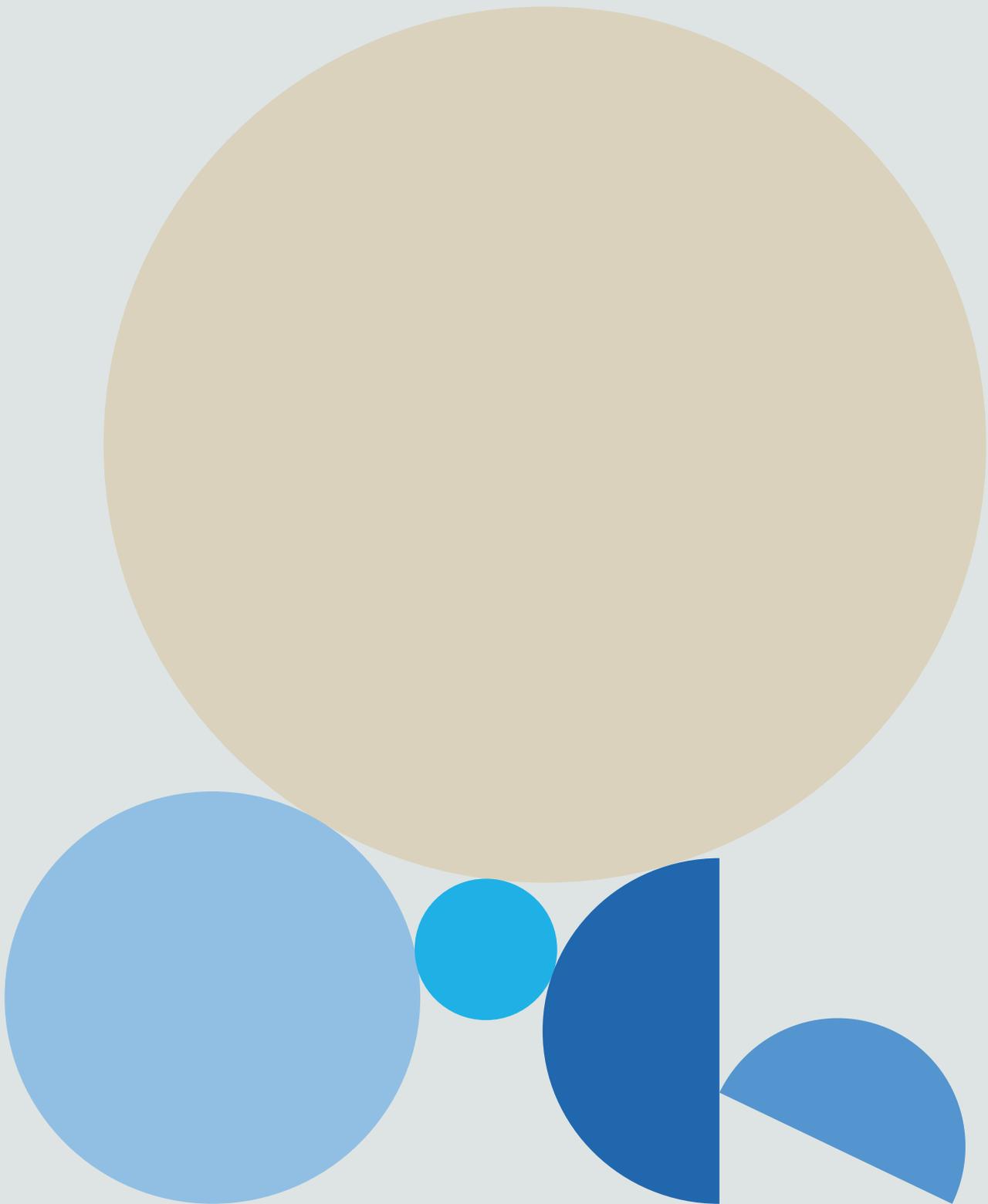


Zurich Business Online (ZBO)

Processing Updates and Enhancements



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Effective date	12/09/24
Approver	Robin Brennan
Version	1.0
Summary of changes	Feature updates and enhancements

1. Processing Updates

1.1. Stock in the Open

The stock item 'All other stock/work in progress sum insured' automatically covers stock in the open and the policy wording states this in the definition of Stock.

