

BROKER PLUS Collector

Load Website Forms Data directly into BrokerPlus

- Collect Quote information from Prospects or Sub Agents directly from your website
- Pages may be customised to reflect your own Corporate image & colours
- Data content is validated against business rules you provide, ensuring only accurate data is received
- Fields can be marked as Mandatory which will ensure these questions are answered before the quote can be transmitted
- File is forwarded to you immediately for processing
- Data is uploaded into BrokerPlus at a press of a button
- Produce Quotation Slips, Proposal Forms, Certificates, Closings, Receipts all without rekeying data

Client & Sub Agent data is captured using easy to use web forms

Business Insurance Quotation Request - Client Details - Windows Internet Explorer

www.brokerplus_collector.com.au

Business Insurance Quotation Request - Client Details

Menu

- Broker Details
- Client Details**
- Insurance / Claim History
- Policy Detail
- Construction / Protection
- Endorsements/Notes

Sections

- Building / Contents
- Business Interruption
- Business Liability
- Theft
- Money
- Glass
- Portable Items
- Machinery Breakdown
- Electronic Equipment
- Goods in Transit

Client Details

Client name	Peter Williams-Davies
Trading as	WD Design
ABN	12345678901
Contact	Peter Williams-Davies
Job title	Owner
Address	PO Box 8018
Suburb/State/P'code	WOOLLOONGABBA QLD 4102
Business phone	07 3392 0300
Home phone	07 3265 1125
Mobile phone	0434 852 456
Facsimile	07 3392 0311
Email	pwd@wddesign.com.au
Website	www.wddesign.com.au

Submit Clear Close

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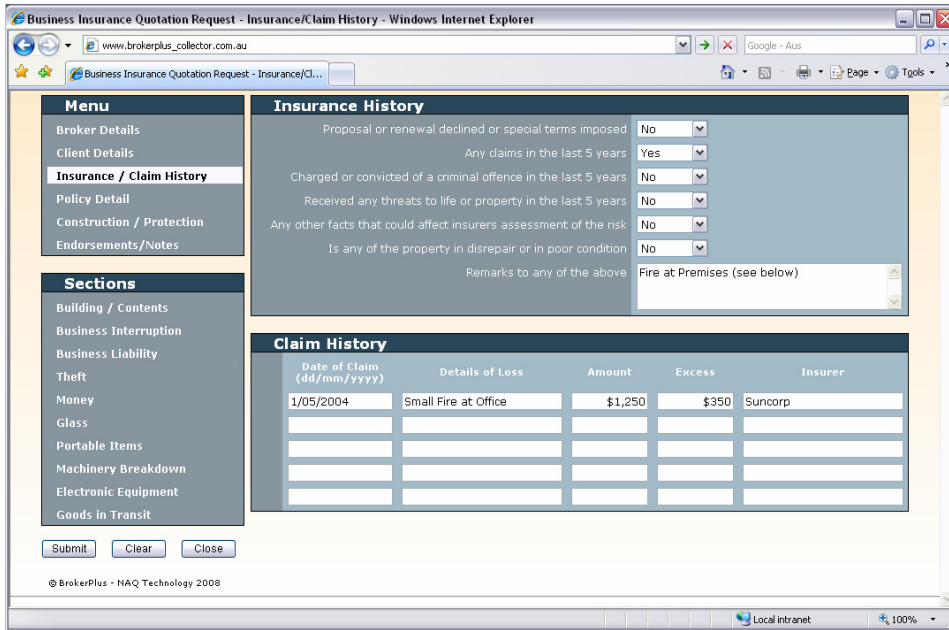


