1 P&C NO MOTOR

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| Scene ID 🔒 | 521ab215-e5b0-42ea-b372-320909714de6 |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| LCM | Scene name | P&C NO MOTOR | P&C NO MOTOR |

1.1 Welcome

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| Slide ID 🔒 | ac559266-11c4-4c9e-895e-09ed19ecb64e |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| J7Y | Slide name | Welcome | Welcome |
| LGo | Text Box 1 | **P&C NO MOTOR** | **P&C NO MOTOR** |
| aic | Text Box 2 | Welcome to the course on P&C NO MOTOR | Welcome to the course on P&C NO MOTOR |
| eO4 | Rectangle 2 - Normal state | START | START |
| MqA | Slide Notes | Welcome to the P&C NO MOTOR course. | Welcome to the P&C NO MOTOR course. |

1.2 Learning Objectives

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| Slide ID 🔒 | 797483c9-684a-4c99-b4f8-0c92ec15b398 |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| oZ4 | Slide name | Learning Objectives | Learning Objectives |
| xCY | Text Box 6 | Learning Objectives | Learning Objectives |
| y2c | Text Box 5 | 1**DURATION:**  21 hour  3**STRUCTURE:**  45 modules | **DURATION:** |
| y2c | 1 hour |
| y2c | **STRUCTURE:** |
| y2c | 5 modules |
| h10 | Text Box 2 | At the end of this course you will be able to: | At the end of this course you will be able to: |
| Q6A | Text Box 3 | * 1enter the necessary data to issue * 2new NO MOTOR quote and policy * 3 on the Global Building Payer product * 4make a * 5general amendment * 6 * 7make some * 8common data amendments * 9 * 10enter the necessary data to make a * 11policy substitution * 12enter the necessary data to make a * 13policy cancellation | enter the necessary data to issue |
| Q6A | new NO MOTOR quote and policy |
| Q6A | on the Global Building Payer product |
| Q6A | make a |
| Q6A | general amendment |
| Q6A |  |
| Q6A | make some |
| Q6A | common data amendments |
| Q6A |  |
| Q6A | enter the necessary data to make a |
| Q6A | policy substitution |
| Q6A | enter the necessary data to make a |
| Q6A | policy cancellation |
| f1c | Slide Notes | 1This course lasts about one hour and it is divided into five modules.  2At the end of this course you will be able to:   * + 3enter the necessary data to issue new NO MOTOR quote and policy on the Global Building Payer product   + 4make a general amendment   + 5make some common data amendments   + 6enter the necessary data to make a policy substitution   + 7enter the necessary data to make a policy cancellation | This course lasts about one hour and it is divided into five modules. |
| f1c | At the end of this course you will be able to: |
| f1c | enter the necessary data to issue new NO MOTOR quote and policy on the Global Building Payer product |
| f1c | make a general amendment |
| f1c | make some common data amendments |
| f1c | enter the necessary data to make a policy substitution |
| f1c | enter the necessary data to make a policy cancellation |

2 P&C NO MOTOR Quote & Policy Issues

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| Scene ID 🔒 | 09caa2c8-64a5-4224-9713-711c86af9534 |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| kIs | Scene name | P&C NO MOTOR Quote & Policy Issues | P&C NO MOTOR Quote & Policy Issues |

2.1 Welcome

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| --- | --- |
| Slide ID 🔒 | 4019c557-273e-47a3-a079-6a689c1c5605 |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| ReI | Slide name | Welcome | Welcome |
| JNA | Text Box 1 | 1**P&C NO MOTOR**  2**Quote & Policy Issues** | **P&C NO MOTOR** |
| JNA | **Quote & Policy Issues** |
| B1Y | Text Box 2 | In this module you will have an overview on NO MOTOR quote and policy issues. | In this module you will have an overview on NO MOTOR quote and policy issues. |
| ++E | Text Box 3 | **MODULE 1** | **MODULE 1** |
| HpQ | Rectangle 2 - Normal state | START | START |
| bG4 | Slide Notes | 1Welcome to the P&C NO MOTOR Quote and Policy Issues module.  2In this module you will have an overview on NO MOTOR quote and policy issues. | Welcome to the P&C NO MOTOR Quote and Policy Issues module. |
| bG4 | In this module you will have an overview on NO MOTOR quote and policy issues. |

2.2 Learning Objectives

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| --- | --- |
| Slide ID 🔒 | 19001452-6b45-4723-b1a1-7d8d9fed2800 |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| 4Q8 | Slide name | Learning Objectives | Learning Objectives |
| 6TI | Text Box 4 | Learning Objectives | Learning Objectives |
| i6w | Text Box 2 | At the end of this module, you will be able to understand: | At the end of this module, you will be able to understand: |
| nkc | Text Box 3 | * 1how to enter the * 2necessary data * 3to issue a * 4new NO MOTOR quote * 5on the Global Building Payer product * 6how to enter the * 7necessary data * 8to issue a * 9new NO MOTOR policy * 10 on a Global Building Payer product | how to enter the |
| nkc | necessary data |
| nkc | to issue a |
| nkc | new NO MOTOR quote |
| nkc | on the Global Building Payer product |
| nkc | how to enter the |
| nkc | necessary data |
| nkc | to issue a |
| nkc | new NO MOTOR policy |
| nkc | on a Global Building Payer product |
| XlA | Slide Notes | 1At the end of this module you will be able to understand:   * 2how to enter the necessary data to issue a new NO MOTOR quote on the Global Building Payer product * 3how to enter the necessary data to issue a new NO MOTOR policy on a Global Building Payer product | At the end of this module you will be able to understand: |
| XlA | how to enter the necessary data to issue a new NO MOTOR quote on the Global Building Payer product |
| XlA | how to enter the necessary data to issue a new NO MOTOR policy on a Global Building Payer product |

2.3 New P&C Quote

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| --- | --- |
| Slide ID 🔒 | a5456e98-befc-4b18-b9f4-a3724f0dc6fa |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| qvY | Slide name | New P&C Quote | New P&C Quote |
| DQQ | Text Box 3 | New P&C Quote | New P&C Quote |
| ke4 | Text Box 2 | 1How to enter the necessary data to issue a new  2NO MOTOR quote  3 on the Global Building Payer product | How to enter the necessary data to issue a new |
| ke4 | NO MOTOR quote |
| ke4 | on the Global Building Payer product |
| KQA | Text Box 4 | * new NO MOTOR quote issue flow | new NO MOTOR quote issue flow |
| Ivo | Slide Notes | Let’s start by seeing how to enter the necessary data to issue a new NO MOTOR quote on the Global Building Payer product. | Let’s start by seeing how to enter the necessary data to issue a new NO MOTOR quote on the Global Building Payer product. |

2.4 New NO MOTOR quote issue

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| --- | --- |
| Slide ID 🔒 | 4462fd82-9872-46ab-86f8-2285fad6fcc6 |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| M6c | Slide name | New NO MOTOR quote issue | New NO MOTOR quote issue |
| z04 | Text Box 2 | New NO MOTOR Quote Issue | New NO MOTOR Quote Issue |
| EWw | Rectangle 3 | 1The default value of the payment frequency and its value list depends on how the product has been configured on PASS\_Products.  2Being a quote, the policyholder’s data is not mandatory, differently from what happens with the issue of a policy. | The default value of the payment frequency and its value list depends on how the product has been configured on PASS\_Products. |
| EWw | Being a quote, the policyholder’s data is not mandatory, differently from what happens with the issue of a policy. |
| pOk | Slide Notes | 1Let's start with issuing a quote for the "Global Building Payer" product: from the “New Quote” card we enter the Company and the Sale Point (if it does not coincide with the login point), we confirm the proposed effective date and we search for the name of the product, then we click on <CONTINUE>.  2In the Policy Data Page, within the Technical Details section, we confirm the Payment Frequency, which is set by default with “Annual”, then we choose the Currency (”Euro”).  3The default value of the payment frequency and its value list depends on how the product has been configured on PASS\_Products.  4Being a quote, the policyholder’s data is not mandatory, differently from what happens with the issue of a policy. | Let's start with issuing a quote for the "Global Building Payer" product: from the “New Quote” card we enter the Company and the Sale Point (if it does not coincide with the login point), we confirm the proposed effective date and we search for the name of the product, then we click on <CONTINUE>. |
| pOk | In the Policy Data Page, within the Technical Details section, we confirm the Payment Frequency, which is set by default with “Annual”, then we choose the Currency (”Euro”). |
| pOk | The default value of the payment frequency and its value list depends on how the product has been configured on PASS\_Products. |
| pOk | Being a quote, the policyholder’s data is not mandatory, differently from what happens with the issue of a policy. |

