

User Guide:

How to process a Cancellation.

1

Once you've logged in, locate the policy you want to Cancel by browsing the tabs on the Dashboard or utilising the Search tool by entering the policy number, insured name, or vehicle registration.

Locate via Dashboard.

Recent quote or policy

Retrieve existing quotes

Recently Accessed

Incomplete Transactions

Renewals

Policy Number	Quote Reference	Product	Term Start	Term End
MOVPOL11000165	MOVQTE10001206	Motor Vehicle	15/01/2024	15/01/2025
MOVPOL11000165	MOVQTE10001015	Motor Vehicle	12/01/2024	12/01/2025
MOVPOL11000002	MOVQTE10000057	Motor Vehicle	4/01/2024	4/01/2025
MOBPOL11000050	MOBQTE10000197	Motorcycle	15/01/2024	15/01/2025
MOBPOL11000048	MOBQTE10000172	Motorcycle	12/01/2023	12/01/2024

Double-click to view policy

2 Locate via Search tool.

3 After confirming it is the correct policy, simply scroll down and click "Cancel Policy" to proceed.

4

Navigate to the Policy & Insured Details screen to enter the date your Cancellation is effective from together with the Cancellation Reason from the drop-down menu.

000163 | MOVQ1E10001214 | incomplete | Cancellation | Draft | 15/01/2024 | 15/01/2024

Policy Details

Effective: 30/01/2024 | Cancellation Reason: Vehicle(s) Sold

Account: Zetland (ZU0001) | Product Variant: Comprehensive

Intermediary

Broker Name: Broker2 Broker | Broker Email: noreply@broker.com | Broker Phone: 021234567

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Then simply click "Premium" on the navigation menu.

Drivers: Steve Macri, Sally Macri

Vehicles: 2023 ALFA ROMEO ...

Premium

Communications: Comments, Attachments, Policy Documents, Documents, Clauses

Intermediary

Broker Name: Broker2 Broker

Are you the holding broker? No

Client Details

Link Party | Edit

6

To ensure all system processes have been carried out, click on Calculate Terms. This will calculate your Return Premium (if applicable) and also make the Bind & Close button available.

The screenshot shows a dropdown menu titled 'Communications' with the following options: Comments, Attachments, Policy Documents, Documents, Clauses, and Policy History. Below the dropdown are four buttons: 'Calculate Terms' (highlighted with an orange circle), 'Abandon Quote', 'Duplicate', and 'Quit'.

7

As we Cancelled this policy you can see the Return Premium applicable for the transaction including all charges based on the Effective Date you entered.

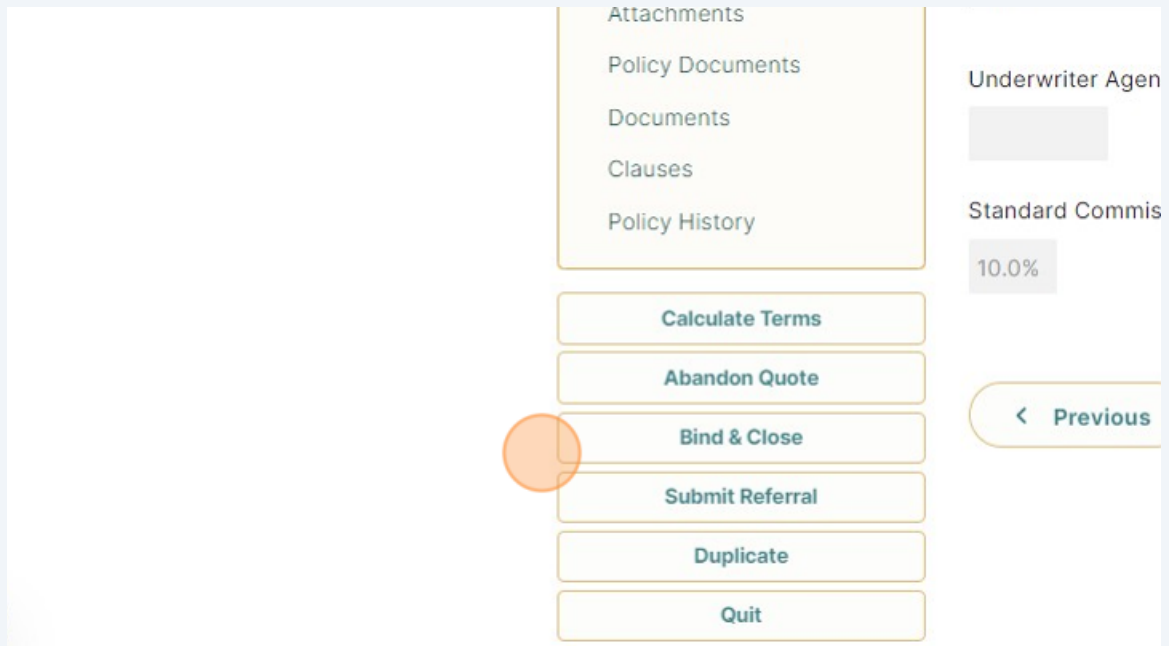
The screenshot shows the 'Premium' section of the policy details page. The left sidebar has tabs for Client Details, Insured Details, Drivers, Vehicles, Premium (selected), and Communications. The main content area shows a table of charges with the following data:

