



# eGlobal WebAccess

## Overview

A new era in information access and client management has arrived with eGlobal WebAccess. Using easy to navigate browser technology, WebAccess compliments native processing facilities of your eGlobal system.

WebAccess opens new doors for information distribution and client management within your organisation. It has particular relevance for management, non processing staff and inquiry users.

**Functionality**

- Client Inquiry and Update
- Client Accounting Inquiry
- Detailed Policy Inquiry
- WebForm Inquiry
- Premium Detail Inquiry
- Insurer on Cover Inquiry
- Claims Inquiry and Update
- Sub Agent Inquiry
- Third Party Broker Inquiry
- Transaction Inquiry
- Diary Access and Update
- Client Notes



In addition to inquiry facilities, WebAccess offers comprehensive policy documentation management and reprint options. Invoices, policy schedules, closings, claim documents and client statements can be reprinted in PDF or sent via email through integration with your desktop email system.

## Client Information

Locating key client data has never been easier; standard search options include abbreviated name, client, policy and claim number searches and a new Global Client search facility to display relevant client data. Users can retrieve key client data, financial status, turnover information, client address and individual contact details, client notes, sub agent and third party broker information with links to all policies and claims.

An update facility is available to update core client information such as name, address, phone numbers and primary contact email address. Updates to the database occur in real time and are immediately available to all other users of your eGlobal system.

Client management is simplified with easy access to individual client contacts displaying phone numbers and email address as well as position



Client Contacts - SOUTH SEAS						
Name	Salutation	Position	Phone	Fax	Email	Date Of Birth
James Carter	Mr	Managing Director	(02) 9255-0010		james.carter@southseas.com.au	26/03/1955
Karl Nixon	Mr	Finance Director	(02) 9255-0024	(02) 9255-0099	karl.nixon@southseas.com.au	12/01/1940
Alisha Reberger	Ms	Company Secretary	(02) 9255-0036	(02) 9255-0099	alisha.reberger@southseas.com.au	16/09/1978



and date of birth. Selecting an email hyperlink launches your default email system and populates the email address fields.

WebAccess client management features a powerful transaction inquiry option, a Notes feature to record client instructions and important information plus full integration with the Diary including update and the option to create a new Diary entry.

Company	Branch	Client No	Ref No	Name	Narrative	Description	Follow up Date	Action Date
DEM	NSW	S9005		South Seas Shipping Pty Ltd	Chase client	Clients - Client Meetings-Monthly	12/03/2002	

Navigation options are available to inquire on policies and claims, associated files or add time cost entries through integration with the optional eGlobal Time Recording System.

## Policy Inquiry

The policy inquiry facility displays the current version of all covers for a client in a policy grid showing type of risk, renewal date, transaction type, insurer, invoice number, premium amount and payment status.

A policy hyperlink is available to drill down on either a particular policy or display all versions of that cover. Using the drill down features, a user can see premium, insurer and payment details

plus all details captured for the policy by displaying a complete image of the eGlobal WebForm.

Current and Future Annual Premium information can be displayed for each policy version showing premium, levies and fees. Payment history, including reference, description, payment method and user reference are available. The individual Transaction Inquiry shows debtor and creditor accounting details for the cover including amount paid and amount outstanding, bank deposit details as well as amounts owed to or paid to the insurers on cover.

Insurer details include insurers on cover, proportion of risk, insurer policy number, settlement status, premiums, levy, and commission details.

Access to the Diary assists with task management and workflow. In addition Associated File access is available to link external documents and record additional cover information.

Management of client and insurer documentation is available through document reprint, PDF and email options. Policy documentation including the invoice, policy schedules, insurer closing and other insurer documentation can be converted to PDF and displayed.

Transactions						
Version Detail	Premiums	Payments	Insurers	Documents	Associated Files	Diary
<b>Policy Details - AUSTRALIAN CYCLING F for Cover - 0034900 / 000</b>						
<b>Effective Date</b>	09/08/2006	<b>Invoice</b>	I00042197			
<b>Renewal Date</b>	09/08/2007	<b>Total Due</b>	12,694.55			
<b>Risk</b>	LQGYM	<b>Payment Status</b>	UnPaid			
<b>Cover Type</b>	Open Market	<b>Entered By</b>	Leon			
<b>Instalment Inv</b>	No	<b>Multi Client</b>	No			
<b>Direct Billed</b>	No	<b>Provisional Bill</b>	No			
<b>Premium Funded</b>	No	<b>Reinsured Cover</b>	No			
<b>eLink Cover</b>	No	<b>Servicer</b>	Leon			
<b>Currency</b>	AUD	<b>Department</b>	CA			
<b>Income Class</b>	NEW	<b>FSRA Type</b>	None			
<b>PDS Sent</b>		<b>Client Referral</b>	No			
<b>Sunrise</b>	No	<b>Payment Due</b>	8/09/2007			
<b>Transaction Description</b>						
<b>Miscellaneous Details</b>						
	<b>Code</b>	<b>Percentage</b>	<b>Amount</b>			
<b>Third Party Broker</b>	ELITE BRKS - NSW	15.00 %	\$ 1,225.90			



## Claims

Claims inquiry and update options are available. In Inquiry mode, information for a client is displayed in grid showing date of loss, risk, lead insurer details, claims status and loss detail. A hyperlink provides drill down to the detail of the claim displaying additional information, associated financial details, Claims Notes, associated files and Diary items relating to the claim.