2.5 Assets page

|  |  |
| --- | --- |
| Slide ID 🔒 | 99e61cc7-8296-46eb-9f63-41a6de284c0a |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| iXE | Slide name | Assets page | Assets page |
| tZ0 | Text Box 1 | Assets Page | Assets Page |
| Qdk | Text Box 2 | 1In the  2Assets page  3we must enter the  4 mandatory data  5in order to  6calculate the quotation  7 which is defined by the product configuration on PASS\_Products | In the |
| Qdk | Assets page |
| Qdk | we must enter the |
| Qdk | mandatory data |
| Qdk | in order to |
| Qdk | calculate the quotation |
| Qdk | which is defined by the product configuration on PASS\_Products |
| D4M | Rectangle 2 | at the top of the page, there is a “navigator” which highlights which step of the flow you are in | at the top of the page, there is a “navigator” which highlights which step of the flow you are in |
| rRo | Slide Notes | 1In the Assets page we must enter the mandatory data in order to calculate the quotation which is defined by the product configuration on PASS\_Products.  2For this product, the mandatory data of assets “home” are:   * 3the Residence (housing situation) * 4the House Type * 5the Property of the Insured Party * 6the Year of construction of the building   7Once all the data has been entered, we still have the option of entering another home by selecting «Add asset», otherwise we can go on, clicking on <CONTINUE>.  8It should be noted that at the top of the page, there is a “navigator” which highlights which step of the flow you are in. | In the Assets page we must enter the mandatory data in order to calculate the quotation which is defined by the product configuration on PASS\_Products. |
| rRo | For this product, the mandatory data of assets “home” are: |
| rRo | the Residence (housing situation) |
| rRo | the House Type |
| rRo | the Property of the Insured Party |
| rRo | the Year of construction of the building |
| rRo | Once all the data has been entered, we still have the option of entering another home by selecting «Add asset», otherwise we can go on, clicking on <CONTINUE>. |
| rRo | It should be noted that at the top of the page, there is a “navigator” which highlights which step of the flow you are in. |

2.6 Quotation page (1/5)

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| --- | --- |
| Slide ID 🔒 | c7806fae-83c3-4604-a8de-b287df972662 |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| rsE | Slide name | Quotation page (1/5) | Quotation page (1/5) |
| YWo | Text Box 1 | Quotation Page | Quotation Page |
| ukQ | Text Box 2 | 1On the  2quotation page  3we select the units to include in our quote issue | On the |
| ukQ | quotation page |
| ukQ | we select the units to include in our quote issue |
| P3Q | Rectangle 3 | Each of them contains a further accordion in which are placed the asset data whose visibility, mandatoriness, and/or default depend on the selection of the Unit or of Units clauses | Each of them contains a further accordion in which are placed the asset data whose visibility, mandatoriness, and/or default depend on the selection of the Unit or of Units clauses |
| qJo | Slide Notes | 1We arrive at the quotation page, where we select the units to include in our quote issue.  2The page is divided into many accordions as there are instances of assets added by the user.  3Each of them contains a further accordion in which are placed the asset data whose visibility, mandatoriness, and/or default depend on the selection of the Unit or Units clauses and then many other accordions how many are the Unit configured on the product (possibly grouped in sections, if required by the product configuration).  4Each Unit contains the data relevant to the premium definition: variables and clauses.  5The accordion is represented by the “+” button, clicking on the button it is possible to open or close this accordion. | We arrive at the quotation page, where we select the units to include in our quote issue. |
| qJo | The page is divided into many accordions as there are instances of assets added by the user. |
| qJo | Each of them contains a further accordion in which are placed the asset data whose visibility, mandatoriness, and/or default depend on the selection of the Unit or Units clauses and then many other accordions how many are the Unit configured on the product (possibly grouped in sections, if required by the product configuration). |
| qJo | Each Unit contains the data relevant to the premium definition: variables and clauses. |
| qJo | The accordion is represented by the “+” button, clicking on the button it is possible to open or close this accordion. |

2.7 Quotation page (2/5)

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| --- | --- |
| Slide ID 🔒 | 90a8132f-22d7-4f47-90ec-458107e0530c |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| eos | Slide name | Quotation page (2/5) | Quotation page (2/5) |
| Lt0 | Text Box 1 | Quotation Page | Quotation Page |
| W+0 | Rectangle 2 | 1Depending on the product configuration the units may be presented already selected by default.  2If they are mandatory, it will not be possible to deselect them. | Depending on the product configuration the units may be presented already selected by default. |
| W+0 | If they are mandatory, it will not be possible to deselect them. |
| 4nE | Slide Notes | 1When a unit is selected the box that represents it is presented as colored, otherwise, it is presented as "white".  2Just click on the cover to select the unit.  3Depending on the product configuration the units may be presented already selected by default.  4If they are mandatory, it will not be possible to deselect them. | When a unit is selected the box that represents it is presented as colored, otherwise, it is presented as "white". |
| 4nE | Just click on the cover to select the unit. |
| 4nE | Depending on the product configuration the units may be presented already selected by default. |
| 4nE | If they are mandatory, it will not be possible to deselect them. |

2.8 Quotation page (3/5)

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| --- | --- |
| Slide ID 🔒 | 94b8cbc3-4217-4d21-9cb5-425ed375b949 |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| 4fo | Slide name | Quotation page (3/5) | Quotation page (3/5) |
| tqw | Text Box 2 | Quotation Page | Quotation Page |
| Ywg | Text Box 3 | 1To get a total quotation it is necessary to  2complete the data of all the units  3to be purchased | To get a total quotation it is necessary to |
| Ywg | complete the data of all the units |
| Ywg | to be purchased |
| JDE | Slide Notes | To get a total quotation it is necessary to complete the data of all the units to be purchased. | To get a total quotation it is necessary to complete the data of all the units to be purchased. |

2.9 Quotation page (4/5)

|  |  |
| --- | --- |
| Slide ID 🔒 | 925bad7b-735a-4940-85df-f3f8c8a96a9e |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| 1Lg | Slide name | Quotation page (4/5) | Quotation page (4/5) |
| Zg0 | Text Box 2 | Quotation Page | Quotation Page |
| uqM | Rectangle 3 | using the “Recalculate” button, the premium will be calculated considering the unit and the insured sums | using the “Recalculate” button, the premium will be calculated considering the unit and the insured sums |
| x94 | Rectangle 3 | 1If units that cannot be combined have been chosen, or data that is not consistent with the product rate is entered,  2**the system warns with special blocking messages**  3, highlighted in red at the bottom of the screen and **it is not possible to continue** | If units that cannot be combined have been chosen, or data that is not consistent with the product rate is entered, |
| x94 | **the system warns with special blocking messages** |
| x94 | , highlighted in red at the bottom of the screen and **it is not possible to continue** |
| NvM | Slide Notes | 1We now must choose the payment frequency and click on <RECALCULATE> in order to make the quotation.  2Using the “Recalculate" button, the premium will be calculated considering the unit and the insured sums.  3Mandatory units are represented with a padlock.  4If units that cannot be combined have been chosen, or data that is not consistent with the product rate is entered, the system warns with special blocking messages, highlighted in red at the bottom of the screen.  5In this case, it is not possible to continue (the <CONTINUE> button is not present). | We now must choose the payment frequency and click on <RECALCULATE> in order to make the quotation. |
| NvM | Using the “Recalculate" button, the premium will be calculated considering the unit and the insured sums. |
| NvM | Mandatory units are represented with a padlock. |
| NvM | If units that cannot be combined have been chosen, or data that is not consistent with the product rate is entered, the system warns with special blocking messages, highlighted in red at the bottom of the screen. |
| NvM | In this case, it is not possible to continue (the <CONTINUE> button is not present). |

