

# Broker User Guide

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## New Business

## Simplafy Connect - Broker User Guide

### Logging in

Enter your username and password.

Your username will be the e-mail associated with the account.

DAWES MANSIONS

Need help? Call Dawes 1300 188 299 | Mansions 1300 738

**Simplafy**  
CONNECT

Simplafy Connect is a secure platform trusted by [Dawes Motor Insurance](#) and [Mansions of Australia](#) to assist brokers and underwriters in simplifying the insurance broking process.

To register for access please [Click Here](#)

**Portal Secure Login**

Please enter your username and password. Your username is normally your email address.

Username

Password

[Forgotten Password](#)

Login

If you do not have an account, please navigate to “Register for access please [Click Here](#)”

Need help?

**Simplafy**  
CONNECT

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To register for access please [Click Here](#)

**Portal Secure Login**

## Simplafy Connect Portal Layout

The Information Bar in the **light Blue Box** of the screenshot highlights relevant information such as policy number, quote reference, transaction stage, status and policy periods.

The Action Bar in the **light Green Box** of the screenshot contains relevant **actions** to certain functions like Saving your progress or Calculating Terms.

The Navigation Bar in the **light Red Box** of the screenshot is used to navigate between different section of the quotation.

Mansions

Policy Details

Policy No.	Quote Ref.	Mode	Stage	Status	Term Start	Term End	Effective
M0012335	MANQTE00102474	Incomplete	New Business	Draft	27/02/2025	27/02/2026	27/02/2025

Save Progress

Calculate Terms

Copy & Amend Quote

Lapse Quote

Abandon Quote

Disclosure Details

Policy Details

Insured Details

Insurance History

Property Address(es)

Premium

Communications

Comments

Attachments

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Policy History

### Disclosure Details

Your Duty Not To Make A Misrepresentation

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About Mansions

The contract of insurance is arranged by SGUAS Pty Ltd t/as Mansions (ABN 15 096 726 895, AFSL 234437) ('Mansions') acting under under binding authority as agent for the insurer of the product, QBE Insurance (Australia) Ltd (ABN 78 003 191 035, AFSL 239545) ('QBE').

Your duty when you apply for insurance

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By law, you must take reasonable care not to make a misrepresentation. This means giving us true, complete and accurate answers to our questions, including where you provide information on someone else's behalf. We use your answers to decide whether to insure you and on what terms.

If any of your answers are misleading, incomplete, inaccurate or fraudulent we may reduce or not pay a claim, cancel your policy or treat it as if it never existed.

Please contact your insurance broker if any of the following apply:

Create a new quote with Mansions.

1. To create a new quote, click on the Mansions hyperlink.

DAWES MANSIONS

POWERED BY  
Simplafy  
CONNECT


**Dashboard** Create, view, manage and transact quote or policy

**Create a new quote**

Click the product you require from the links below to create a new quote.


**Mansions**

*Mansions Executive Insurance*




**Motor Vehicle**

*Note: Dawes Comprehensive Motor product caters for prestige, high performance, exotic, classic, and vintage and veteran vehicles.*



**Motorcycle**

*Note: Dawes does not insure unregistered Dirt Bikes or any cover whilst used off-road.*



- Once you have read through and understood the Duty of Disclosure, scroll down and tick the checkbox and click **Next** to proceed with adding policy details.

• you're unsure of the accuracy of your answer.

Privacy Notice

You can view QBE's Privacy Policy at <https://www.qbe.com/au/about/governance/privacy-policy> or contact QBE at [customer care@qbe.com](mailto:customer care@qbe.com) or on 1300 650 503 for a copy.

You can view Mansions' Privacy Policy at [www.mansions.com.au](http://www.mansions.com.au) or contact Mansions' Privacy Officer at [privacyofficer@steadfastagencies.com.au](mailto:privacyofficer@steadfastagencies.com.au) or +61 2 9307 6656.

☒ I have read and understood the Duty of Disclosure

Next →

- Enter the required Term start and end dates. (Note these will default to today's date).  
The **Account** and **Intermediary Details**, reflect your Brokerage and contact details.
- Click **Next** to proceed to the **Insured Details** section.