Stock

Stock and materials in trade in or at the described premises and in the open adjoining the property of **You** or held by **You** in trust for which **You** are responsible.

Therefore, there is no need to specifically include a sum in 'Stock in open sum insured'

Note: It is subject to the terms conditions and exclusions on the policy, e.g. damage to moveable property in the open caused by wind, rain, hail, sleet, snow, flood or dust is excluded; also, theft cover is excluded.

1.2. Changing Cover Dates (before binding the policy) – from the overview screen

If you need to change the cover dates (before binding the policy) from the Overview screen, make sure you click 'Update' to ensure the correct dates are reflected in the quote or policy.

Click 'Edit' on Overview screen

The screenshot shows the Zurich 'Quote Overview' for 'Commercial Combined' policy K-UAT-0018298. The 'Cover Duration' section is highlighted with a red circle around the 'Edit' button. The 'Property Damage' section is also visible, showing various risks and their coverage status.

Section	Value
Total Premium (Total Premium (Incl. Commission and Levy))	€3,751.84
Commission amount	€714.64
Quote number	K-UAT-0018298
Status	New Business Quote Obtained
Cover from	10/06/2024
Cover to	11/08/2025

Risk	Coverage
Section premium	€50440
Business Interruption 'All Risks'	Not Included
Business 'All Risks'	Not Included
Computer	Not Included
Goods In Transit	Not Included
Money	Included

Enter cover start dates and click 'Update'. Note: wait until the spinning wheel stops before continuing.

ZURICH

Quote Overview K-UAT-0018298
Commercial Combined

Overview

Client: GreatDesign
Agency name: Zurich Insurance Test Agency (Sam Maguire)
Broker phone number

Total Premium: €3,751.84
Total Premium (incl. Commission and Levy)
Commission amount: €714.64

Quote number: K-UAT-0018298
Status: New Business Quote Obtained

Cover Duration: **Update**

Cover from: 12.09.2024
Cover to: 11.09.2025

Cover Summary | Pricing | Policy details | Endorsements | Alternative Quotes

Property Damage **View**

Section premium	€504.40
Business Interruption 'All Risks'	Not Included
Business 'All Risks'	Not Included
Computer	Not Included
Goods In Transit	Not Included
Money	Included

The updated cover dates are now saved

ZURICH

Quote Overview K-UAT-0018298
Commercial Combined

Overview

Client: GreatDesign
Agency name: Zurich Insurance Test Agency (Sam Maguire)
Broker phone number

Total Premium: €3,751.84
Total Premium (incl. Commission and Levy)
Commission amount: €714.64