2.10 Quotation page (5/5)

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| --- | --- |
| Slide ID 🔒 | 108e3bde-c986-464c-a8b5-99fabf18f42c |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| dsI | Slide name | Quotation page (5/5) | Quotation page (5/5) |
| jPM | Text Box 2 | Quotation Page | Quotation Page |
| NPQ | Rectangle 3 | * 1Gross premium and installment premium * 2RECALCULATE button, to update the quotation * 3Button to show Discounts detail * 4DETAILS button dedicated to collecting Premium Details * 5Fees perceived by the contract management node * 6Detail of contributions and taxes | Gross premium and installment premium |
| NPQ | RECALCULATE button, to update the quotation |
| NPQ | Button to show Discounts detail |
| NPQ | DETAILS button dedicated to collecting Premium Details |
| NPQ | Fees perceived by the contract management node |
| NPQ | Detail of contributions and taxes |
| mWc | Slide Notes | 1Anchored at the top of the page, always visible, there is a box showing:   * 2Gross premium and installment premium; * 3RECALCULATE button, to update the quotation; * 4Button to show Discounts detail; * 5DETAILS button dedicated to collecting Premium Details; * 6Fees perceived by the contract management node; * 7Detail of contributions and taxes.   8If, on the other hand, the data entered is correct, the system proposes the calculated premium and the <CONTINUE> button appears below to proceed with the issue. | Anchored at the top of the page, always visible, there is a box showing: |
| mWc | Gross premium and installment premium; |
| mWc | RECALCULATE button, to update the quotation; |
| mWc | Button to show Discounts detail; |
| mWc | DETAILS button dedicated to collecting Premium Details; |
| mWc | Fees perceived by the contract management node; |
| mWc | Detail of contributions and taxes. |
| mWc | If, on the other hand, the data entered is correct, the system proposes the calculated premium and the <CONTINUE> button appears below to proceed with the issue. |

2.11 Applicant Personal Data

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| --- | --- |
| Slide ID 🔒 | e1e7815d-d3f4-4760-8464-8aa966f51e05 |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| lbc | Slide name | Applicant Personal Data | Applicant Personal Data |
| 1Sg | Text Box 2 | Applicant Personal Data | Applicant Personal Data |
| fbw | Rectangle 2 | the system will save a new proposal with the data we have inserted for the issue quotes | the system will save a new proposal with the data we have inserted for the issue quotes |
| tPw | Slide Notes | 1Now we have the chance to insert the Applicant Personal Data, which are not mandatory fields.  2We can choose between the <SAVE NEW> button and <SAVE PROPOSAL>.  3If we click on <SAVE PROPOSAL>, the system will save a new proposal with the data we have inserted for the issue quotes.  4If, on the other hand, we click on <SAVE NEW>, the system will save a new quote, with its progressive identification number. | Now we have the chance to insert the Applicant Personal Data, which are not mandatory fields. |
| tPw | We can choose between the <SAVE NEW> button and <SAVE PROPOSAL>. |
| tPw | If we click on <SAVE PROPOSAL>, the system will save a new proposal with the data we have inserted for the issue quotes. |
| tPw | If, on the other hand, we click on <SAVE NEW>, the system will save a new quote, with its progressive identification number. |

2.12 New P&C Policy

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| Slide ID 🔒 | ca8746a3-525b-4302-9301-50c7bae2c2b8 |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| +Ng | Slide name | New P&C Policy | New P&C Policy |
| ev8 | Text Box 2 | New P&C Policy | New P&C Policy |
| 7K0 | Text Box 3 | 1How to enter the necessary data to issue a new  2NO MOTOR policy  3on the Global Building Payer product | How to enter the necessary data to issue a new |
| 7K0 | NO MOTOR policy |
| 7K0 | on the Global Building Payer product |
| nYc | Text Box 4 | * new NO MOTOR policy issue flow (new contract) | new NO MOTOR policy issue flow (new contract) |
| F7U | Slide Notes | Let’s see now how to enter the necessary data to issue a new NO MOTOR policy on a Global Building Payer product. | Let’s see now how to enter the necessary data to issue a new NO MOTOR policy on a Global Building Payer product. |

2.13 New NO MOTOR proposal (1/4)

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| --- | --- |
| Slide ID 🔒 | f9dc2380-4b47-4af4-b307-c269764bba6c |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| zRs | Slide name | New NO MOTOR proposal (1/4) | New NO MOTOR proposal (1/4) |
| kF4 | Text Box 2 | New NO MOTOR Proposal | New NO MOTOR Proposal |
| vjw | Rectangle 3 | 1**Policyholders:**   * 2it contains a party who performs the role of the Policyholder and CO-policyholders * 3the product configuration defines also if the policyholder must be a natural person, legal person or both   4In this flow, unlike the quote, it is a mandatory section, and the subjects must be researched and/or registered in PassParty. | **Policyholders:** |
| vjw | it contains a party who performs the role of the Policyholder and CO-policyholders |
| vjw | the product configuration defines also if the policyholder must be a natural person, legal person or both |
| vjw | In this flow, unlike the quote, it is a mandatory section, and the subjects must be researched and/or registered in PassParty. |
| +Wc | Rectangle 7 | **Technical data:** contains static data always required (e.g. due date, expiration date, etc.) and static data required only if expected by the configuration of the product (e.g. the premium adjustment, indexing, etc.). | **Technical data:** contains static data always required (e.g. due date, expiration date, etc.) and static data required only if expected by the configuration of the product (e.g. the premium adjustment, indexing, etc.). |
| 5xk | Slide Notes | 1Now let's see how to issue a new NO MOTOR proposal on the “Global Building Payer” product.  2Starting from the «P&C New Contract» Card, we must select the company and the Sale Point (if it does not coincide with the login point), set the effective date (pre-compiled on the system's date) and the product, and select <Next>.  3The Damage Proposal-Policy Data page is divided into four sections with collapsible specific accordion:  4Policyholders: it contains a party who performs the role of the Policyholder and, if permitted by the configuration of the product, CO-policyholders; the product configuration defines also if the policyholder must be a natural person, legal person or both.  5In this flow, unlike the quote, it is a mandatory section, and the subjects must be researched and/or registered in PassParty.  6Technical data: contains static data always required (for example, due date, expiration date, etc.) and static data required only if expected by the configuration of the product (for example, the premium adjustment, indexing, etc.). | Now let's see how to issue a new NO MOTOR proposal on the “Global Building Payer” product. |
| 5xk | Starting from the «P&C New Contract» Card, we must select the company and the Sale Point (if it does not coincide with the login point), set the effective date (pre-compiled on the system's date) and the product, and select <Next>. |
| 5xk | The Damage Proposal-Policy Data page is divided into four sections with collapsible specific accordion: |
| 5xk | Policyholders: it contains a party who performs the role of the Policyholder and, if permitted by the configuration of the product, CO-policyholders; the product configuration defines also if the policyholder must be a natural person, legal person or both. |
| 5xk | In this flow, unlike the quote, it is a mandatory section, and the subjects must be researched and/or registered in PassParty. |
| 5xk | Technical data: contains static data always required (for example, due date, expiration date, etc.) and static data required only if expected by the configuration of the product (for example, the premium adjustment, indexing, etc.). |

