

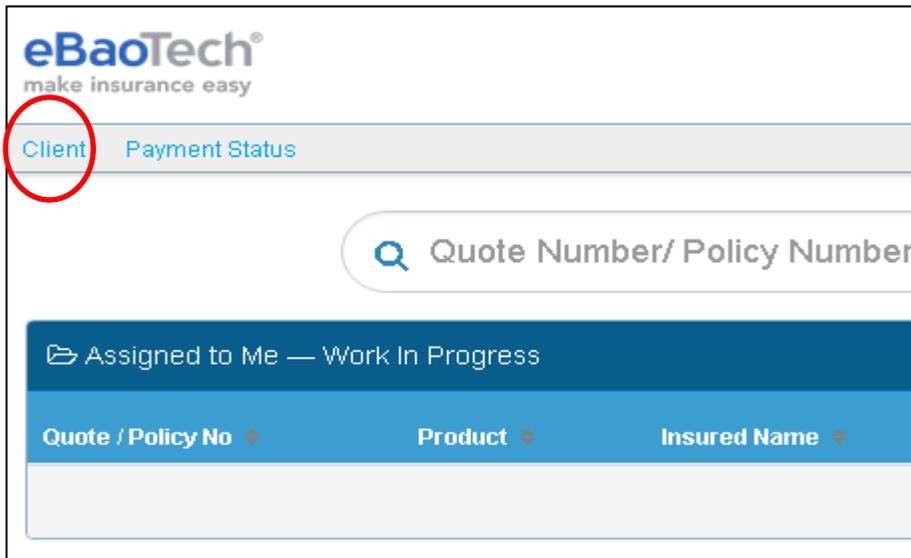


Edge Underwriting BROKER WORKBENCH user hints

Always use **GOOGLE CHROME** to access the Edge workbench



A **Client** needs to be set up to be able to submit a quotation for any product in the Edge workbench. Once a **Client** is set up it can be used for multiple quotes across multiple products



Click **CLIENT**, drop down of **CLIENT** will appear



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make insurance easy

Client Payment Status

Client

Quote Number/ Policy Number/

Assigned to Me — Work In Progress

Quote / Policy No	Product	Insured Name
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Click CLIENT,
Search to see if a CLIENT already exists
Or
Click Add Client to start adding the details of the insured

Intermediary Name

Edge Underwriting

Add Client Clear Search

Add Client

Client Type*

Client Id*

Country*

Name*

Intermediary Name*

External CRM Name 1

External CRM Client id 1

External CRM Name 2

External CRM Client id 2

Client Website

Note

Addresses

Address Type

Address Line 1

Address Line 2

Suburb

State

Post Code

Actions

No records found

Contacts

Contact Role/Title

First Name

Middle

Last Name

Phone

Email

Fax

Actions

No records found

View Details **New Quote**

Click **NEW QUOTE** to start a quote

Policy Details

Product	Please select...	Package Type	Please select...
Client Name	Insured	Insured Name	Insured
Policy Start Date	21/11/2018	Policy End Date	21/11/2019
Currency	Australian Dollar		

Transaction Actions

- Add Risk Details**
- Portal Actions
- Return

Transaction Details

Transaction Type	Quote	First Processed By
Transaction Status	Unfinished	Last Modified By
		Last Modified Date

Click **ADD RISK DETAILS**

Follow the prompts and always click on **NEXT** buttons