Disclosure Details

**Policy Details**

Insured Details

Insurance History

Property Address(es)

Premium

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Policy History

**Policy Details**

Term start

Term end

Account

**Intermediary**

Broker name

Broker email

Broker phone

< Previous

30/03/2025

30/03/2026

Next →

- Fill in the relevant Insured details.

*Please ensure full names are entered as we will not accept initials.*

## Primary Insured Details

Name type

First name

Last name

DOB

Occupation

Nature of occupation

Domiciled in Australia<sup>①</sup>

Client email address<sup>①</sup>



- Click **Add Insured** to include additional Insureds. This will open a floating window where you can enter additional client details.

## Additional Insured Details

Name	Name type	DOB
No data available.		

[< Previous](#)

[Next >](#)

- Click **Ok** then **Next** to proceed to the next section that captures their Insurance History.

## Insurance History

Is this a current client of yours?

Length of your relationship with client

Current insurer

Invited renewal total premium from current insurer (inclusive of all government charges)

What excess is applicable to the insured/s current household insurance policy?

8. If the Insured has any claims that require to be disclosed, select **Yes** and click **Add Loss** to note claim details.

- incurred any loss or damage to their home/s, contents or valuables (whether insured or not), or  
 - had any personal/legal liability claims made against you in the last 5 years?

## Claims

If multiple claims need to be disclosed, please select **Add Loss** again to enter additional claim details.

## Claims

Date of loss	Claim number	Type of loss
dd / mm / yyyy		
Loss description		
Loss location		

Loss amount?	Claim status
000,000,000	

[Remove](#)

- Once the Claims Information and Duty of Disclosure questions have been answered, click **Next** to add risk details.

Has the insured/s, including family and relatives residing with the insured/s:

- Been declared bankrupt in the last 5 years?

- Had insurance refused, cancelled or had special terms or conditions imposed on an insurance policy?<sup>(1)</sup>

- Been charged or convicted of a criminal offence in the last 5 years (other than traffic offences or criminal offences that occurred under the age of 16)?

Is the insured/s, or any family or residences residing with the insured/s a politically exposed person (PEP)?<sup>(1)</sup>

Yes	No
Yes	No
Yes	No
Yes	No

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Next >

- To add property address, click **+Add Location** button.
- A small search window will appear which will allow you to type an address. As you type the address, a list of addresses will populate automatically.
- Select the risk address from this list and click **OK**.

Disclosure Details
Policy Details
Insured Details
Insurance History
<b>Property Address(es)</b>
Premium
Communications
Comments

### Property Address(es)

#	Address	Coverage type(s)	Total sum insured
---	---------	------------------	-------------------

+ Add Location

< Previous

Location Address

Property Address

Address

150 Lonsdale street

150 Lonsdale Street, Hamilton VIC 3300

150 Lonsdale Street, Melbourne VIC 3000

Cancel

OK

13. Once the address has been selected, go to the **Navigation Bar** and select **Location Details** to choose the covers required.

**Disclosure Details**

**Policy Details**

**Insured Details**

**Insurance History**

**Property Address(es)**

150 Lonsdale Street Melbourne VIC 3000 ^

**Location Details**

**Premium**

**Communications** ^

## Property Address(es)

#	Address
1	150 Lonsdale Street Melbourne VIC 3000

+ Add Location

< Previous

14. On the **Location Details** page, tick the checkboxes for the relevant covers.

Disclosure Details

Policy Details

Insured Details

Insurance History

Property Address(es)

150 Lonsdale Street Melbourne VIC 3000 ^

Location Details

Premium

Communications ^

Comments

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Policy History

Situation Summary / Location Details

## Property Address

Address

150 Lonsdale Street, Melbourne VIC 3000

☐ Can't find address

### Coverage Details

All policies must include one primary residence.

Liability only (for vacant blocks of land) can only be selected when the policy is also covering a primary residence for the insured/s.

☐ Home

☐ Contents

☐ Private Collections

☐ Liability only (for vacant blocks of land)

\*Family CyberSecure and Legal Liability are included in all policies.

15. Click to expand or reveal the rest of the questionnaire and provide answers accordingly.

Interested Party Details	▼
Property Type and Occupancy Details (none selected)	▼
Property Built, Activity, & Condition Details	▼
Physical Security and Fire Protection	▼
Additional Information - Rural/Remote Properties	▼
Requirement Details	▼

16. To add an **Interested Party**, please select which cover this applies to and select the **Interested Party** from the lists.