2.14 New NO MOTOR proposal (2/4)

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| --- | --- |
| Slide ID 🔒 | 4370d297-2440-4c4a-848d-de33f6b91889 |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| u6I | Slide name | New NO MOTOR proposal (2/4) | New NO MOTOR proposal (2/4) |
| xAI | Text Box 2 | New NO MOTOR Proposal | New NO MOTOR Proposal |
| OGk | Rectangle 3 | if we do not find the desired subject, then the system gives us the possibility (allows) to enter a new one | if we do not find the desired subject, then the system gives us the possibility (allows) to enter a new one |
| vYM | Slide Notes | 1We search for the subject within the registry, by means of surname and/or first name or Subject Unique Key (different depending on the country), and then we click on <FIND>.  2Once we have found the subject, we select him/her by clicking on the “Actions” arrow.  3If we do not find the desired subject, then the system gives us the possibility (allows) to enter a new one.  4For more details about adding a new person to Party, see the PassParty Functional unit. | We search for the subject within the registry, by means of surname and/or first name or Subject Unique Key (different depending on the country), and then we click on <FIND>. |
| vYM | Once we have found the subject, we select him/her by clicking on the “Actions” arrow. |
| vYM | If we do not find the desired subject, then the system gives us the possibility (allows) to enter a new one. |
| vYM | For more details about adding a new person to Party, see the PassParty Functional unit. |

2.15 New NO MOTOR proposal (3/4)

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| --- | --- |
| Slide ID 🔒 | 10baca16-f796-498b-838b-fdac012d81c1 |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| uxo | Slide name | New NO MOTOR proposal (3/4) | New NO MOTOR proposal (3/4) |
| vZY | Text Box 2 | New NO MOTOR Proposal | New NO MOTOR Proposal |
| Mgg | Rectangle 3 | This is presented by the system with an effective date + default duration (defined on PASS\_ Products) but can be modified. The system checks that the new value entered is consistent with the PASS\_Products configuration | This is presented by the system with an effective date + default duration (defined on PASS\_ Products) but can be modified. The system checks that the new value entered is consistent with the PASS\_Products configuration |
| SCo | Rectangle 5 | 1The list of Agreement is populated based on:   * 2the agreements associated with the Policy Management Node and valid on Effective Date entered * 3the agreements valid on the effective date entered and linked to the product | The list of Agreement is populated based on: |
| SCo | the agreements associated with the Policy Management Node and valid on Effective Date entered |
| SCo | the agreements valid on the effective date entered and linked to the product |
| q7w | Rectangle 10 | 1The  2**Coinsurance**  3field is visible only if it is configured on the product with a value different from "Not allowed" on the property “Co-insurance”. The default is dependent on product configuration | The |
| q7w | **Coinsurance** |
| q7w | field is visible only if it is configured on the product with a value different from "Not allowed" on the property “Co-insurance”. The default is dependent on product configuration |
| 5QE | Rectangle 7 | In case of Temporary or Single payment frequency, the system removes any indexation from the contract and prevents the user from redirecting, disabling their fields | In case of Temporary or Single payment frequency, the system removes any indexation from the contract and prevents the user from redirecting, disabling their fields |
| /4Q | Slide Notes | 1After inserting the subject, we can see that now the system has compiled the «Subscriber» field with the name and the surname of the subject.  2A few more details on the Technical data.  3In addition to the effective date, it is necessary to fill in the expiry date. This is presented by the system with an effective date + default duration (defined on PASS\_Products) but can be modified. The system checks that the new value entered is consistent with the PASS\_Products configuration.  4The list of Agreement is populated based on:   * 5the agreements associated with the Policy Management Node and valid on Effective Date entered; * 6the agreements valid on the effective date entered and linked to the product.   7If there are no agreements available the field is not visible.  8The possible values of Payment Frequency are configured on the product. In case of Temporary or Single payment frequency, the system removes any indexation from the contract and prevents the user from redirecting, disabling their fields.  9The Coinsurance field: visible only if it is configured on the product with a value different from "Not allowed" on the property “Co-insurance”. The default is dependent on product configuration.  10The Tacital Renewal is visible only if it is configured on the product with a value different from "No" on the property. | After inserting the subject, we can see that now the system has compiled the «Subscriber» field with the name and the surname of the subject. |
| /4Q | A few more details on the Technical data. |
| /4Q | In addition to the effective date, it is necessary to fill in the expiry date. This is presented by the system with an effective date + default duration (defined on PASS\_Products) but can be modified. The system checks that the new value entered is consistent with the PASS\_Products configuration. |
| /4Q | The list of Agreement is populated based on: |
| /4Q | the agreements associated with the Policy Management Node and valid on Effective Date entered; |
| /4Q | the agreements valid on the effective date entered and linked to the product. |
| /4Q | If there are no agreements available the field is not visible. |
| /4Q | The possible values of Payment Frequency are configured on the product. In case of Temporary or Single payment frequency, the system removes any indexation from the contract and prevents the user from redirecting, disabling their fields. |
| /4Q | The Coinsurance field: visible only if it is configured on the product with a value different from "Not allowed" on the property “Co-insurance”. The default is dependent on product configuration. |
| /4Q | The Tacital Renewal is visible only if it is configured on the product with a value different from "No" on the property. |

2.16 New NO MOTOR proposal (4/4)

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| --- | --- |
| Slide ID 🔒 | b22e26ec-896f-4cb0-8d89-0fd8a43022cd |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| ptc | Slide name | New NO MOTOR proposal (4/4) | New NO MOTOR proposal (4/4) |
| EPs | Text Box 2 | New NO MOTOR Proposal | New NO MOTOR Proposal |
| P0Y | Rectangle 3 | When the customer pays an advance premium and a deferred premium known as the regulatory premium at the end of each regulatory period (generally annual) according to variable elements taken as a basis for calculation | When the customer pays an advance premium and a deferred premium known as the regulatory premium at the end of each regulatory period (generally annual) according to variable elements taken as a basis for calculation |
| pJ8 | Rectangle 3 | **Questionnaires:** contains the list of product questionnaires and is only present if the questionnaire has been attached to the product in question. It is only displayed if there is at least one product-level associated questionnaire for which the inclusion condition is verified | **Questionnaires:** contains the list of product questionnaires and is only present if the questionnaire has been attached to the product in question. It is only displayed if there is at least one product-level associated questionnaire for which the inclusion condition is verified |
| A8Y | Slide Notes | 1Depending on the product configuration, the system presents one or more sections relating to information which complete that the policy data and defines other characteristics.  2In particular:   * 3Proposal Regulation: when the customer pays an advance premium and a deferred premium known as the regulatory premium at the end of each regulatory period (generally annual) according to variable elements taken as a basis for calculation. In case of adjustment, it is necessary to enter the required mandatory data (for example Annual) and Regulation Type (for example Automatic calculation, total). * 4Common Risk Policies * 5Complementary Policies * 6Indirect coinsurance * 7Second risk policies * 8Linked policies   9If configured on the product they are also present:   * 10Factors and clauses of Product * 11Questionnaires: contains the list of product questionnaires and is only present if the questionnaire has been attached to the product in question. It is only displayed if there is at least one product-level associated questionnaire for which the inclusion condition is verified. For further specifications refer to the Questionnaires module.   12Now we click on <CONTINUE>. | Depending on the product configuration, the system presents one or more sections relating to information which complete that the policy data and defines other characteristics. |
| A8Y | In particular: |
| A8Y | Proposal Regulation: when the customer pays an advance premium and a deferred premium known as the regulatory premium at the end of each regulatory period (generally annual) according to variable elements taken as a basis for calculation. In case of adjustment, it is necessary to enter the required mandatory data (for example Annual) and Regulation Type (for example Automatic calculation, total). |
| A8Y | Common Risk Policies |
| A8Y | Complementary Policies |
| A8Y | Indirect coinsurance |
| A8Y | Second risk policies |
| A8Y | Linked policies |
| A8Y | If configured on the product they are also present: |
| A8Y | Factors and clauses of Product |
| A8Y | Questionnaires: contains the list of product questionnaires and is only present if the questionnaire has been attached to the product in question. It is only displayed if there is at least one product-level associated questionnaire for which the inclusion condition is verified. For further specifications refer to the Questionnaires module. |
| A8Y | Now we click on <CONTINUE>. |

