



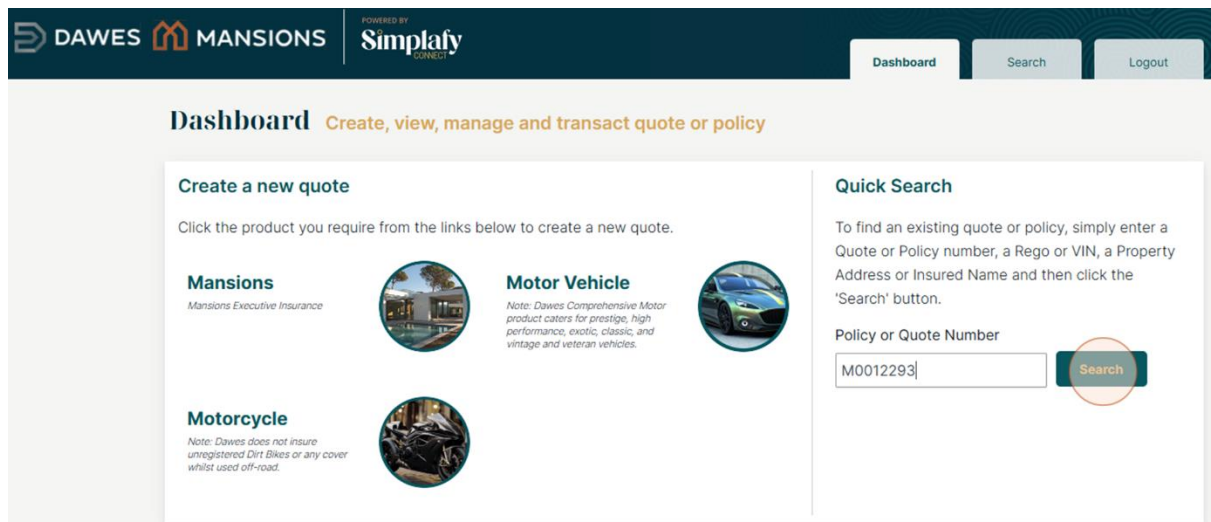
Broker User Guide

How to process
an Endorsement

Broker User Guide: How to process an Endorsement.

Once you've logged in, locate the policy you want to Endorse by browsing the tabs on the Dashboard or utilising the Quick Search tool by entering the Policy Number, Insured Name or Property Address.

1. Locate via Quick Search.
 - a. Type the Policy Number, Insured Name or Property Address in the search field and click **Search** to view.



2. Locate via Dashboard.
 - a. Scroll to policy in the Recent quote or policy section and double click to view.
 - b. You can also click on the tab next to Dashboard titled Search to find existing policies by more detailed parameters such as Product Term Dates and Status.

Dashboard
Search
Logout

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.

Quick Search

To find an existing quote or policy, simply enter a Quote or Policy number, a Rego or VIN, a Property Address or Insured Name and then click the 'Search' button.

Policy or Quote Number

Recent quote or policy

Retrieve existing quotes

Recently Accessed
Incomplete Transactions
Renewals

Policy Number	Quote Reference	Product	Term Start	Term End	Stage	Status	Insured Name
M0012293	MANQTE00102426	Mansions	30/03/2025	30/03/2026	New Business	Closed	Elizabeth Tellingo

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

Dashboard
Search
Logout

Mansions

Policy Details

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

Endorse Policy
Cancel Policy
Duplicate
Quit

Disclosure Details
Policy Details
Insured Details
Insurance History
Property Address(es)

Disclosure Details

Your Duty Not To Make A Misrepresentation

About Mansions

The contract of insurance is arranged by SGUAS Pty Ltd t/as Mansions (ABN 15 096 726 895, AFSL 234437)

4. Go to the Policy Details screen, enter the effective date and enter the reason for the endorsement.

Some examples of Endorsements you can do are:

- a. Update Insured details
- b. Add/Remove or Update Location Details
- c. Add/Remove or Update Sum Insured Details
- d. Add/Remove or Update Private Collection Details
- e. Update completion date on policy requirements

Mansions
Policy Details

Policy No.	Quote Ref.	Mode	Stage	Status	Term Start	Term End	Effective
M0012293	MANQTE00102473	Incomplete	Alteration	Draft	30/03/2025	30/03/2026	

Save Progress

Calculate Terms

Copy & Amend Quote

Abandon Quote

Duplicate

Quit

Disclosure Details

Policy Details

Insured Details

Insurance History

Property Address(es)

148 Dendy Street Brighton East VIC 3187

Policy Details

Effective date

Endorsement reason

Account

Yackandandah (YA0001)

Intermediary

- For this example, we will Add Jewellery to the Private Collection.
Click on "Private Collection" and then click on "Add Specified Items" at the end of the list.