		⊕ Expand All ⊖ Collapse All				
Description		Base Premium	ESL	GST	Stamp Duty	Total Premium
Policy Premium Summary	^	-\$2,042.25	\$0.00	-\$204.22	-\$224.65	-\$2,471.12
Vehicle Summary	⌵	-\$2,042.25	\$0.00	-\$204.22	-\$224.65	-\$2,471.12
Agency Fee		\$0.00		\$0.00		\$0.00

Below the table is a section for 'Underwriter Agency Fee Override' with a text input field.

8

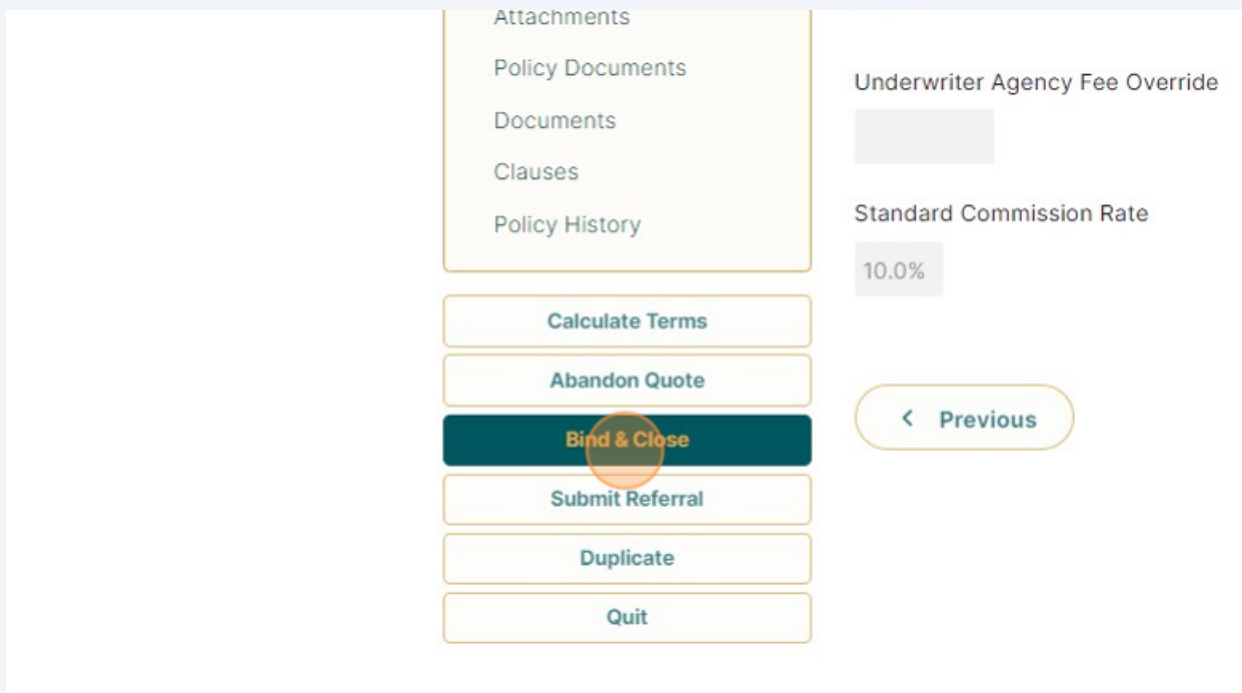
You can still Submit Referrals to underwriters, if need be, prior to binding (remember to add a comment to assist them).