2.17 Asset selection popup

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| Slide ID 🔒 | a33681b9-fdd2-4aed-ad33-b83fbbc6be93 |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| oGw | Slide name | Asset selection popup | Asset selection popup |
| cLA | Text Box 2 | Asset Selection Popup | Asset Selection Popup |
| 5js | Text Box 3 | 1The  2asset selection popup  3appears  4only in the case of multi-asset products  5 for which it is not configured with a minimum number of instances greater than 0 on at least one asset | The |
| 5js | asset selection popup |
| 5js | appears |
| 5js | only in the case of multi-asset products |
| 5js | for which it is not configured with a minimum number of instances greater than 0 on at least one asset |
| DcQ | Text Box 4 | 1otherwise,  2the system directly displays the Asset Data page  3 in which there is already an instance of the only present asset with a minimum number of instances higher than 0 | otherwise, |
| DcQ | the system directly displays the Asset Data page |
| DcQ | in which there is already an instance of the only present asset with a minimum number of instances higher than 0 |
| bcc | Slide Notes | 1The asset selection popup appears only in the case of multi-asset products for which it is not configured with a minimum number of instances greater than 0 on at least one asset. Otherwise, the system directly displays the Asset Data page in which there is already an instance of the only present asset with a minimum number of instances higher than 0.  2Once the asset has been selected, continue by clicking on the button <SELECT>. | The asset selection popup appears only in the case of multi-asset products for which it is not configured with a minimum number of instances greater than 0 on at least one asset. Otherwise, the system directly displays the Asset Data page in which there is already an instance of the only present asset with a minimum number of instances higher than 0. |
| bcc | Once the asset has been selected, continue by clicking on the button <SELECT>. |

2.18 Assets Data page

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| --- | --- |
| Slide ID 🔒 | 70f1bf2f-b33f-4f51-af19-cd3bf7e6c95e |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| MMc | Slide name | Assets Data page | Assets Data page |
| dYg | Text Box 1 | Asset Data Page | Asset Data Page |
| AFM | Rectangle 2 | * 1the Assets Data page is divided into **many accordions** as there are asset instances added by the user * 2each accordion has **more sections** to group asset data: parties, addresses, activities, variables, clauses and questionnaires * 3the **visibility** and content of the accordion **may depend on the product configuration** | the Assets Data page is divided into **many accordions** as there are asset instances added by the user |
| AFM | each accordion has **more sections** to group asset data: parties, addresses, activities, variables, clauses and questionnaires |
| AFM | the **visibility** and content of the accordion **may depend on the product configuration** |
| I40 | Slide Notes | 1The Assets Data page is divided into many accordions as there are asset instances added by the user.  2Each accordion has more sections to group asset data: parties, addresses, activities, variables, clauses and questionnaires.  3The visibility and content of the accordion may depend on the product configuration.  4In the case of our Global Building Payer product, the system requires:   * 5Insured subject (based on the configuration of the product, the subject can be searched/registered on PassParty or simply be registered as a policy subject), * 6Address insured party, * 7Residence (for example Occasional Residence), * 8House Type (for example Condominium), * 9Property of insured party (for example «yes»), * 10Year of construction of the building.   11Now we can save the Proposal, or add another asset (button enabled only if only in case of multi-asset product), or go back or continue. We click on <CONTINUE>. | The Assets Data page is divided into many accordions as there are asset instances added by the user. |
| I40 | Each accordion has more sections to group asset data: parties, addresses, activities, variables, clauses and questionnaires. |
| I40 | The visibility and content of the accordion may depend on the product configuration. |
| I40 | In the case of our Global Building Payer product, the system requires: |
| I40 | Insured subject (based on the configuration of the product, the subject can be searched/registered on PassParty or simply be registered as a policy subject), |
| I40 | Address insured party, |
| I40 | Residence (for example Occasional Residence), |
| I40 | House Type (for example Condominium), |
| I40 | Property of insured party (for example «yes»), |
| I40 | Year of construction of the building. |
| I40 | Now we can save the Proposal, or add another asset (button enabled only if only in case of multi-asset product), or go back or continue. We click on <CONTINUE>. |

2.19 Quotation page (1/3)

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| Slide ID 🔒 | 3801b143-6552-4860-8427-048dfc64a750 |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| lrw | Slide name | Quotation page (1/3) | Quotation page (1/3) |
| qPk | Text Box 2 | Quotation Page | Quotation Page |
| +L4 | Text Box 3 | * 1the page is divided into * 2many accordions * 3 * 4each of them contains a * 5further accordion * 6in which are placed the asset data whose visibility, mandatoriness, and/or default and * 7 many other accordions * 8how many are the Units configured on the product * 9each Unit contains the data relevant to the premium definition: * 10variables and clauses | the page is divided into |
| +L4 | many accordions |
| +L4 |  |
| +L4 | each of them contains a |
| +L4 | further accordion |
| +L4 | in which are placed the asset data whose visibility, mandatoriness, and/or default and |
| +L4 | many other accordions |
| +L4 | how many are the Units configured on the product |
| +L4 | each Unit contains the data relevant to the premium definition: |
| +L4 | variables and clauses |
| PAI | Rectangle 4 | 1To get a total quotation it is necessary to complete the data of all the units to be purchased  2If during the quotation the system also carries out checks on the data entered with respect to what is configured on the product | To get a total quotation it is necessary to complete the data of all the units to be purchased |
| PAI | If during the quotation the system also carries out checks on the data entered with respect to what is configured on the product |
| 1ys | Slide Notes | 1Once the assets have been entered and the factors requested by the system have been compiled, we arrive at the quotation page.  2The page, as seen in the previous stream, is divided into many accordions as there are instances of assets added by the user.  3Each of them contains a further accordion in which are placed the asset data whose visibility, mandatoriness, and/or default depending on the selection of the Unit or of Units clauses and then many other accordions (or blocks, when units are displayed as blocks) how many are the Units configured on the product (possibly grouped in sections, if required by the product configuration).  4Each Unit contains the data relevant to the premium definition: variables and clauses.  5The accordion is represented by the “+” button, by clicking on the button it is possible to open or close this accordion.  6For the first entry on the quotation page, the system already performs a calculation of the premium, if at least one unit is selected, and if it has all the necessary data for the quotation.  7In this way - if the user does not change any data - can proceed directly to the saving.  8As seen in the previous flow, when a unit has selected the box that represents it is presented as colored, otherwise, it is presented as "white".  9Just click on the cover to select the unit.  10Depending on the product configuration the units may be presented already selected by default.  11If a unit cannot be listed, for various reasons (e.g. for saleability rules), it has the abbreviation N.C. and will not be selectable  12As we have seen previously in the flow of new quote issues, to get a total quotation it is necessary to complete the data of all the units to be purchased.  13If during the quotation the system also carries out checks on the data entered with respect to what is configured on the product.  14If there are incorrect situations, it highlights them with the alert symbol. | Once the assets have been entered and the factors requested by the system have been compiled, we arrive at the quotation page. |
| 1ys | The page, as seen in the previous stream, is divided into many accordions as there are instances of assets added by the user. |
| 1ys | Each of them contains a further accordion in which are placed the asset data whose visibility, mandatoriness, and/or default depending on the selection of the Unit or of Units clauses and then many other accordions (or blocks, when units are displayed as blocks) how many are the Units configured on the product (possibly grouped in sections, if required by the product configuration). |
| 1ys | Each Unit contains the data relevant to the premium definition: variables and clauses. |
| 1ys | The accordion is represented by the “+” button, by clicking on the button it is possible to open or close this accordion. |
| 1ys | For the first entry on the quotation page, the system already performs a calculation of the premium, if at least one unit is selected, and if it has all the necessary data for the quotation. |
| 1ys | In this way - if the user does not change any data - can proceed directly to the saving. |
| 1ys | As seen in the previous flow, when a unit has selected the box that represents it is presented as colored, otherwise, it is presented as "white". |
| 1ys | Just click on the cover to select the unit. |
| 1ys | Depending on the product configuration the units may be presented already selected by default. |
| 1ys | If a unit cannot be listed, for various reasons (e.g. for saleability rules), it has the abbreviation N.C. and will not be selectable |
| 1ys | As we have seen previously in the flow of new quote issues, to get a total quotation it is necessary to complete the data of all the units to be purchased. |
| 1ys | If during the quotation the system also carries out checks on the data entered with respect to what is configured on the product. |
| 1ys | If there are incorrect situations, it highlights them with the alert symbol. |

