

BROKER PLUS

Full Client Information at your fingertips

Client Summary Page. Redesigned to provide all Clients information in a concise format, displaying:

- Full Client Contact Details
- Policy Summary
- Outstanding Debts
- Outstanding Claims
- Aged Debts Summary
- Full Policy / Risk Details
- Outstanding Tasks
- Quick Search

BrokerPlus - William Carrobot

Menu Search: Client Policy No Invoice Claim Broker Rep Task

Balance \$0.00 Client

INTERESTS & RISKS

Interest and Risk	Class of Business	Period of Insurance	Insurer / Policy Number
C 256 High Street, WOOLLOONGABBA	Business	01/10/2007 - 01/10/2008	The 2nd Insurance Company / HOL-QLD000008BF
\$ My New House	Residential	20/12/2007 - 20/12/2008	The Insurance Company P/L H / 200
New Hollard Business	Business	22/01/2008 - 22/01/2009	The Insurance Company P/L H
Resi	Residential	22/01/2008 - 22/01/2009	The Insurance Company P/L H
Office Pak - 56, Logan Road	Business	12/02/2007 - 12/02/2008	The 2nd Insurance Company / 123456789COM07

OUTSTANDING DEBTS Balance: \$0.00

Date	Type	Details	Inv No	Amount
09/07/2010	New Business	Ford Falcon 133 ABC Mk III	000477	-\$1,705.00
	[Debtor] Motor Vehicle	The 2nd Insurance Company: BTH-MV0000025QLD-AU		
20/12/2007	New Business	My New House	000321	\$5,500.00
	[Debtor] Residential	The 2nd Insurance Company: 200		
20/12/2007	New Business	My New House	000320	\$5,500.00
	[Debtor] Residential	The 2nd Insurance Company: BTH-RES0000017QLD-AU		
03/09/2007	New Business	56 Logan Road, WOOLLOONGABBA, QLD 4102	000156	\$550.00
	[Debtor] Residential	The 2nd Insurance Company: Policy no. TBC		

OUTSTANDING TASKS Client Tasks Policy Tasks Claim Tasks

Date/Pty	Ref	Policy/Description/Follow up	Type/Status/Contact	Notes	Doc
19/12/2007	C:1	Ford Falcon 133 ABC Mk III	Claim: Notification	Yes	Yes
	Normal	Claim Form sent	Not started		
		Received Claim Form ?	Bill Carrobot		
22/11/2007	C:4	256 High Street, WOOLLOONGABBA	Claim: Acknowledge/Notific	No	No
	Normal	E Mail Test	In progress		
		E Mail Test	Bill Carrobot		
30/09/2007	E:1	William Carrobot	Client: Survey/review of requirements	Yes	Yes
	Normal	Welcome Pack Sent	Waiting on Client		
		Survey feedback received?	John Davies		

OUTSTANDING CLAIMS

Date	Ref	Claims Details	Policy/Contact	Status	OS Task
09/12/2007	10	Brief Desc skjddh dsvh d h sd hh hkihd h hihk...	256 High Street, WOOLLOONGABBA	Advised	No
	12345678	Situation			
01/01/0001	5	Claim Details	256 High Street, WOOLLOONGABBA	Advised	Yes

Days Outstanding Balance

< 7	\$0.00
7 - 14	\$0.00
15 - 30	\$0.00
31 - 60	\$0.00
61 - 90	\$0.00
> 90	\$0.00
Sub Total	\$0.00
Receipts	\$0.00
Balance	\$0.00

lxp-brian: brokerplus1 - brian.hamer E:113



NAQTechnology

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Users Home Page. Displayed when the user first logs in, this page can be customised per user, allowing them to view:

- Outstanding Tasks
- Outstanding Debts
- Policies due for Renewal
- Outstanding Payments to Insurers

The screenshot shows the BrokerPlus application window with the following sections:

- OUTSTANDING TASKS:** A table with columns: Due Date, Ref, Priority, Client, Policy/Description/Follow up, Type/Status/Contact, Notes, Doc, Queue. It lists tasks for William Carrobot, Paul Williams Jnr, and Brian Hamer.
- POLICIES DUE FOR RENEWAL:** A table with columns: Date, Client, Policy, Insurer/Policy No. It lists policies for Alan daview, My New Client, and New Client 1.
- OUTSTANDING DEBTS:** A table with columns: Date, Client, Type, Details, Inv No, Amount, Balance, Client Total. It lists debts for Expir Register 12-12-07, William Carrobot, and New Client 1.