If the **Interested Party** is not on the list, please select **Other** and type the details in.

**Interested Party Details**

Is there any interested parties to be noted at this address?

**Interested Party Details**

Yes - Building only  
 Yes - Contents/Private Collections only  
 Yes - Liability only  
 No  
 Other

Remove

Adelaide Bank Limited  
 Australia & New Zealand Banking Group  
 Bank of Queensland  
 Bank of South Australia Limited  
 Bankwest  
 Bendigo Bank  
 Challenge Bank Limited  
 Citibank Limited  
 Colonial State Bank  
 Commonwealth Bank of Australia  
 Deutsche Bank  
 HSBC  
 ING Direct  
 National Australia Bank  
 Transport for NSW  
 St George Bank  
 Suncorp Metway  
 Westpac Banking Corporation  
 Other

Previous

17. Once all the questions regarding the risk have been answered, go to the Navigation Bar and click on **Home** to enter the **Building Sum Insured** and select the **Excess**.

Disclosure Details

Policy Details

Insured Details

Insurance History

Property Address(es)

150 Lonsdale Street  
Melbourne VIC 3000

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Situation Summary / Location Details

Property Address

Address

150 Lonsdale Street, Melbourne VIC 3000

Can't find address

Coverage Details

☒ Home  
☒ Contents  
☒ Private Collections  
☐ Liability only (for vacant blocks of land)

Liability only (for vacant blocks of land) can only be selected when the policy is also covering a primary residence for the insured/s.

\*Family CyberSecure and Legal Liability are included in all policies.

Insured Details

Insurance History

Property Address(es)

150 Lonsdale Street  
Melbourne VIC 3000

Location Details

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Home

Home sum insured including other structures

Note: The sum insured must be kept at a level which represents the full replacement cost of the home. Full replacement cost should include GST and professional fees.

Note: Tenanted Properties  
If the insured/s regularly leases out the property on an unfurnished basis, please include the replacement value of carpets, curtains and internal blinds in the home sum insured.

Does home sum insured safeguard apply?

Excess

Imposed excess

< Previous

AUD \$ 000,000,000

\$1,000

\$2,500

\$5,000

\$10,000

\$25,000

\$50,000

12

18. Click on **Contents** to enter the **Contents** sum insured and select the **Excess**.

**Contents**

Contents sum insured AUD \$ 000,000,000

Note: The sum insured must be kept at a level which represents the replacement cost as new.

Additions & alterations sum insured AUD \$ 000,000,000

Note: Additions and alterations (strata properties only)  
Please provide the total replacement value of internal paint work, wallpaper and any fixture or structural improvement pertaining to the unit which the Body Corporate is not required by law to insure.

Does contents sum insured safeguard apply?

Excess \$1,000  
\$2,500  
\$5,000  
\$10,000  
\$25,000  
\$50,000

Imposed excess

[< Previous](#)

19. Click on **Private Collection** and tick the checkbox for the required private collections cover.

To note Specified Items (*Jewellery, Fine Art, Silverware, Wine, Memorabilia, Miscellaneous*)

Click the **"Add Specified Items"** to generate new fields where you can include Descriptions and Sum Insured for the specified item.

**Jewellery**

☒ Specified ☐ Unspecified

☐ Specified (in home safe) ☐ Specified (in bank vault)

Unspecified jewellery (worldwide) sum insured \$120,000

Unspecified jewellery (worldwide) single item limit \$25,000

Item #	Description	Sum insured	Last valuation date	
1	Diamond Ring	\$30,000	2/05/2023	<a href="#">Remove</a>
2	Engagement Ring	\$60,000	2/05/2023	<a href="#">Remove</a>
3	Gold Necklace	\$120,000	2/05/2023	<a href="#">Remove</a>
4	Rolex Watch	\$40,000	2/05/2023	<a href="#">Remove</a>
Total #	4	<a href="#">Add Specified Items</a>	\$250,000	

Specified jewellery (worldwide) sum insured \$250,000

Imposed excess

20. To add additional property, simply click on **Property Address(es)** on the left Navigation Bar and click **+ Add Location** and repeat the steps you just completed.