2.20 Quotation page (2/3)

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| Slide ID 🔒 | a5785eca-7803-41f0-93dc-946c5ff22684 |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| Gtk | Slide name | Quotation page (2/3) | Quotation page (2/3) |
| gp0 | Text Box 2 | Quotation Page | Quotation Page |
| 2Eo | Slide Notes | 1Whenever the chosen units or the value of a factor is changed, the top premium resets.  2Using the “Recalculate" button, the premium will be calculated considering the unit and the insured sums.  3Mandatory units are represented with a padlock, it will not be possible to deselect them.  4If units that cannot be combined have been chosen, or data that is not consistent with the product rate is entered, the system warns with special blocking messages, highlighted in red on the screen.  5In this case, it is not possible to continue (the button <Continue> is not present).  6After selecting the decider unit, we have to click on «RECALCULATE», in order to calculate the premium. If we don’t click on «Recalculate», the system doesn’t allow us to continue. | Whenever the chosen units or the value of a factor is changed, the top premium resets. |
| 2Eo | Using the “Recalculate" button, the premium will be calculated considering the unit and the insured sums. |
| 2Eo | Mandatory units are represented with a padlock, it will not be possible to deselect them. |
| 2Eo | If units that cannot be combined have been chosen, or data that is not consistent with the product rate is entered, the system warns with special blocking messages, highlighted in red on the screen. |
| 2Eo | In this case, it is not possible to continue (the button <Continue> is not present). |
| 2Eo | After selecting the decider unit, we have to click on «RECALCULATE», in order to calculate the premium. If we don’t click on «Recalculate», the system doesn’t allow us to continue. |

2.21 Quotation page (3/3)

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| --- | --- |
| Slide ID 🔒 | 5f6b050f-bfe0-44d8-8c08-b5e66b923634 |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| m14 | Slide name | Quotation page (3/3) | Quotation page (3/3) |
| QsM | Text Box 2 | Quotation Page | Quotation Page |
| Wic | Rectangle 3 | When the asset is configured to provide that the successive instances of the asset inherit the data from the first one, the first instance is represented in classic mode (with all accordion planned), while the latter contains only the accordion of the asset data and a message informing the user of heredity. | When the asset is configured to provide that the successive instances of the asset inherit the data from the first one, the first instance is represented in classic mode (with all accordion planned), while the latter contains only the accordion of the asset data and a message informing the user of heredity. |
| DDA | Rectangle 3 | * 1**Gross premium** and **installment premium at inception date** * 2**RECALCULATE button**, to update the quotation * 3Button to show **Discounts detail** (if provided) * 4**DETAILS button** dedicated to collecting:   + 5**Fees** perceived by the contract management node   + 6Detail of **contributions** and **taxes** | **Gross premium** and **installment premium at inception date** |
| DDA | **RECALCULATE button**, to update the quotation |
| DDA | Button to show **Discounts detail** (if provided) |
| DDA | **DETAILS button** dedicated to collecting: |
| DDA | **Fees** perceived by the contract management node |
| DDA | Detail of **contributions** and **taxes** |
| fXU | Slide Notes | 1When the asset is configured to provide that the successive instances of the asset inherit the data from the first one, the first instance is represented in classic mode (with all accordion planned), while the latter contains only the accordion of the asset data and a message informing the user of heredity.  2At the bottom of the page there is also another accordion, reserved to:   * 3Quotation parameters; * 4Policy Address; * 5Inserting / editing notes.   6Anchored at the top of the page, always visible, there is a box showing:   * 7Gross premium and installment premium at inception date; * 8RECALCULATE button, to update the quotation; * 9Button to show Discounts detail (if provided); * 10DETAILS button dedicated to collecting:   + 11Fees perceived by the contract management node;   + 12Detail of contributions and taxes | When the asset is configured to provide that the successive instances of the asset inherit the data from the first one, the first instance is represented in classic mode (with all accordion planned), while the latter contains only the accordion of the asset data and a message informing the user of heredity. |
| fXU | At the bottom of the page there is also another accordion, reserved to: |
| fXU | Quotation parameters; |
| fXU | Policy Address; |
| fXU | Inserting / editing notes. |
| fXU | Anchored at the top of the page, always visible, there is a box showing: |
| fXU | Gross premium and installment premium at inception date; |
| fXU | RECALCULATE button, to update the quotation; |
| fXU | Button to show Discounts detail (if provided); |
| fXU | DETAILS button dedicated to collecting: |
| fXU | Fees perceived by the contract management node; |
| fXU | Detail of contributions and taxes |

2.22 Percentage (%) button

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| --- | --- |
| Slide ID 🔒 | fdd6b9ee-db11-4e1d-bec7-9c5d25dfcce5 |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| 1lw | Slide name | Percentage (%) button | Percentage (%) button |
| BBU | Text Box 2 | Percentage (%) Button | Percentage (%) Button |
| tjw | Text Box 3 | * 1discounts may be assigned to the policy's total premium or independently, on each discountable unit, depending on the configuration * 2it may be possible to edit only the discount fields related to the total policy premium or only those concerning the units that may be discounted * 3depending on the flexibility lists identified by the system, the default setting for the fields reserved for entering discounts may be editable or not and may have a given default value | discounts may be assigned to the policy's total premium or independently, on each discountable unit, depending on the configuration |
| tjw | it may be possible to edit only the discount fields related to the total policy premium or only those concerning the units that may be discounted |
| tjw | depending on the flexibility lists identified by the system, the default setting for the fields reserved for entering discounts may be editable or not and may have a given default value |
| ZgI | Slide Notes | 1Let's take a detailed look at the information that the system makes available to the operator by clicking on the % button.  2The page concerning discounts is made up of two separate sections:   * 3the first makes it possible to configure the amounts or percentages of discount with erosion, * 4the second the percentages or amounts of discount without erosion.   5Discounts may be assigned to the policy's total premium or independently, on each discountable unit, depending on the configuration.  6Therefore, according to this configuration, it may be possible to edit only the discount fields related to the total policy premium or only those concerning the units that may be discounted, according to the product configuration.  7The premiums indicated in the section reserved for discounts - to which the discounts will be applied - may be gross, taxable or net premiums.  8Depending on the flexibility lists identified by the system (discount application rules based on the sale point), the default setting for the fields reserved for entering discounts may be editable or not and may have a given default value. | Let's take a detailed look at the information that the system makes available to the operator by clicking on the % button. |
| ZgI | The page concerning discounts is made up of two separate sections: |
| ZgI | the first makes it possible to configure the amounts or percentages of discount with erosion, |
| ZgI | the second the percentages or amounts of discount without erosion. |
| ZgI | Discounts may be assigned to the policy's total premium or independently, on each discountable unit, depending on the configuration. |
| ZgI | Therefore, according to this configuration, it may be possible to edit only the discount fields related to the total policy premium or only those concerning the units that may be discounted, according to the product configuration. |
| ZgI | The premiums indicated in the section reserved for discounts - to which the discounts will be applied - may be gross, taxable or net premiums. |
| ZgI | Depending on the flexibility lists identified by the system (discount application rules based on the sale point), the default setting for the fields reserved for entering discounts may be editable or not and may have a given default value. |