Quote number: K-UAT-0018298
Status: New Business Quote Obtained

Cover Duration: **Edit**

Cover from: 12.09.2024
Cover to: 11.09.2025

Cover Summary | Pricing | Policy details | Endorsements | Alternative Quotes

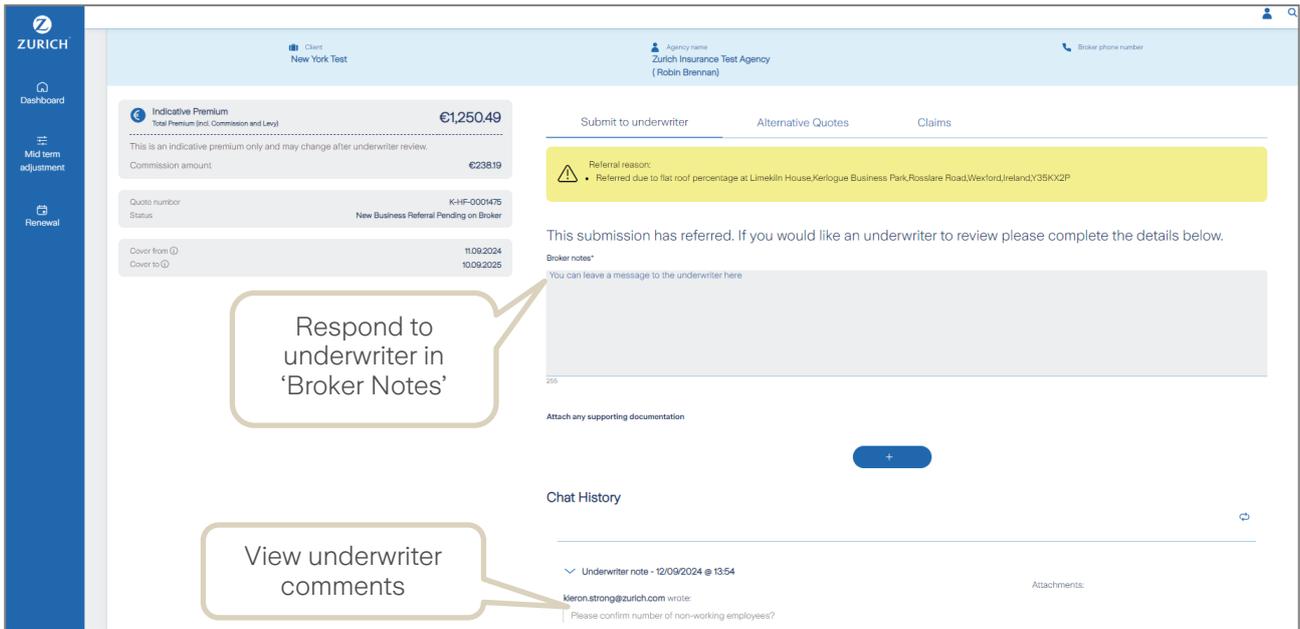
Property Damage **View**

Section premium	€504.40
Business Interruption 'All Risks'	Not Included
Business 'All Risks'	Not Included
Computer	Not Included
Goods In Transit	Not Included
Money	Included

1.3. Referral Process – use ‘Broker notes’ to respond to underwriter

If an underwriter requires more information during the referral process, they will post a comment to ZBO (you’ll be notified of this by email). Use ‘Broker notes’ for any contact rather than directly emailing the underwriter.

Use ‘Broker notes’ to respond to the underwriter



1.4. Using Relay Cloud – prompts two logins

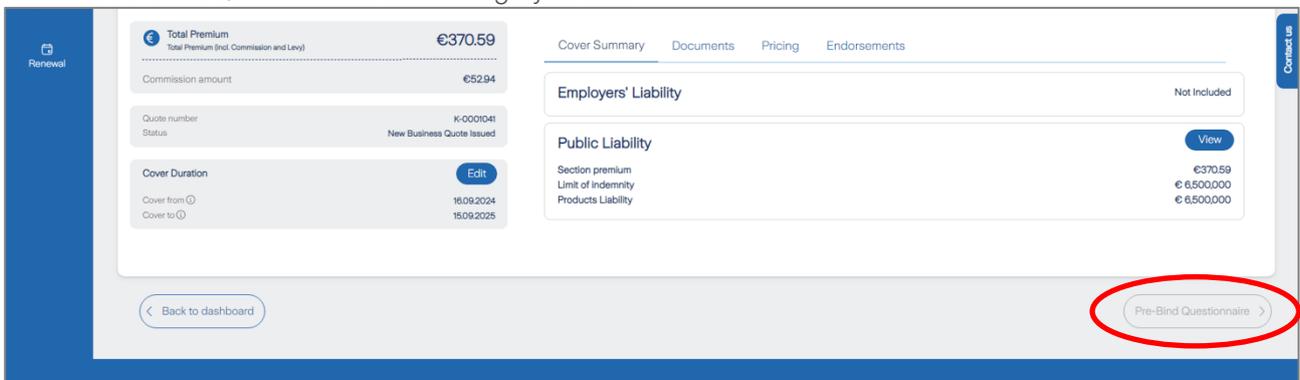
If you use Relay Cloud, when accessing ZBO you will be prompted to log in twice (this includes entering the six digit code). Once to access the Broker Hub and the second time when accessing ZBO from the Broker Hub. To get the best experience we recommend accessing ZBO outside of the Relay Cloud setup.

