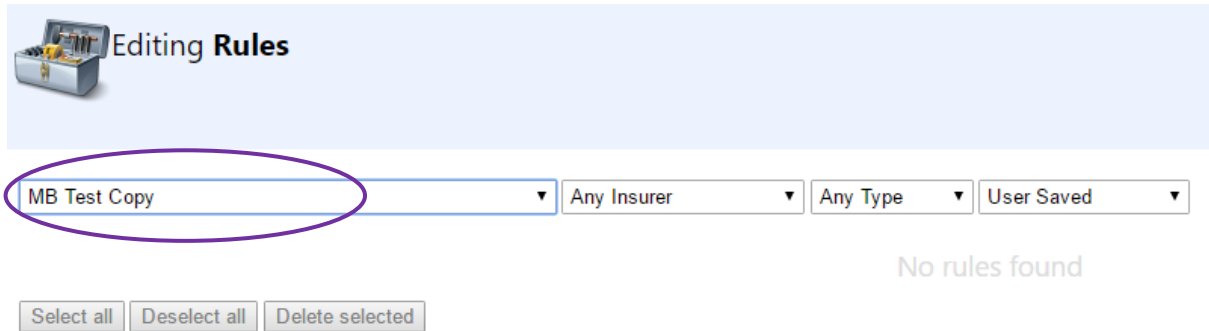


## Rules – creating a rule to refer at a specific sum insured

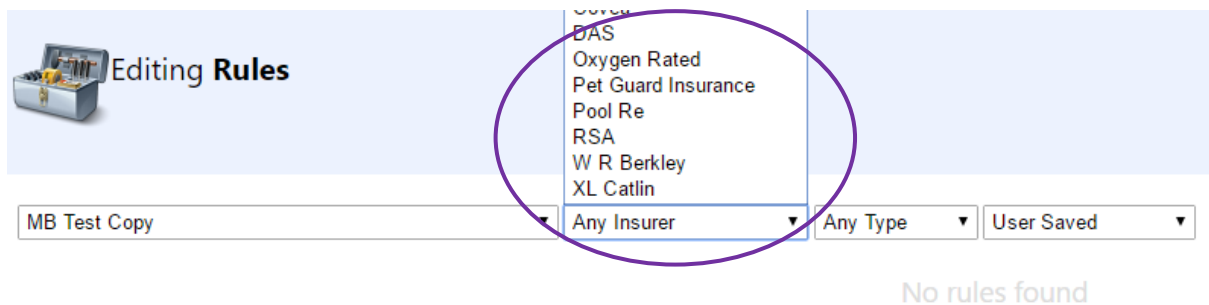
Select Admin > Rule Builder

In the first dropdown box, select the scheme that the rule is to apply to:



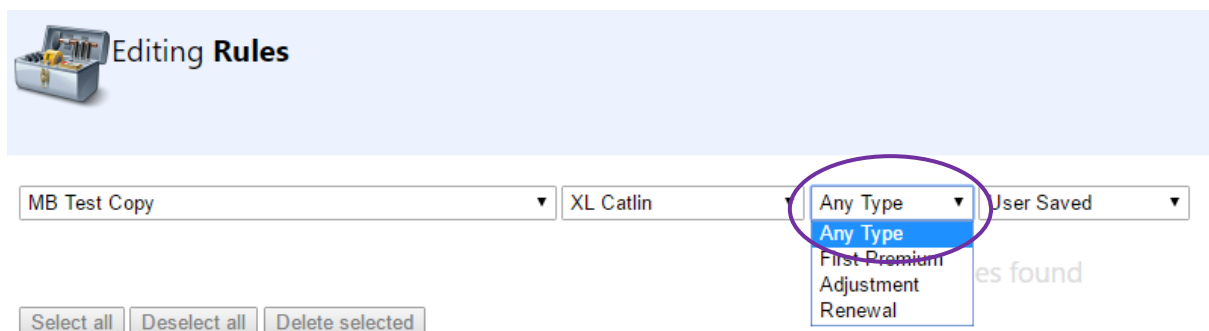
The screenshot shows the 'Editing Rules' interface. At the top left is a toolbox icon and the text 'Editing Rules'. Below this is a row of four dropdown menus. The first dropdown menu is open, showing 'MB Test Copy' selected and circled in purple. The other three dropdown menus are closed and show 'Any Insurer', 'Any Type', and 'User Saved'. Below the dropdowns is the text 'No rules found' and three buttons: 'Select all', 'Deselect all', and 'Delete selected'.