2.23 View button

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| --- | --- |
| Slide ID 🔒 | 11aa169f-1e14-44a0-8768-f7102b182779 |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| A/Y | Slide name | View button | View button |
| nxM | Text Box 2 | View Button | View Button |
| e1Q | Rectangle 8 | **Guarantees Summary:** the system presents the summary list of the selected units and, for each of them, the factors with relative valuation | **Guarantees Summary:** the system presents the summary list of the selected units and, for each of them, the factors with relative valuation |
| B9c | Rectangle 4 | **Premium Detail:** the system presents the composition of the Premium Rate, Annual Premium, and Subscription Instalment Premium, highlighting the net premium, any accessories, and instalment interest, the taxable and total taxes, the gross premium is shown at the top of each column. | **Premium Detail:** the system presents the composition of the Premium Rate, Annual Premium, and Subscription Instalment Premium, highlighting the net premium, any accessories, and instalment interest, the taxable and total taxes, the gross premium is shown at the top of each column. |
| ewE | Slide Notes | 1Let's take a detailed look at the information that the system makes available to the operator by clicking on the View button:   * 2Premium Detail: the system presents the composition of the Premium Rate, Annual Premium, and Subscription Instalment Premium, highlighting the net premium, any accessories, and instalment interest, the taxable and total taxes, the gross premium is shown at the top of each column. * 3Guarantees Summary: the system presents the summary list of the selected units and, for each of them, the factors with relative valuation. | Let's take a detailed look at the information that the system makes available to the operator by clicking on the View button: |
| ewE | Premium Detail: the system presents the composition of the Premium Rate, Annual Premium, and Subscription Instalment Premium, highlighting the net premium, any accessories, and instalment interest, the taxable and total taxes, the gross premium is shown at the top of each column. |
| ewE | Guarantees Summary: the system presents the summary list of the selected units and, for each of them, the factors with relative valuation. |

2.24 Commissions button

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| --- | --- |
| Slide ID 🔒 | 4b08c9e9-6aa4-42e0-9061-e40ebcceca06 |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| gOc | Slide name | Commissions button | Commissions button |
| zn0 | Text Box 2 | Commissions Button | Commissions Button |
| xS0 | Text Box 3 | * 1**Commission derogation:** * 2the user has the option of simultaneously assigning the same commission rates to all Risks * 3**Commission at signature:** * 4the user has the option if enabled via the list of functions, to modify percentages and/or amounts applied by the system, while leaving the policy premium unchanged * 5**Next installment commission:** * 6containing the same detail in the previous sections, but without the possibility of editing the percentages or amounts calculated by the system | **Commission derogation:** |
| xS0 | the user has the option of simultaneously assigning the same commission rates to all Risks |
| xS0 | **Commission at signature:** |
| xS0 | the user has the option if enabled via the list of functions, to modify percentages and/or amounts applied by the system, while leaving the policy premium unchanged |
| xS0 | **Next installment commission:** |
| xS0 | containing the same detail in the previous sections, but without the possibility of editing the percentages or amounts calculated by the system |
| Izs | Slide Notes | 1Let's take a detailed look at the information that the system makes available to the operator by clicking on the Commissions button.  2The system presents the details of the commissions that the sale point will receive (based on the commission price list associated with the point of sale):   * 3Commission derogation, in which the user has the option of simultaneously assigning the same commission rates to all Risks; * 4Commission at signature, containing the detail of the purchase commission collected for each Risk and for the Administration Fees component and in which the user has the option if enabled via the list of functions, to modify percentages and/or amounts applied by the system, while leaving the policy premium unchanged; * 5Next installment commission, visible only in the presence of the next installment, containing the same detail in the previous sections, but without the possibility of editing the percentages or amounts calculated by the system.   6Any changes made by the user require recalculation of the premium and commission. | Let's take a detailed look at the information that the system makes available to the operator by clicking on the Commissions button. |
| Izs | The system presents the details of the commissions that the sale point will receive (based on the commission price list associated with the point of sale): |
| Izs | Commission derogation, in which the user has the option of simultaneously assigning the same commission rates to all Risks; |
| Izs | Commission at signature, containing the detail of the purchase commission collected for each Risk and for the Administration Fees component and in which the user has the option if enabled via the list of functions, to modify percentages and/or amounts applied by the system, while leaving the policy premium unchanged; |
| Izs | Next installment commission, visible only in the presence of the next installment, containing the same detail in the previous sections, but without the possibility of editing the percentages or amounts calculated by the system. |
| Izs | Any changes made by the user require recalculation of the premium and commission. |

2.25 Contributions and Taxes button

|  |  |
| --- | --- |
| Slide ID 🔒 | a9add382-97f3-4ff3-bb8c-e68f97e6299a |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| AcA | Slide name | Contributions and Taxes button | Contributions and Taxes button |
| YLk | Text Box 2 | Commissions Button | Commissions Button |
| 3Uc | Text Box 3 | * 1the system shows the details of taxes for each cover, taking into account the **premium at the** **Inception Date**, the **next installments premium**, and the **annual premium** * 2if rights are envisaged, commissions on rights are also presented | the system shows the details of taxes for each cover, taking into account the **premium at the** **Inception Date**, the **next installments premium**, and the **annual premium** |
| 3Uc | if rights are envisaged, commissions on rights are also presented |
| p9k | Slide Notes | 1Let's take a detailed look at the information that the system makes available to the operator by clicking on the Contributions and Taxes button.  2The system shows the details of taxes for each cover, taking into account the premium at the Inception Date, the next installments premium, and the annual premium.  3If rights are envisaged, commissions on rights are also presented. | Let's take a detailed look at the information that the system makes available to the operator by clicking on the Contributions and Taxes button. |
| p9k | The system shows the details of taxes for each cover, taking into account the premium at the Inception Date, the next installments premium, and the annual premium. |
| p9k | If rights are envisaged, commissions on rights are also presented. |

2.26 Damages Proposal Summary

|  |  |
| --- | --- |
| Slide ID 🔒 | 8fb50031-0637-401f-91c1-f1c855ca805d |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| JpE | Slide name | Damages Proposal Summary | Damages Proposal Summary |
| jGU | Text Box 2 | Damages Proposal Summary | Damages Proposal Summary |
| FQY | Text Box 3 | 1In the  2Damages Proposal Summary  3we can see some  4summary data  5of the proposal we are issuing | In the |
| FQY | Damages Proposal Summary |
| FQY | we can see some |
| FQY | summary data |
| FQY | of the proposal we are issuing |
| d4Y | Slide Notes | 1In the Damages Proposal Summary we can see some summary data of the proposal we are issuing.  2The page has two main accordions:   * 3Summary of the contract details, always present, containing more accordion with the policy data and the insured asset, with premiums details * 4Entering constraints, present only if the proposal admits constraints.   5We can save the proposal, or go back, or buy it. We click on <BUY>. | In the Damages Proposal Summary we can see some summary data of the proposal we are issuing. |
| d4Y | The page has two main accordions: |
| d4Y | Summary of the contract details, always present, containing more accordion with the policy data and the insured asset, with premiums details |
| d4Y | Entering constraints, present only if the proposal admits constraints. |
| d4Y | We can save the proposal, or go back, or buy it. We click on <BUY>. |

2.27 Mandatory data page

|  |  |
| --- | --- |
| Slide ID 🔒 | 1c760202-e5ec-433e-a55a-acd29343aaf8 |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| V5E | Slide name | Mandatory data page | Mandatory data page |
| ZCc | Text Box 2 | Mandatory Data Page | Mandatory Data Page |
| ZsA | Text Box 3 | 1Before proceeding with the issuance of the contract, the flow takes us to the  2mandatory data page | Before proceeding with the issuance of the contract, the flow takes us to the |
| ZsA | mandatory data page |
| zI0 | Slide Notes | 1Before proceeding with the issuance of the contract, the flow takes us to the mandatory data page, which is divided into the following sections:   * 2Policy mandatory data, editable based on configuration * 3Payment data, visible only if the product allows the possibility of payment via DDO (SSD) * 4Policy contact details, always visible   5To purchase the policy, click on the CONFIRM button. | Before proceeding with the issuance of the contract, the flow takes us to the mandatory data page, which is divided into the following sections: |
| zI0 | Policy mandatory data, editable based on configuration |
| zI0 | Payment data, visible only if the product allows the possibility of payment via DDO (SSD) |
| zI0 | Policy contact details, always visible |
| zI0 | To purchase the policy, click on the CONFIRM button. |