Policy No.	Quote Ref.	Mode	Stage	Status	Term Start	Term End	Effective
M0012293	MANQTE00102473	Incomplete	Alteration	Referral required	30/03/2025	30/03/2026	31/03/2025

Save Progress

Submit Referral

Calculate Terms

Copy & Amend Quote

Abandon Quote

Duplicate

Quit

Insured Details

Insurance History

Property Address(es)

148 Dendy Street Brighton East VIC 3187

Location Details

Home

Contents

Private Collection

Premium

Communications

Comments

Attachments

Policy Documents

Documents

Clauses

Policy History

Situation Summary / Private Collection

Jewellery

Specified

Unspecified

Specified (in home safe)

Specified (in bank vault)

Unspecified jewellery (worldwide) sum insured

\$60,000

Unspecified jewellery (worldwide) single item limit

\$25,000

Item #	Description	Sum Insured	Last valuation date	
1	Diamond Ring	\$30,000	2/05/2023	Remove
2	Engagement Ring	\$60,000	2/05/2023	Remove
3	Gold Necklace	\$120,000	2/05/2023	Remove
4	Rolex Watch	\$40,000	dd / mm / yyyy	Remove
Total #	4	Add Specified Items	\$250,000	

6. Add the details of the additional item and Sum Insured. The total number of items will increase as will the total of Sum Insured. Please also review the further questions such as worldwide sum insured and how much is worn daily to ensure it encompasses the new information.

Item #	Description	Sum insured	Last valuation date	
1	Diamond Ring	\$30,000	2/05/2023	Remove
2	Engagement Ring	\$60,000	2/05/2023	Remove
3	Gold Necklace	\$120,000	2/05/2023	Remove
4	Rolex Watch	\$40,000	dd / mm / yyyy	Remove
5	Patek Philippe Aquanaut 5968R-001 Chronograph Ros	\$135,000	24/01/2025	Remove
Total #	5	Add Specified Items		\$385,000
Specified jewellery (worldwide) sum insured		\$385,000		
Imposed excess		000,000,000		

Additional Information - Jewellery

How much jewellery is worn daily?

How much jewellery is taken when travelling?

7. Comments

It is always appreciated if you can also leave some comments and/or supporting materials in the Comments section for the Underwriter to understand the nature of the transaction for an expeditious response. This allows them to better assess the impact of changes that you have made.

These comments and/or supporting materials can be included by navigating to the “Communications” section.

Go to Comments and/or Attachments and click the +Add button.

Premium

Communications

Comments

Attachments

Policy Documents

Documents

Clauses

Policy History

Comments

[+ Add](#) ☒ Show Section Level

Title	Comment
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No data available.

Attachments

Policy No.	Quote Ref.	Mode	Stage	Status	Term Start	Term End
M0012293	MANQTE00102473	Incomplete	Alteration	Draft	30/03/2025	30/03/2025

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

Disclosure Details

Policy Details

Insured Details

Insurance History

Property Address(es)

148 Dendy Street Brighton East
VIC 3187

Location Details

Home

Contents

Private Collection

Premium

Communications

Comments

Attachments

Policy Documents

Comments

[+ Add](#) ☒ Show Section Level

Title	Comment	Date
Insured Name - Additional Information	Hi Team, Noting down any additional information and queries I have as a Broker.	27/02/2025 11:17 am
adding jewellery	client has bought a new watch and will be wearing daily	27/02/2025 1:58 pm

Attachments

[+ Add](#)

Description	File Name	Date Added
invoice and valuation Patek Philippe Aquanaut 5968R	patek-philippe-aquanaut-5968r-001-chronograph-rose-gold-brown-dial-2025.html	27/02/2025 1:58 pm

- Once you have carried out all the changes for this Endorsement, simply click "Calculate Terms".

Mansions Policy Details

Policy No.	Quote Ref.	Mode	Stage	Status	Term Start	Term End	Effective
M0012293	MANQTE00102473	Incomplete	Alteration	Referral required	30/03/2025	30/03/2026	31/03/2025

Save Progress
 Submit Referral
 Calculate Terms
 Copy & Amend Quote
 Abandon Quote
 Duplicate
 Quit

Disclosure Details

Policy Details

Insured Details

Situation Summary / Private Collection

Jewellery

- Then click "Submit Referral" to submit the endorsement request for an underwriter to review the changes. The status will change to Referral Underwriter.

Mansions Policy Details

Policy No.	Quote Ref.	Mode	Stage	Status	Term Start	Term End	Effective
M0012293	MANQTE00102473	Incomplete	Alteration	Referral required	30/03/2025	30/03/2026	31/03/2025

Save Progress
 Submit Referral
 Calculate Terms
 Copy & Amend Quote
 Abandon Quote
 Duplicate
 Quit

Disclosure Details

Policy Details

Insured Details

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

Policy requires review
Cover requires review
Cover requires review