The screenshot shows the 'Property Address(es)' section of the Simplafy interface. On the left, a navigation bar lists several categories: Disclosure Details, Policy Details, Insured Details, Insurance History, and Property Address(es). The 'Property Address(es)' category is highlighted with a red circle and an arrow pointing to the main content area. The main content area is titled 'Property Address(es)' and contains a table with the following data:

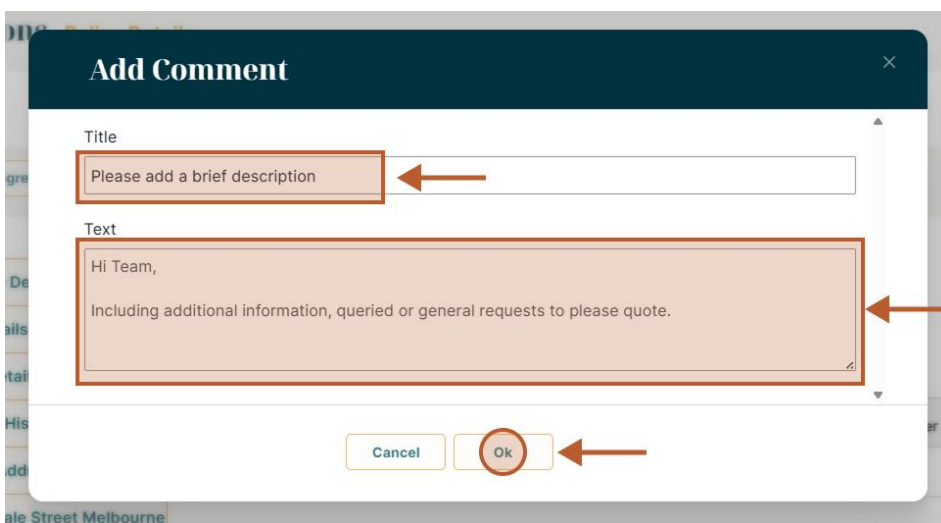
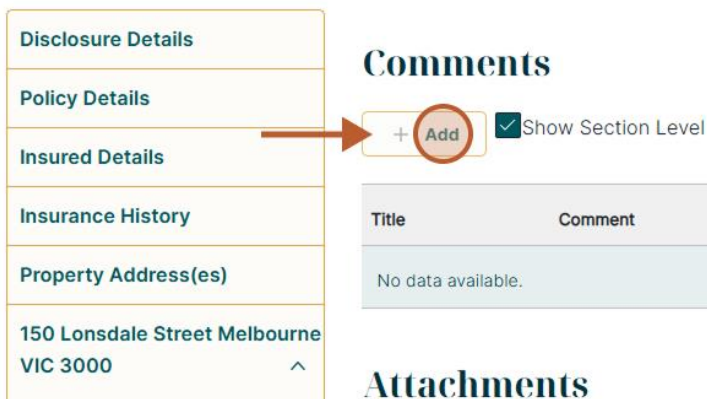
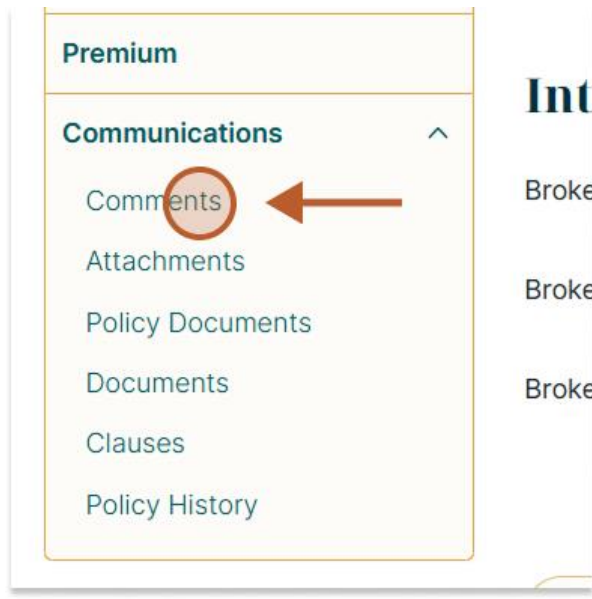
#	Address
1	150 Lonsdale Street Melbourne VIC 3000

Below the table, there is a '+ Add Location' button, which is also circled in red with an arrow pointing to it. At the bottom of the main content area, there is a 'Previous' button with a left arrow.