NAQTechnology

Phone: 07 3896 2900

Email: sales@naqtechnology.com.au

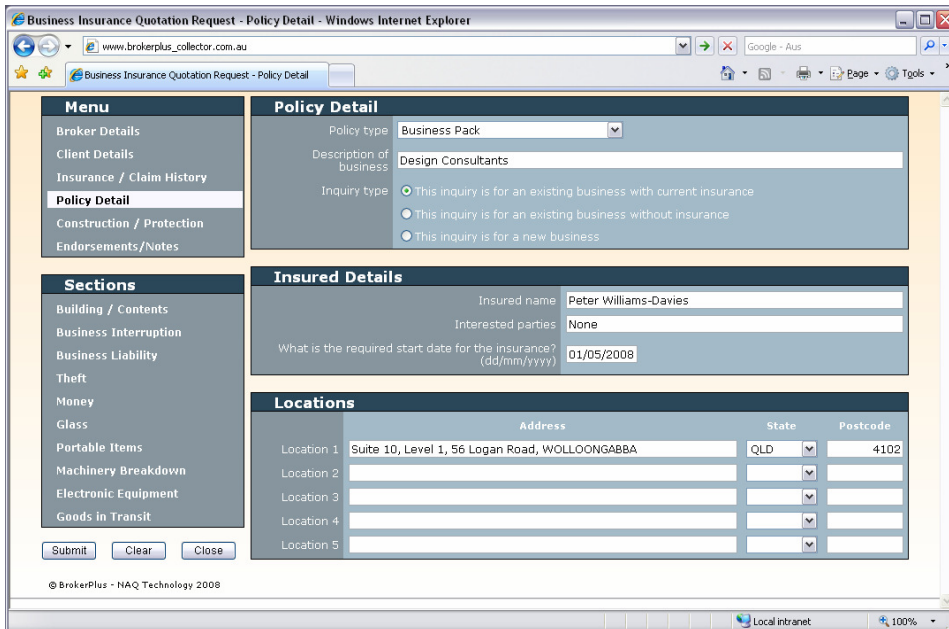
Insurance Website: www.naqinsurance.com.au



Insurance & Claims History

Utilising the standard BrokerPlus workbook formats, generic information like Insurance & Claims history can be captured & populated into the appropriate areas of the workbook

This information is common to all Class of Business & forms part of the standard BrokerPlus Collector program

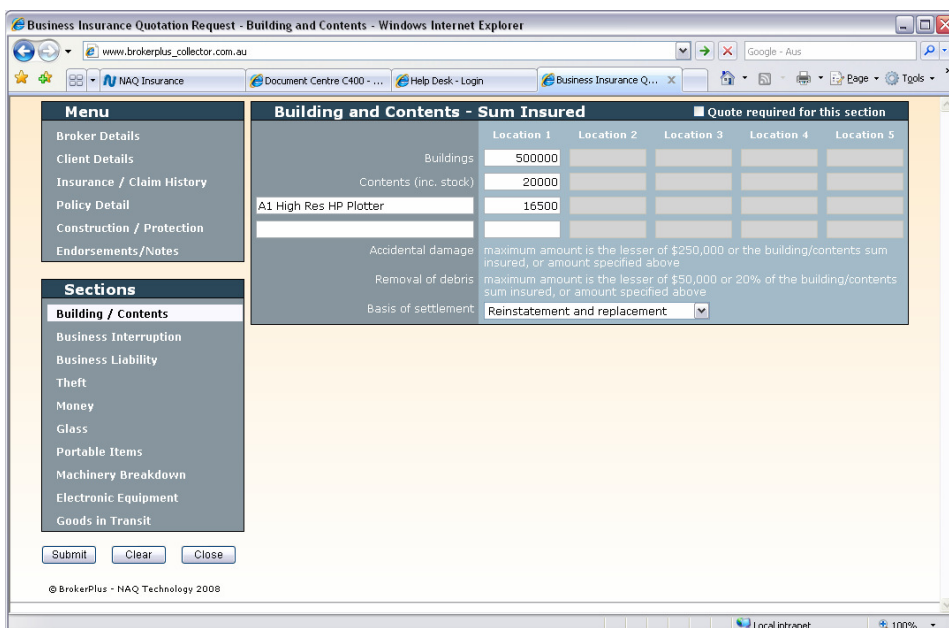


Policy & Insured Details

Information pertaining to individual Classes of Business can be added to the core BrokerPlus Collector web forms

