

Marine Cargo Insurance

Quick Reference Guide



Z.streamXpress



Z.streamXpress – Zurich Marine Cargo Insurance

Z.streamXpress now includes a range of Marine Cargo products, delivering Marine Cargo insurance with speed and efficiency. This quick reference guide has been developed to give you a brief snapshot of some of the functionality available within the system. For more information, please refer to your detailed Reference Guide or speak with your Zurich representative.

Z.streamXpress Seamless & convenient

Navigation Menu

QN000115023-1 New Business Quote

Quote/Policy number

Annual Marine Cargo

Import quotes, select accounts and add risks here

Local 1

Import 1

Export 1

Enter risk details here – there are three types of risk class: Local, Import and Export. Each risk class has its own risk details page.

Insured details

Search for an ABN and enter Insured details here

Interested parties

Enter any interested party details here

Premium summary

This is an overall snapshot of total premium payable as well as premium per risk

Underwriting questions

Answer general underwriting questions here. All questions must be answered on this screen before quote acceptance

Complete

View policy dates, select schedules to print and change the Renewal Invitation delivery method here

Attachments

Add any attachments onto the quote/policy here

Alerts

An “X” flag  in the navigation menu alerts you to the mandatory information that is missing. A description of the missing information is displayed at the top of the respective screen

A red asterisk  indicates the mandatory fields required to complete the transaction

A green flag  on the navigation menu indicates that the referral has been approved

A red flag  on the navigation menu indicates that a referral has been generated and requires actioning by Zurich

A red flag with a cross  on the navigation menu indicates that a referral has been declined

Save & Exit

Save

The Save option allows you to intermittently save your work without exiting

Exit

This exits the transaction – any unsaved data will be lost

Import Quote

If you have launched a New Quote transaction, you may have the ability to import risk details from a previous quote provided by Zurich. **Note:** The quote must have been quoted manually by a Zurich Underwriter or a Webdirect user and the piece of business must have been quoted on your electronic account.

On the “Annual Marine Cargo” screen, select “Yes” to the Import Quote question and enter in the quote number e.g. QN0001012-1 and press “Import quote details”

Risks

The Risks section allows you to select individual risk classes. You can select multiple risks for each risk class by clicking on the arrows.

Tips

- **The keyboard is quicker than the mouse.** When processing, Tab forward to get to the next available field for completion/selection. To go backwards use Shift + Tab together
- **Review the help functions.** These fields offer valuable information such as product specific text and assistance to help you with processing. Select the ? icons to open up the help panels
- **Drop down selections.** When in a drop down box, if you are familiar with the contents just enter the first character of the item you wish to select i.e. “N” = “No”
- **Google Maps.** Use the Google Maps function to check the location of the risk – “street view” (where available) can assist in risk assessment
- **Save as You Go.** Save your work as you go to prevent loss of data by pressing the “Save” button in the top right hand corner of the screen

Bottom Panel

< Previous

Allows you to navigate to the previous screen

Add referral

Allows you to add a manual referral for review by Zurich

Add page notes

Allows you to add general page notes. These **do** print on the policy documents

Net rate

Allows you to net rate the quote/policy

Standard commission

Allows you to re-apply standard commission to the quote/policy

Calculate

The yellow alert indicates that a calculation is required

Next >

Allows you to navigate to the next screen

Done

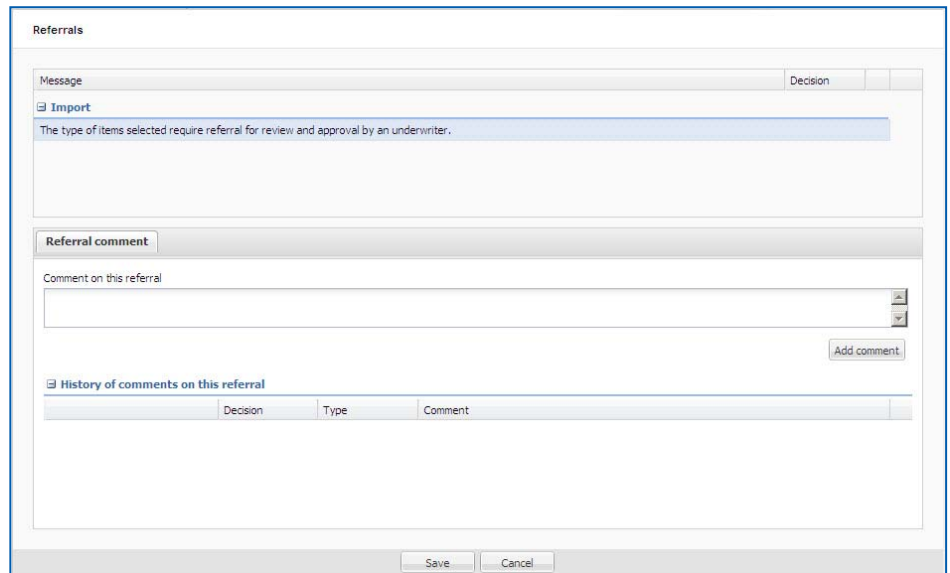
Select “Done” to complete the transaction. This will automatically take you back to your broking system

Referrals

Where a red referral flag is shown on the left hand navigation panel the transaction must be referred to Zurich for review.

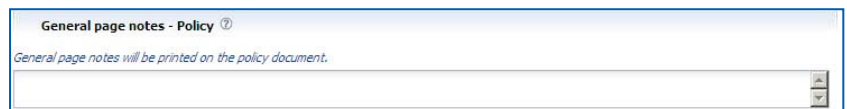
To review the referral details, click on the  **Referral** icon and you will be presented with specific details relating to the referral.

If you would like to add comments to the referral, click on the specific referral in the referral popup and enter your comments in the box provided. Once you have finished writing your comments, click "Add comment" and then click "Save".



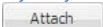
General Page Notes

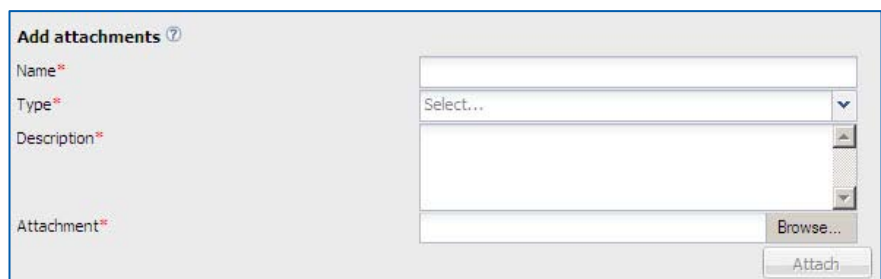
General page notes can be added whenever the "Add page notes" button appears. These notes **do** print on policy documents. The use of general page notes requires Zurich acceptance and will generate a referral.



Attaching Documents

Documents can be attached to the policy transaction via the attachments section:

- Enter the name of the document
- Select the document type from the drop down list
- Enter a description of the document
- Select "Browse..." to attach from a directory on your PC
- Click  to complete the process



Enhancements to your Z.stream experience....

1. **Flexible Navigation:** You can freely move between risk screens without the need to complete all data
2. **Attachments:** You can now add attachments such as documents and photos to your quote/policy
3. **Google Maps:** Enter the risk location and Google Maps will show you the risk location on the Google Maps website
4. **Quote Upload Functionality:** This enables you to import quotes created by Zurich
5. **Save as You Go:** Save your work as you go which will prevent loss of data