1.5. Quote issued and unable to bind – ‘Pre-Bind Questionnaire’ button unavailable

After you have issued a quote and then notice the ‘Pre-Bind Questionnaire’ button is greyed out, it means you are currently unable to bind the quote. This may occur when the quote documents have not updated in the system.

To resolve this - navigate to the ‘Documents’ tab and click ‘Retrieve documents’. This will update the system that the quote documents have been generated (you might see this screenshot and click ‘Retry’ once). The ‘Pre-Bind Questionnaire’ button will now be available to select and continue the bind process.

1. Pre-Bind Questionnaire button is greyed out.



2. Navigate to ‘Documents’ tabs and click ‘Retrieve Documents’.

Cover Summary

Documents

Pricing

[Link to your Policy Document](#)

[Retrieve documents](#)

2. Feature enhancements

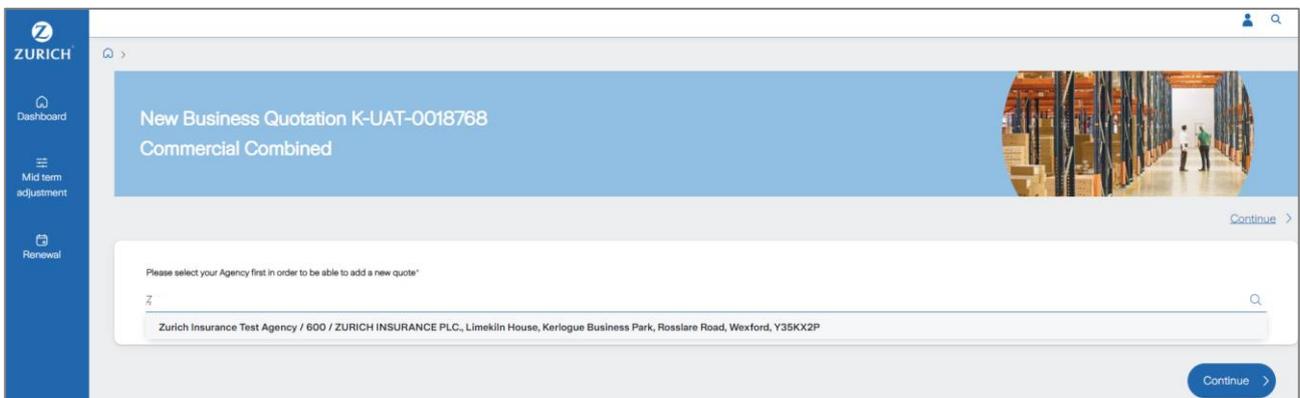
2.1. Theft Cover

Theft cover is now included by default in the Commercial Combined Policy. With this enhancement – the ability to choose 'Burglary Required' during the quote process is no longer required, and this button will now be removed.

2.2. Search Improvement – selecting your office

Initially, a minimum of three characters needed to be inputted into the search field to view a drop down list of search results. Now just click the search field to view a drop down list, or type in one character to view a drop down of search results.

Click on search field to view all results, or enter only 1 character to view drop down list of search results



The screenshot displays the Zurich insurance portal interface. On the left, a blue sidebar contains the Zurich logo and navigation links for 'Dashboard', 'Mid term adjustment', and 'Renewal'. The main content area has a light blue header with the text 'New Business Quotation K-UAT-0018768' and 'Commercial Combined', accompanied by a warehouse image and a 'Continue >' link. Below this, a message reads 'Please select your Agency first in order to be able to add a new quote'. A search field contains the letter 'z', and a dropdown menu shows the result: 'Zurich Insurance Test Agency / 600 / ZURICH INSURANCE PLC., Limekiln House, Kerlogue Business Park, Rosslare Road, Wexford, Y35KX2P'. A 'Continue >' button is located at the bottom right of the search field.