This is an example of a Business Policy which not only allows the collection of Risk Locations, but also details regarding the Business itself

This page can be customised to include specific fields per Class of Business

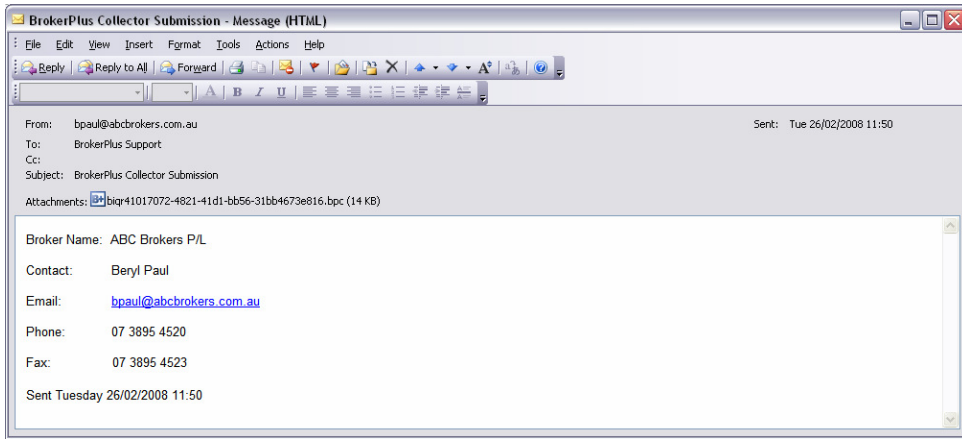


Risk Sections

The second menu relates to each section available within the specific Class of Business

BrokerPlus Collector can be tailored to display any number of sections for each Class of Business

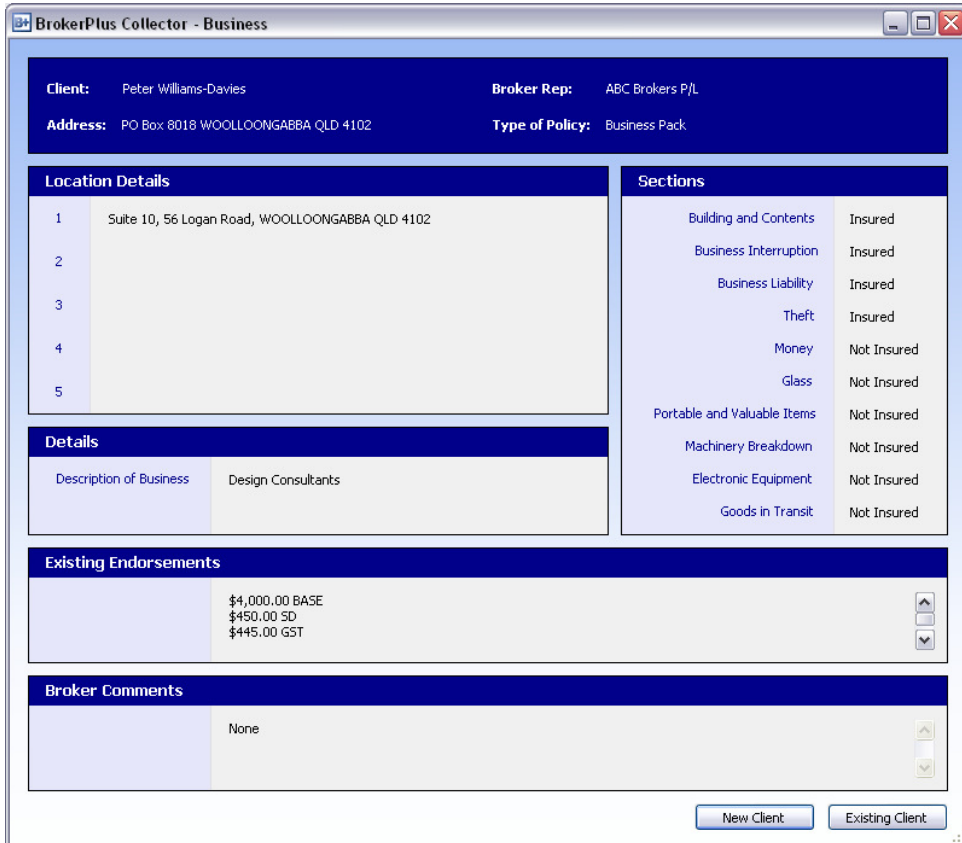
Answers to each question can be restricted to list of "approved" values & can also be marked as mandatory