2.28 Purchase completion

|  |  |
| --- | --- |
| Slide ID 🔒 | 35b351ac-5313-46da-b438-93f807f51286 |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| xAw | Slide name | Purchase completion | Purchase completion |
| Ngk | Text Box 2 | Purchase Completion | Purchase Completion |
| K9Q | Slide Notes | 1The purchase is now completed: the system shows the policy number created.  2Now, using the Technical Accounting Transactions subcard, we can collect the premium, by clicking on <Collect>. | The purchase is now completed: the system shows the policy number created. |
| K9Q | Now, using the Technical Accounting Transactions subcard, we can collect the premium, by clicking on <Collect>. |

2.29 Cash Collection

|  |  |
| --- | --- |
| Slide ID 🔒 | efa923b8-de5b-42a1-80ff-62fd1c596d65 |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| hZ4 | Slide name | Cash Collection | Cash Collection |
| JdU | Text Box 2 | Cash Collection | Cash Collection |
| vao | Slide Notes | 1In the Cash Collection section we have to choose the Payment Type and the Allocations and then we click on <COLLECT>.  2The system shows the message «Payment is ended correctly», so we have created the new policy and collected it. | In the Cash Collection section we have to choose the Payment Type and the Allocations and then we click on <COLLECT>. |
| vao | The system shows the message «Payment is ended correctly», so we have created the new policy and collected it. |

2.30 Summary

|  |  |
| --- | --- |
| Slide ID 🔒 | 87d66590-4d06-4a84-bea5-75389ca73a8b |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| ncI | Slide name | Summary | Summary |
| l6s | Text Box 1 | Summary | Summary |
| j0E | Text Box 2 | Now you are able to understand: | Now you are able to understand: |
| 9WQ | Text Box 3 | * 1how to enter the * 2necessary data * 3to issue a * 4new NO MOTOR quote * 5on the Global Building Payer product * 6how to enter the * 7necessary data * 8to issue a * 9new NO MOTOR policy * 10 on a Global Building Payer product | how to enter the |
| 9WQ | necessary data |
| 9WQ | to issue a |
| 9WQ | new NO MOTOR quote |
| 9WQ | on the Global Building Payer product |
| 9WQ | how to enter the |
| 9WQ | necessary data |
| 9WQ | to issue a |
| 9WQ | new NO MOTOR policy |
| 9WQ | on a Global Building Payer product |
| oU8 | Slide Notes | 1Now you are able to understand:   * 2how to enter the necessary data to issue a new NO MOTOR quote on the Global Building Payer product * 3how to enter the necessary data to issue a new NO MOTOR policy on a Global Building Payer product | Now you are able to understand: |
| oU8 | how to enter the necessary data to issue a new NO MOTOR quote on the Global Building Payer product |
| oU8 | how to enter the necessary data to issue a new NO MOTOR policy on a Global Building Payer product |

2.31 Exit Module

|  |  |
| --- | --- |
| Slide ID 🔒 | 918f6a3b-d0d8-4ecf-a894-a871b76ae8ee |
| Preview Image |  |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| 9u4 | Slide name | Exit Module | Exit Module |
| TwY | Text Box 1 | **Congratulations!** | **Congratulations!** |
| tTg | Text Box 2 | You have completed the module. Now you can close this window. | You have completed the module. Now you can close this window. |
| uHA | Text Box 3 | **MODULE 1** | **MODULE 1** |
| DrY | Rectangle 2 - Normal state | EXIT | EXIT |
| ang | Slide Notes | Congratulations! You have completed the module. | Congratulations! You have completed the module. |

Player Properties

|  |  |
| --- | --- |
| Player data ID 🔒 | 33d1fe27-9afa-4c59-a10c-e66eead69f2a |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| /VI | Project title | P&C NO MOTOR - Module 1 - Quote & Policy Issues | P&C NO MOTOR - Module 1 - Quote & Policy Issues |

Menu

|  |  |
| --- | --- |
| Table of Contents ID 🔒 | 42c2b730-864d-491a-b111-3fc5c460444c |

| ID 🔒 | Type | Source Text | Translation |
| --- | --- | --- | --- |
| OCs | Menu Item | 1 P&C NO MOTOR | 1 P&C NO MOTOR |
| YVE | Menu Item | 1.1 Welcome | 1.1 Welcome |
| IpE | Menu Item | 1.2 Learning Objectives | 1.2 Learning Objectives |
| PKA | Menu Item | 2 P&C NO MOTOR Quote & Policy Issues | 2 P&C NO MOTOR Quote & Policy Issues |
| O5o | Menu Item | 2.1 Welcome | 2.1 Welcome |
| qLg | Menu Item | 2.2 Learning Objectives | 2.2 Learning Objectives |
| DyM | Menu Item | 2.3 New P&C Quote | 2.3 New P&C Quote |
| 1Bk | Menu Item | 2.4 New NO MOTOR quote issue | 2.4 New NO MOTOR quote issue |
| fOE | Menu Item | 2.5 Assets page | 2.5 Assets page |
| NMI | Menu Item | 2.6 Quotation page (1/5) | 2.6 Quotation page (1/5) |
| ofU | Menu Item | 2.7 Quotation page (2/5) | 2.7 Quotation page (2/5) |
| RMs | Menu Item | 2.8 Quotation page (3/5) | 2.8 Quotation page (3/5) |
| 04U | Menu Item | 2.9 Quotation page (4/5) | 2.9 Quotation page (4/5) |
| iFY | Menu Item | 2.10 Quotation page (5/5) | 2.10 Quotation page (5/5) |
| Lbs | Menu Item | 2.11 Applicant Personal Data | 2.11 Applicant Personal Data |
| gfQ | Menu Item | 2.12 New P&C Policy | 2.12 New P&C Policy |
| gjk | Menu Item | 2.13 New NO MOTOR proposal (1/4) | 2.13 New NO MOTOR proposal (1/4) |
| 1PI | Menu Item | 2.14 New NO MOTOR proposal (2/4) | 2.14 New NO MOTOR proposal (2/4) |
| ruI | Menu Item | 2.15 New NO MOTOR proposal (3/4) | 2.15 New NO MOTOR proposal (3/4) |
| 1SY | Menu Item | 2.16 New NO MOTOR proposal (4/4) | 2.16 New NO MOTOR proposal (4/4) |
| ne4 | Menu Item | 2.17 Asset selection popup | 2.17 Asset selection popup |
| HnA | Menu Item | 2.18 Assets Data page | 2.18 Assets Data page |
| utk | Menu Item | 2.19 Quotation page (1/3) | 2.19 Quotation page (1/3) |
| GTI | Menu Item | 2.20 Quotation page (2/3) | 2.20 Quotation page (2/3) |
| s6Y | Menu Item | 2.21 Quotation page (3/3) | 2.21 Quotation page (3/3) |
| yFw | Menu Item | 2.22 Percentage (%) button | 2.22 Percentage (%) button |
| 1nI | Menu Item | 2.23 View button | 2.23 View button |
| D3Y | Menu Item | 2.24 Commissions button | 2.24 Commissions button |
| dBI | Menu Item | 2.25 Contributions and Taxes button | 2.25 Contributions and Taxes button |
| K4Y | Menu Item | 2.26 Damages Proposal Summary | 2.26 Damages Proposal Summary |
| fZQ | Menu Item | 2.27 Mandatory data page | 2.27 Mandatory data page |
| jVU | Menu Item | 2.28 Purchase completion | 2.28 Purchase completion |
| eRo | Menu Item | 2.29 Cash Collection | 2.29 Cash Collection |
| 1O0 | Menu Item | 2.30 Summary | 2.30 Summary |
| Sts | Menu Item | 2.31 Exit Module | 2.31 Exit Module |