21. If you would like to provide additional information, we suggest leaving a comment. Go to the **Navigation Bar** and click on **Comments**.

This will take you to the **Communications Page** where you can click on the **+ Add button**. This will open a separate pop-up window where you can type in your comment for the Underwriting Team to review.

We suggest utilising this option when submitting a referral to provide further details to the Underwriting team.



22. You can also include attachments. Click on the **+ Add** button and select the file you wish to upload. You may only upload one file at a time.

23. To submit the quote request, click on the **Calculate Terms** button located left of the **Action Bar**. You will note that the status of the transaction has changed from Draft to Referral required.

24. If any details are missing, Simlafy will highlight them in **Red** under “The Following errors have occurred:”

Click on each error to navigate directly to the relevant section for review.

25. Once all issues are resolved, click **Calculate Terms** and proceed to **Submit Referral**.

Once you’ve clicked the **Submit Referral** button, this concludes the quote submission process. The status of the transaction is updated to Referral Underwriter.

The quote will automatically be sent to the Underwriting team for review.

Policy No.	Quote Ref.	Mode	Stage	Status	Term Start	Term End	Effective
M0012293	MANQTE00102426	Incomplete	New Business	Draft	30/03/2025	30/03/2026	30/03/2025

[Save Progress](#)
[Calculate Terms](#)
[Copy & Amend Quote](#)
[Lapse Quote](#)
[Abandon Quote](#)
[Duplicate](#)
[Quit](#)

[Disclosure Details](#)
[Policy Details](#)
[Insured Details](#)
[Insurance History](#)

This requires underwriter review, click on 'Submit Referral'. Add a Comment if needed:

Cover requires review

Cover requires review

Policy requires review

Cover requires review

Policy requires review

Policy No.	Quote Ref.	Mode	Stage	Status	Term Start	Term End	Effective
M0012348	MANQTE00102489	Incomplete	New Business	Referral required	27/02/2025	27/02/2026	27/02/2025

[Save Progress](#)
[Calculate Terms](#)
[Copy & Amend Quote](#)
[Lapse Quote](#)
[Abandon Quote](#)
[Submit Referral](#)
[Duplicate](#)
[Quit](#)

[Disclosure Details](#)
[Policy Details](#)
[Insured Details](#)
[Insurance History](#)
[Property Address\(es\)](#)

This requires underwriter review, click on 'Submit Referral'. Add a Comment if needed:

Cover requires review

Cover requires review

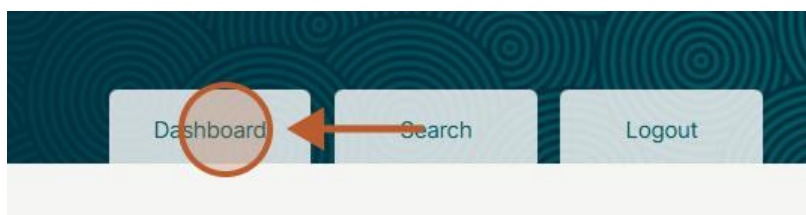
Cover requires review

Cover requires review

Policy requires review

Policy requires review

Navigate back to the **Dashboard** to view the status of the quote you just submitted for review. This should be the quote at the very top in the **Recently Accessed** list.



If the Status reads “**Referral Underwriter**” this means the quotation is with the Underwriting Team to review.

Retrieve existing quotes

[Recently Accessed](#)
[Incomplete Transactions](#)
[Renewals](#)

Policy Number	Quote Reference	Product	Term Start	Term End	Stage	Status	Insured Name
M0012239	MANQTE00102370	Mansions	30/03/2025	30/03/2026	New Business	Referral underwriter	Elizabeth Telingo

You’ll receive a notification via e-mail when the quotation has been actioned by an underwriter.



To view the quote, simply double-click anywhere on the row containing the policy/quote details. This will open the policy for further review or action.

Recently Accessed	Incomplete Transactions	Renewals
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Policy Number	Quote Reference	Product	Term Start	Term End	Stage	Status	Insured Name
M0012239	MANQTE00102632	Mansions	30/03/2025	30/03/2026	New Business	Acceptable	Elizabeth Telingo

To view the **Premium** by click **Premium** on the **Navigation Bar**.

You will note that the status of the transaction is updated from Acceptable to Offered.