Payment status of the policy as well as other relevant claim information including loss details, date reported, status, claim category, estimates, deductible details, recoveries, assessor's fees and depreciation amounts are also displayed.

A hyperlink is available to take the user directly to version of the policy to which the claim applies to verify financial status or check coverage details.

## Insurers

Search options are available to display all relevant insurer information including Head Office profile, primary location, Terms of Trade, Security Rating, GST and other accounting reference details. Access to Insurer Notes allows recording of any important details.

AGENCY CLAIMS - Claim - 0004280 AGENCY CLAIMS				
<b>Date of Loss</b>	17/01/2007	<b>At Fault</b>	Act of God	
<b>Reported On</b>	17/01/2007	<b>Status</b>	OUTSTANDING	
<b>Net Loss</b>	10,000.00	<b>Category</b>	Wind Storm	
<b>Client Reference</b>		<b>Sub Status</b>	Awaiting Assessor	
<b>Risk</b>	HOUSEHOLDERS ~	<b>Sub Cover</b>	HOUSEHOLDERS ~	
<b>Loss Details</b>				
TV damaged in Fire				
<b>Associated Cover Details</b>				
<b>Cover Number</b>	<b>Period of Insurance</b>	<b>Risk</b>	<b>Lead Insurer</b>	<b>Pay Status</b>
0034540	17/01/2007	HOUSEHOLDERS ~	Zurich Australian Insurance Limited	OUTSTANDING

AGENCY CLAIMS - Claim - 0004280 AGENCY CLAIMS				
<b>Date of Loss</b>	17/01/2007	<b>At Fault</b>	Act of God	
<b>Reported On</b>	17/01/2007	<b>Status</b>	OUTSTANDING	
<b>Net Loss</b>	10,000.00	<b>Category</b>	Wind Storm	
<b>Client Reference</b>		<b>Sub Status</b>	Awaiting Assessor	
<b>Risk</b>	HOUSEHOLDERS ~	<b>Sub Cover</b>	HOUSEHOLDERS ~	
<b>Claim Amounts</b>				
Estimate		10,000.00 GST/VAT		0.00
Deductible		0.00 Recovery		0.00
Net Loss		10,000.00 Third Party Recovery Date		
Paid To Date		0.00 Assessor Fees		
Settlement Amount		0.00 Depreciation		0.00
Expense Estimate		0.00 Date Settled		
Expense Paid To Date		0.00 Total Incurred		10,000.00
<b>Estimate History</b>				
<b>Number</b>	<b>Date</b>	<b>Estimate Amount</b>	<b>Expense Estimate</b>	<b>Done By</b>
2101	17/01/2007	10,000.00	0.00	Leon
<b>Claim Payments</b>				





The option to drill down to obtain Insurer Branch details is available to access address and general contact details, specific Terms of Trade where this varies from Head Office rules, payment and bank account details.

Insurer contact management is facilitated through the Contacts tab which displays individual details – name, position, phone and

email address. New insurer contacts can be added within WebAccess.

Insurer details can be accessed both by Insurer Inquiry and by linking to insurers on cover at policy level.

Profile - QBE Insurance Limited			
<b>Head Office Code</b>	QBE	<b>Short Name</b>	QBE INSURANCE
<b>Full Name</b>	QBE Insurance Limited	<b>Allow Brok Rate Change</b>	Yes
<b>Active</b>	Yes	<b>Levies Only</b>	No
<b>GST Registered</b>	Yes	<b>Overseas Insurer</b>	No
<b>Address 1</b>	GPO Box 4108	<b>Address 2</b>	
<b>Address 3</b>	SYDNEY	<b>Address 4</b>	AUSTRALIA
<b>Postal Code</b>	2001	<b>State Code</b>	NSW
<b>Payment Method</b>	None	<b>Bank Account</b>	89988
<b>Settlement Period</b>	90 Days From Effective Date	<b>Settle Unpaid</b>	No
<b>Security Rating</b>	OK to Use	<b>Security Message</b>	
<b>Lloyds</b>	No	<b>Australian Agent</b>	Yes
<b>NRT Rate</b>	0	<b>ABN/GST/VAT Number</b>	89 987 657 343
<b>Price Waterhouse</b>	No	<b>WHT Tax</b>	0
<b>Actual Insurer</b>	No	<b>eBorderaux</b>	-1
<b>Accumulation Code</b>		<b>Accumulation Name</b>	

