternative Excesses

Excess	Excess Basis	(Discount)/Loading	Firm Order

Excess:

Discount/Loading: % Firm Order: ☐

Add Edit Delete Move Up Move Down

Total Premium:

Update Export Close

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Excess of Loss

Details for Quotation - 01374

Assured Details

Limits/Premiums

Reinstatements

Adjustments

Conditions

Taxes

Brokerage

Interest

Subjectivities

Line	Description	Details	Limit	Limit Basis
1	Layer 1			
2	Layer 2			

Minimum Premium:

Last Declared Period Premium:

Total Declared Annual Premium:

Total Client Paid:

Notes:

Orig Total Estimated Period Premium:

Orig Total Premium:

Total Estimated Period Premium:

0.00

Total Estimated

Amend

Delete

Add

Update

Export

Close

Details for Quotation - 01374

Assured Details

Limits/Premiums

Reinstatements

Adjustments

Conditions

Taxes

Brokerage

Interest

Subjectivities

Reinstatement

Reinstatements Y/N: ☐ No. of reinstatements: Loss/AP Provision: RI's in CCY of Loss: ☐

Reinstatement Details

Sect	Sub	Cob	No of RI	Reinstatement %	Reinstatement Basis	SELECT
------	-----	-----	----------	-----------------	---------------------	--------

Section: Sub-Section: COB: No.: Percentage:

Add Edit Delete Basis:

Update

Export

Close

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Details for Quotation - 01374

Assured Details Limits/Premiums Reinstatements **Adjustments** Conditions Taxes Brokerage Interest Subjectivities

Adjustments

No of Premium Adjustments: Standard Adjustment Rate: % Minimum Adjustment Rate: %

Next Adjustment Date: Provisional Adjustment Rate: % Max Adjustment Rate: %

Adjustment Settlement Date:

Adjustment Basis:

☒ Profit Commission ☒ NCB

Profit Commission Details

Profit Commission Due Date:

Profit Commission: %

Reinsurers Expenses: %

Deficit Clause:

Deficit Period:

Notes:

NCB Details

NCB Due Date:

NCB Percentage:

Notes:

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