The screenshot shows a sidebar menu on the left with the following items: Attachments, Policy Documents, Documents, Clauses, and Policy History. The main content area contains a vertical stack of buttons: Calculate Terms, Abandon Quote, Bind & Close (highlighted with an orange circle), Submit Referral, Duplicate, and Quit. To the right of the buttons, there are two input fields: 'Underwriter Agen' and 'Standard Commis' with a value of 10.0%. A 'Previous' button is located to the right of the 'Bind & Close' button.

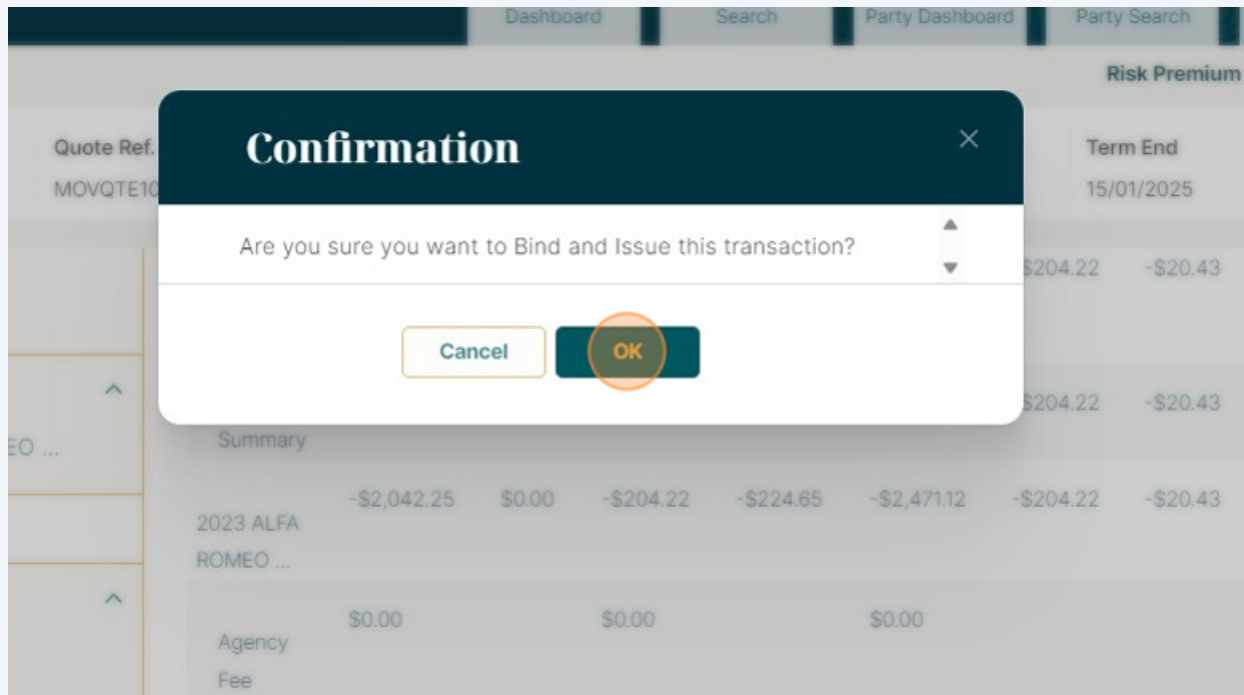
9

Once ready, simply click "Bind & Close".