Use the next dropdown box to select the insurer that the rule will relate to:



The screenshot shows the 'Editing Rules' interface. The first dropdown menu is closed and shows 'MB Test Copy'. The second dropdown menu is open, showing a list of insurers: 'DAS', 'Oxygen Rated', 'Pet Guard Insurance', 'Pool Re', 'RSA', 'W R Berkley', and 'XL Catlin'. The 'Any Insurer' option is selected and circled in purple. The other three dropdown menus are closed and show 'Any Type', 'User Saved', and 'User Saved'. Below the dropdowns is the text 'No rules found'.

In the next dropdown box, select the 'Any Type' option. This will refer the case at first premium, adjustment or renewal and means that there is no need to repeat entry of this referral three times:

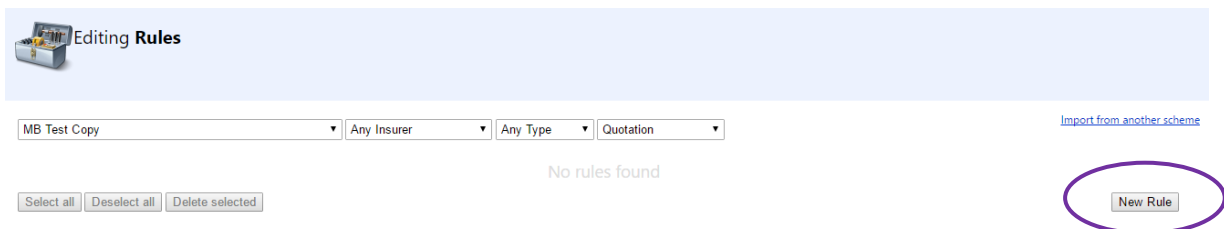


The screenshot shows the 'Editing Rules' interface. The first dropdown menu is closed and shows 'MB Test Copy'. The second dropdown menu is closed and shows 'XL Catlin'. The third dropdown menu is open, showing a list of options: 'Any Type', 'Any Type', 'First Premium', 'Adjustment', and 'Renewal'. The 'Any Type' option is selected and circled in purple. The fourth dropdown menu is closed and shows 'User Saved'. Below the dropdowns is the text 'No rules found' and three buttons: 'Select all', 'Deselect all', and 'Delete selected'.

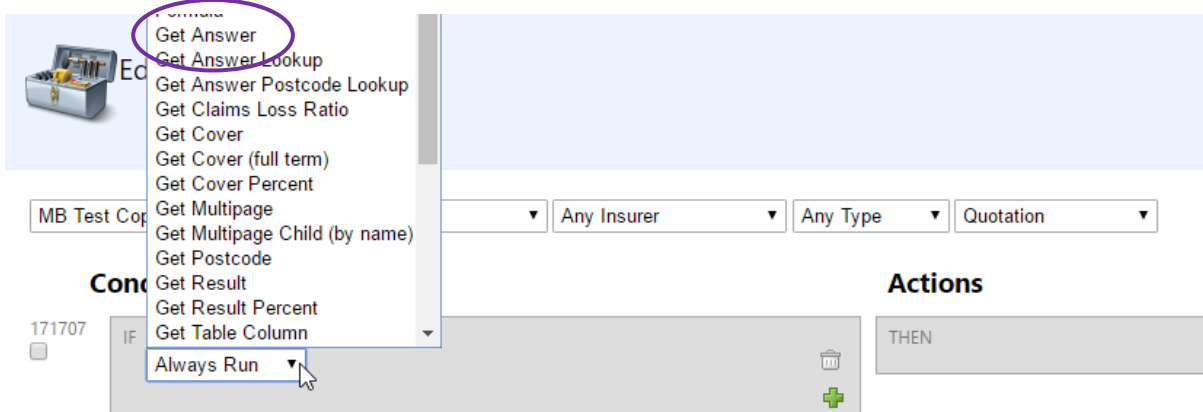
Finally, select 'Quotation' – this means the rule will run at the quote stage and refer the case