Profile QBE Insurance Limited			
<b>Insurer Code</b>	QBE	<b>Insurer Short Name</b>	QBE INSURANCE
<b>Branch Code</b>	SYD	<b>Branch Short Name</b>	QBE SYDNEY
<b>Full Name</b>	QBE Insurance Limited	<b>Active</b>	Yes
<b>Address Line 1</b>	Level 10	<b>Postal Address 1</b>	GPO Box 4108
<b>Address Line 2</b>	George Street	<b>Postal Address 2</b>	
<b>Address Line 3</b>	SYDNEY	<b>Postal Address 3</b>	SYDNEY
<b>Address Line 4</b>	NSW2000	<b>Postal Address 4</b>	NSW2001
<b>Phone Number 1</b>	02 9877 4000	<b>Phone Number 2</b>	
<b>Email</b>	info@qbeinsurance.com.au	<b>Fax</b>	02 9867 3999
<b>Settlement Period</b>	Refer to Head Office	<b>Settle Unpaid</b>	No
<b>Pay To</b>		<b>Registration ID</b>	028 7678 8
<b>Direct Billed Insurer</b>	No	<b>Direct Billed Client</b>	
<b>Account Basis</b>	Invoice	<b>Next CertNo</b>	5
<b>Payment Method</b>	None	<b>Bank Account</b>	27658

Insurer Contacts - QBE Insurance Limited					
<a href="#">Add New</a>					
Name	Salutation	Position	Phone	Fax	Email
Joesph March	Joe	Underwriter	8928 0001	8928 0000	jmarch@qbe.com.au



## Management Reports

Users with the appropriate level of security have access to a user friendly reporting tool that allows creation of customised reports.

Reports can be developed accessing specific client and policy information with selection criteria on each of the fields selected. For example a report could be generated listing all clients with a particular class of risk where the premium exceeded \$10,000.

Sorting criteria is available to assist with analysis of data returned from queries.

This flexible reporting tool can be used for ad hoc queries or to develop reports that can be saved and run on demand.

Output is either to the screen in preview or spreadsheet mode or the results of a query can be saved in Excel spreadsheet format.

## Security

WebAccess is supported by a comprehensive security model controlling system access. Standard eGlobal Company / Branch security restricts user access to specific operating divisions within the organisation.



Welcome to eGlobal Web Access

User Name

Password

eGlobal  
WebAccess

### Management Reports

View Saved Query
Save Current Query

Reset
Preview

**Extract Fields**

Name Postal Address Line 1 Postal Address Line 2 Postal Address Line 3	>> <<	Name Cover Number Version Number Transaction Type
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**Criteria**

Field: Premium Is: Greater than Value: 10,000	>> <<	Premium is Greater than 10,000
---	----------	--------------------------------

**Sort By**

Name Cover Number Version Number Transaction Type	>> <<	Name
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	A	B	C
1	<b>NAME</b>	<b>INVOICENUMBER</b>	<b>PREMIUM</b>
2	Agar Antiques Pty Ltd	42235	6,069.00
3	Australian Cycling Federation	42196	10,000.00
4	Australian Cycling Federation	42197	8,172.66
5	Carlton United Breweries Limited	42237	6,069.00
6	Coopers & Associates Pty Ltd	42085	3,164.00
7	Coopers & Associates Pty Ltd	42096	1,500.00
8	Northside Fitness Centre	42115	7,776.00
9	South Seas Shipping Pty Ltd	42195	10,000.00
10	South Seas Shipping Pty Ltd	42175	2,000.00
11	South Seas Shipping Pty Ltd	42155	4,000.00
12	South Seas Shipping Pty Ltd	42135	2,500.00

# eGlobal WebAccess



A user profile defines functional and data level access to WebAccess and uses the same logon and password as standard eGlobal.

## Diary

Users have full access to the eGlobal Diary to manage tasks and activity including the ability to action and add new Diary items.

Supporting Diary use are Diary Reports available by servicer by date for un-actioned, actioned or all diary items.

## Other Features

Access to profile, policy and contact details for Third Party Brokers and Authorised Representatives is available through direct inquiry or using hyperlinks from a policy transaction.

Profile   Contacts   Associated Files   **Diary**   Notes   Transactions

### Follow up Diaries for SOUTH SEAS

[Add New](#)

Unactioned    Actioned    All

Company	Branch	Client	Ref No	Name	Narrative	Description	Follow up Date	Action Date
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### Diary Reports

Servicer:

Report Date (DD/MM/YYYY):  [Update](#)

**Unactioned Items Only**

Actioned Items Only

All Items

Description	Code	Number
Broking - Prepare Quote/Policy Wordings	B002	1
Clients - Client Meetings-Monthly	CS00	1
All - General Follow Up Items	G001	1
System Generated - Policies Due for Renewal	ZZZ1	7
System Generated - No Evidence Of Cover	ZZZ3	8
System Generated - Completed Proposal Outstanding	ZZZ4	8
System Generated - Policy Document Not Sent	ZZZ5	8
System Generated - Premium Warranty Due To Expire	ZZZA	4