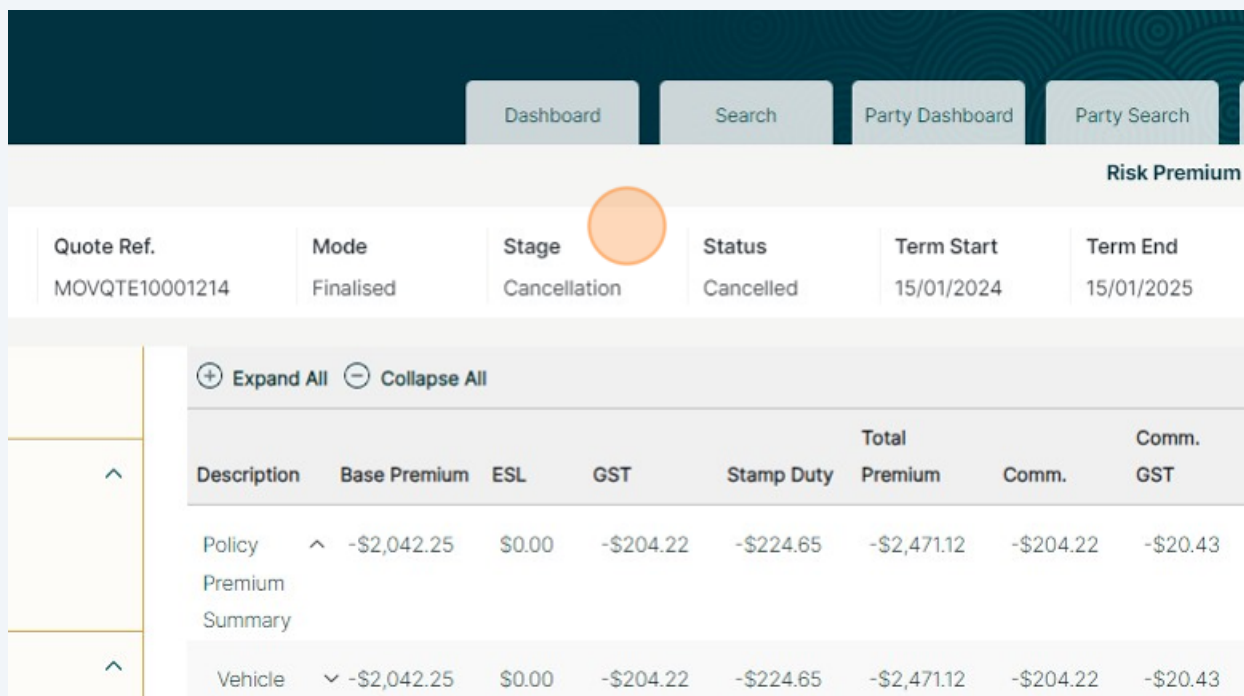


The screenshot shows the same interface as the previous one, but with the 'Bind & Close' button highlighted in dark blue and an orange circle around it. The sidebar menu and the main content area buttons are the same. The input fields on the right are 'Underwriter Agency Fee Override' and 'Standard Commission Rate' with a value of 10.0%. A 'Previous' button is located to the right of the 'Bind & Close' button.

10 Click "OK"



11 You'll also notice the menu bar across the top reflects the policy status as Cancelled.



12 To view & download the Cancellation Schedule, click "Documents"

13 Click on the "Motor Vehicle Cancellation Schedule" (NB: They will be in chronological order).

Description	File Name
Motor Vehicle Cancellation Schedule	Motor Vehicle Cancellation Schedule (MOVPOL11000165).pdf
Motor Vehicle Extract	Motor Vehicle Extract (MOVPOL11000165).xml
Motor Vehicle New Business Schedule	Motor Vehicle New Business Schedule (MOVPOL11000165).pdf
Motor Vehicle Extract	Motor Vehicle Extract (MOVPOL11000165).xml

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On the same screen is the "Policy History" which will show you all transactions carried out against this policy since the original New Business inception. You can view any of these, at any time, simply by double clicking on a row.

Attached To	Title
Policy	Overnight parking
Policy	Prescribed Age 30 Clause

Policy History



Quote Reference	Stage	Status	Term	Effective Date	Modi
MOVQTE10001214	Cancellation	Cancelled	1	30/01/2024	15/0
MOVQTE10001213	Reinstatement	Closed	1	30/01/2024	15/0
MOVQTE10001211	Cancellation	Cancelled	1	30/01/2024	15/0