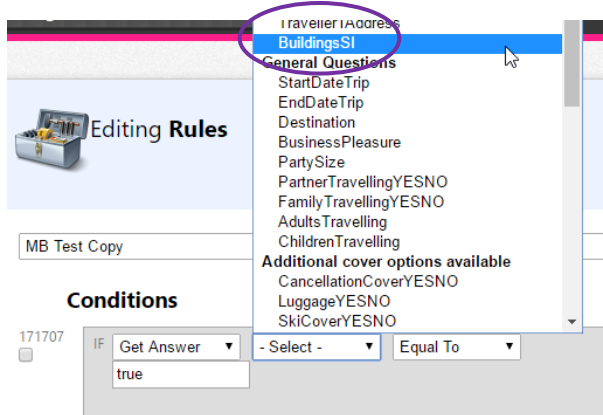
Select the 'New Rule' option to the bottom right of the screen.



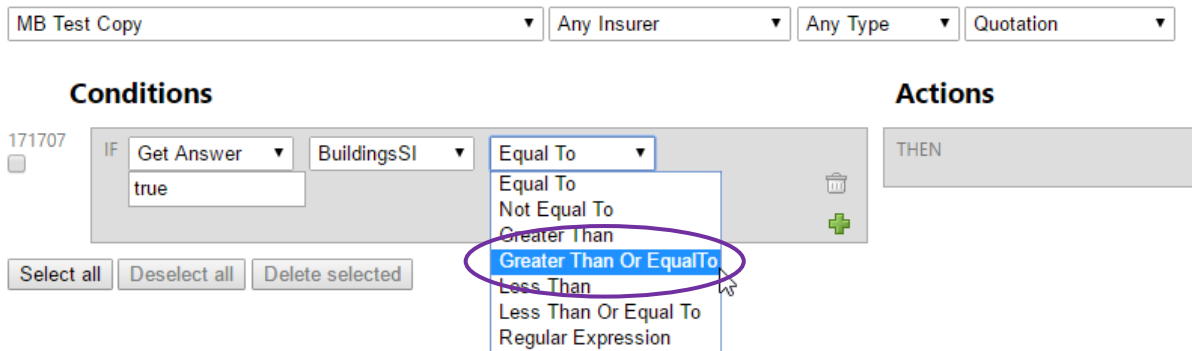
In the 'Conditions' section, use the dropdown menu to select the 'Get Answer' option – this is the most appropriate field where a rule needs to run on numeric field.



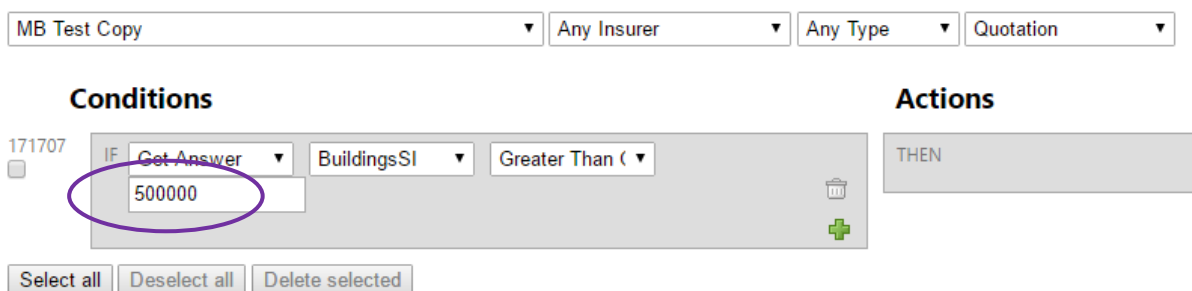
Use the dropdown in the next box to identify the question that the rule needs to run on:



Use the next dropdown to select 'Greater than or equal to':