Policy No.	Quote Ref.	Mode	Stage	Status	Term Start	Term End	Effective
M0012488	MANQTE00102633	Incomplete	New Business	Acceptable	30/03/2025	30/03/2026	30/03/2025

Save Progress

Bind & Close

Submit Referral

Calculate Terms

Copy & Amend Quote

Cancel Quote

Generate Offer

Abandon Quote

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Insurance History

Property Address(es)

148 Dendy Street Brighton East VIC 3187

Location Details

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## Premium

TransactionPolicy TermAnnual

Expand AllCollapse All

Description	Base Premium	ESL	GST	Stamp Duty	Total Premium	Comm. Comm.	GST	Amount Payable
Policy Premium Summary	\$11,445.14	\$0.00	\$1,144.53	\$1,201.99	\$13,791.66	\$0.00	\$0.00	\$13,791.66
148 Dendy Street Brighton East VIC 3187	\$10,927.14	\$0.00	\$1,092.73	\$1,201.99	\$13,221.86	\$0.00	\$0.00	\$13,221.86
Cyber	\$158.00	\$0.00	\$15.80		\$173.80	\$0.00	\$0.00	\$173.80
Agency Fee	\$360.00		\$36.00		\$396.00			\$396.00

Previous

The premium table will provide a simple view and a breakdown view, providing premiums for all locations noted on the policy.

To download the Quotation Letter, navigate to **Documents** located on the right **Navigation Bar**. Please note, it may take a few moments for the system to generate the Quotation. Refresh the page if the document has not generated.

Communications

Comments

Attachments

Policy Documents

**Documents**

Clauses

Policy History

Description	File Name	Date Added	User
No data available.			

Policy Documents

Mansions Executive Insurance Product Disclosure Statement (QMAN9214-0324)

SQUAS Financial Services Guide (effective 27 April 2023)

Mansions of Australia - Target Market Determination

Mansions of Australia - Key Facts Sheet - Building Insurance

Mansions of Australia - Key Facts Sheet - Contents Insurance

Interactive Guide

Risk Appetite Document

Features and Benefits Brochure

Family CyberSecure Overview

Family CyberSecure FAQ

Contact List

Documents

Description	File Name	Date Added
Mansions New Business Quotation	Mansions New Business Quotation (M0012488_MANQTE00102633).pdf	27/02/2025 8:54 pm

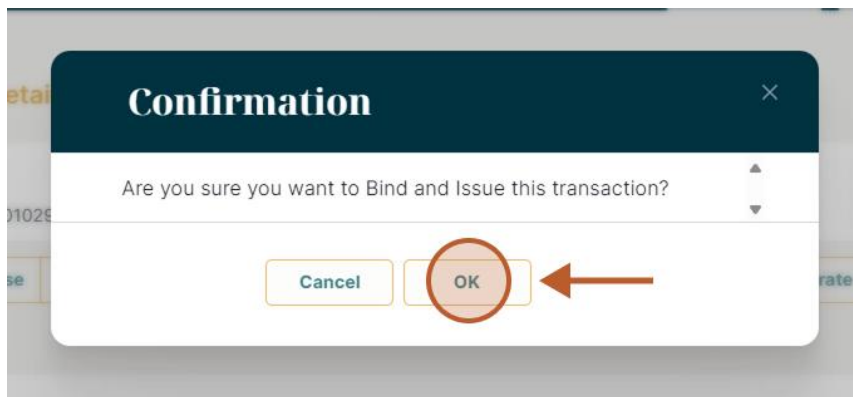
## Bind & Close

Once you are ready to finalise the quotation and proceed with cover, simply click on **Bind & Close**.

Policy No. M0012488	Quote Ref. MANQTE00102633	Mode Incomplete	Stage New Business	Status Acceptable	Term Start 30/03/2025	Term End 30/03/2026	Effective 30/03/2025
Save Progress	Bind & Close	Submit Referral	Calculate Terms	Copy & Amend Quote	Lapse Quote	Generate Offer	Abandon Quote

Please ensure you've selected the correct quotation if you've created duplicates for excess options.

Click **OK**. You have successfully bound a policy.



The status of the transaction is updated to Closed.

You can then click on **Document** location on the **Navigation Bar** to download the relevant Documents (Policy Schedule).