Entity Details Page. Allows easy entry & update of Client Contact & Account information, including:

- Client Contact Details
- Account information
- Sales & Marketing
- Business Details for Organisations
- Administration information
- Sub Agent & Account Payee details

The screenshot shows the Entity Details form for REF: 12, William Carrobot, t/as Carrobot & Sons. The form is divided into several sections:

- Contact Details:** Name (William Carrobot), t/as (Carrobot & Sons), Address (PO Box 1245, WOOLLOONGABBA QLD 4102), Suburb, State/Postcode, Contact (Bill Carrobot), Job Title (Owner), Salutation (Bill), Business Phone (0733920300), Fax (07 3392 0311), Mobile (0434 352 273), Home Phone (07 3392 0345), Web (www.naq.com.au), Email (bill@naq.com.au).
- Organisation Details:** Nature of Business (Electricians), Industry (Services), ABN (Unknown), ACN (Unknown), Year Established (1995), Structure (Partnership), Annual Turnover (\$125,000), No. of Employees (2).
- Account Details:** Branch (Branch 3), Account Type (Cash), Sales Team (QLD 1 - Dom), Service Team (QLD - A2), Classification (VIP), Source (BrokerPlus Collector [Web]), Area (Eastern Suburbs), Usual Debtor (Brisbane Brokers).
- Individual Details:** Occupation (Self Employed), Employer (N/A), Date of Birth (16/04/1947), Spouse Name (Angela), No. of Dependents (0).
- Broker Representative Details:** Broker Reps (Brisbane Brokers).

Buttons for Roles and Permissions are visible at the top right. The form includes OK and Cancel buttons at the bottom.

Policy Header Page. Where Policy details are entered & amended. Policies can be marked as Non Renewable, Cancelled or Lapsed:

Policy Header - William Carrobot Ph: 0733920300

Business: **256 High Street, WOOLLOONGABBA**
 Insurer: The Insurance Company P/L H
 Policy Number: HOL-QLD0000008BRIS-07

Period of Insurance		Status	
From	01/10/2007	Type	Renewable
To	01/10/2008	Period	12 months
Hidden	<input type="checkbox"/>	Status	Not Current
Last workbook created by		Cancelled 01/10/2007	
07/12/2007			

OK Cancel

Last Updated On: 12/02/2008 Last Updated By: INTERNAL\brian.hamer

Transaction Details Page. Full details of the accounting transactions are displayed including payments due / made from the Client, Sub Agent & Insurer; Income details, a summary of associated documents & history of record amendments:

Transaction Details - William Carrobot Ph: 0733920300

Inv No: **000485** Business: Office Pak - 56, Logan Road
 Insurer: The 2nd Insurance Company Effective Date: 12/02/2007
 Policy Number: 123456789COM07 Cover Note No. [] Policy Dates: 12/02/2007 to 12/02/2008

Client: William Carrobot		Insurer: The 2nd Insurance Company		Net Broker Rep: Brisbane Brokers	
Base Premium	\$8,750.00	Credit Term Date	12/02/2007	Transaction Total	\$9,625.00
Terrorism Levy	\$0.00	Gross Premium	\$9,625.00	Premium Comm	\$87.50
Withholding Tax	\$0.00	Commission	\$875.00	Premium Comm GST	\$8.75
Override Levy	\$0.00	Commission GST	\$87.50	Fee Comm	\$0.00
Underwriter Fee	\$0.00	Net due to Insurer	\$8,662.50	Fee Comm GST	\$0.00
Underwriter Fee GST	\$0.00	Amount Paid	\$8,662.50	Total (ex GST)	\$87.50
Total Base Premium	\$8,750.00	Date Paid	n/a	Total GST	\$8.75
Fire Service Levy	\$0.00	Comm Due	\$0.00	Total (inc GST)	\$96.25
GST on Premium	\$875.00	History		Transaction Summary	
Stamp Duty	\$0.00	Workbook Created by	brian.hamer	Transaction Total	\$9,625.00
Gross Insurer Premium	\$9,625.00	Policy Created	12/02/2008	Broker Rep Comm/Fee	\$96.25
Broker Fee	\$0.00	Transaction Posted by	brian.hamer	Total due from B/Rep	\$9,528.75
Broker Fee GST	\$0.00	Trans Posted	12/02/2008	Paid by Broker Rep	\$9,528.75
Transaction Total	\$9,625.00	Received by	brian.hamer	Outstanding from B/Rep	\$0.00
This transaction is paid by Brisbane Brokers		Documents		Income	
		Billing Document	n/a	Total Comm/Fee	\$962.50
		Closing Document	n/a	B/R Comm/Fee	\$96.25
				Net Comm/Fee	\$866.25

Last Updated on: 12/02/2008 Last Updated by: INTERNAL\brian.hamer Reversed by: 000486 OK Cancel

BROKER PLUS

Products in the BrokerPlus suite:

BrokerPlus	Complete Broker Office Administration System
BrokerPlus Express	Hosted version of BrokerPlus
BrokerPlus Go!	Access key BrokerPlus data on your mobile device
BrokerPlus Collector	Collect BrokerPlus data on your website & save directly into BrokerPlus
BrokerPlus ReportMaster	Produce extensive custom reports using the BrokerPlus database
BrokerPlus eB+	Access to your BrokerPlus data via the web without need for Remote software



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