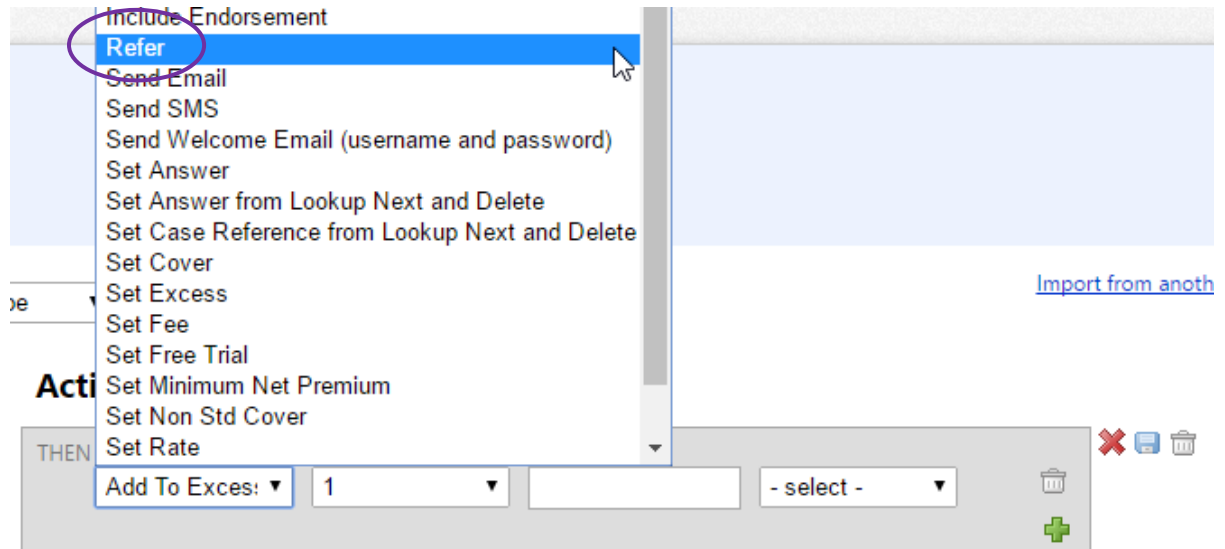
Finally, in the last box enter the amount at which the rule should refer:



In the 'Actions' section, select the green plus symbol:



In the first box, select the 'Refer' option:



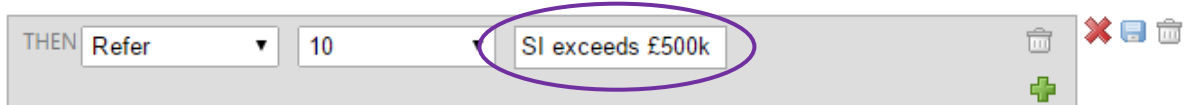
The second box is the authority level that is needed for a user to clear the referral – select the most appropriate option:

### Actions



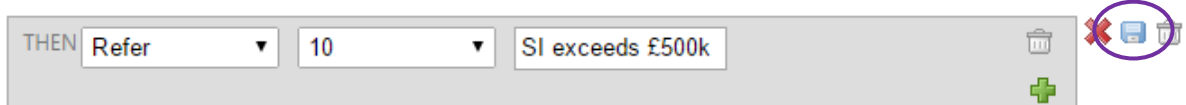
The final box is to enter the descriptive text that displays when a case is referred:

### Actions





Save the rule by clicking on the save icon – the entire section will shade out in grey:

### Actions





MB Test Copy    XL Catlin    Any Type    Quotation    [Import from anot](#)

Conditions		Actions	
171708	IF Get Answer BuildingsSI Greater Than Or EqualTo 500000	THEN Refer 10 SI exceeds £500k	 

Finally, enable the rule by selecting the red X icon – the grey shading will be removed, the red X icon will be replaced by a green tick, and the rule will be effective:

MB Test Copy    XL Catlin    Any Type    Quotation    [Import from anot](#)

Conditions		Actions	
171708	IF Get Answer BuildingsSI Greater Than Or EqualTo 500000	THEN Refer 10 SI exceeds £500k	 

MB Test Copy    XL Catlin    Any Type    Quotation    [Import from anot](#)

Conditions		Actions	
171708	IF Get Answer BuildingsSI Greater Than Or EqualTo 500000	THEN Refer 10 SI exceeds £500k	