Real-time Email Notification

Once the user submits the quote details, BrokerPlus Collector immediately generates an email to the nominated email address attaching a file containing all the data entered on the website

The email is addressed from the website user, so the BrokerPlus user can easily confirm receipt of their quotation

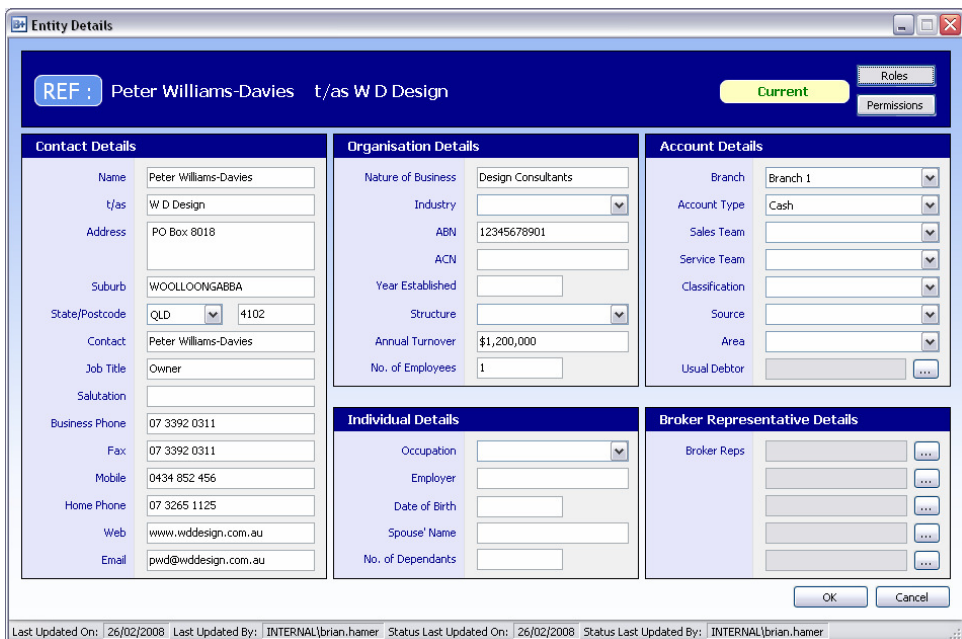


Quote Summary

Once the user opens the email attachment the BrokerPlus Collector Quotation Summary screen is displayed giving summary details of the quote & allow the user to determined whether or not this is an existing Client

Selecting Existing Client will allow the user to add the new quotation details to an existing clients BrokerPlus record

All data is populated into the BrokerPlus workbooks, allowing the user to generate Quotation Letters, New Business Invoices, Closings & Receipting etc without having to rekey the data



No Rekeying of Data

New Existing Client will create a new record in BrokerPlus, automatically populating all appropriate fields with the data entered on the website

Data can be added or amended as necessary during the creation of the Client, Policy & Workbook record

All data is populated into the BrokerPlus workbooks, allowing the user to generate Quotation Letters, New Business Invoices, Closings & Receipting etc without having to rekey the data

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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Insurance Website: www.naqinsurance.com.au