

# Broker User Guide

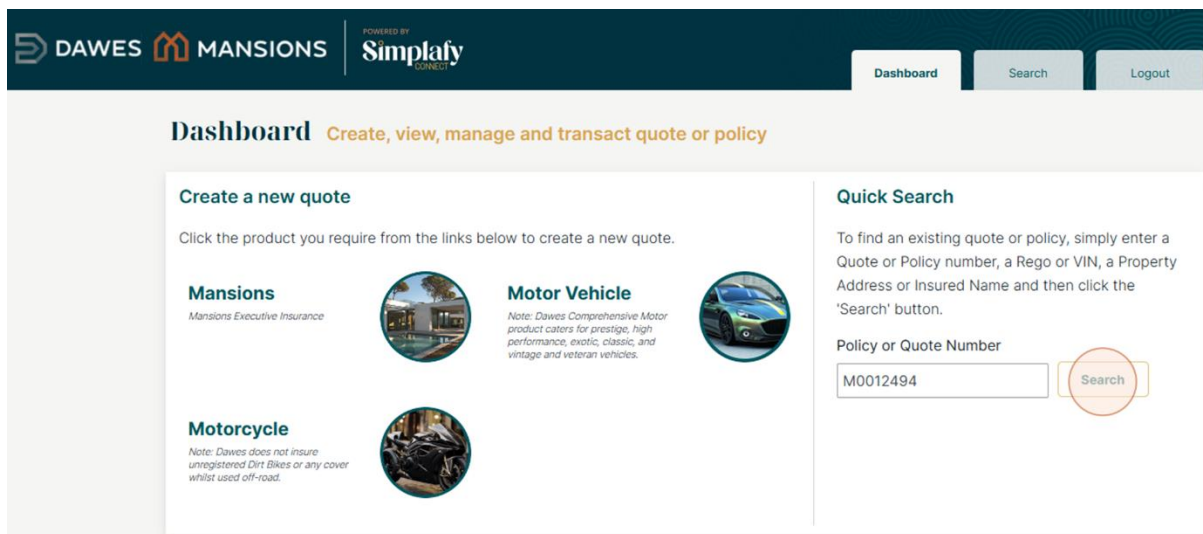
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How to initiate  
a Cancellation

## Broker User Guide: How to initiate a Cancellation

Once you've logged in, locate the policy you want to Cancel 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.

### Recent quote or policy

Retrieve existing quotes

Policy Number	Quote Reference	Product	Term Start	Term End	Stage	Status	Insured Name
M0012494	MANQTE00102639	Mansions	28/02/2025	28/02/2026	New Business	Closed	Bob Smith

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

Dashboard
Search
Logout

## Mansions

### Policy Details

Policy No.	Quote Ref.	Mode	Stage	Status	Term Start	Term End	Effective
M0012494	MANQTE00102639	Finalised	New Business	Closed	28/02/2025	28/02/2026	28/02/2025

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

### 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

- The Stage of the policy will change to Cancellation, Status, draft.

**Mansions Policy Details**

Policy No.	Quote Ref.	Mode	Stage	Status	Term Start	Term End	Effective
M0012494	MANQTE00102897	Incomplete	Cancellation	Draft	28/02/2025	28/02/2026	28/02/2025

Buttons: Calculate Terms, Abandon Quote, Duplicate, Quit

- Go to the Policy Details section to enter Effective date and the Cancellation Reason from the drop-down menu.

In this example we have selected the Due to Non-Payment reason in the drop-down menu.

**Mansions Policy Details**

Policy No.	Quote Ref.	Mode	Stage	Status	Term Start	Term End	Effective
M0012494	MANQTE00102897	Incomplete	Cancellation	Draft	28/02/2025	28/02/2026	28/02/2025

Buttons: Calculate Terms, Abandon Quote, Duplicate, Quit

Disclosure Details

**Policy Details**

Insured Details

Insurance History

Property Address(es)

83 Middle Road Exeter NSW 2579

**Policy Details**

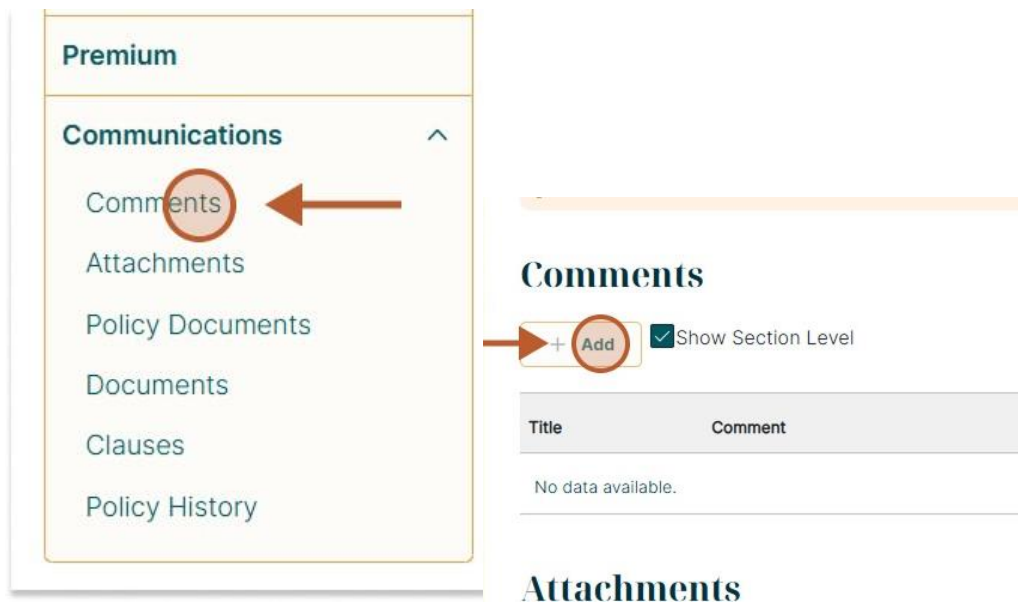
Effective date: 28/02/2025

Reason for cancellation: Due to Non-Payment

Account: Zetland (ZU0001)

**Intermediary**

- It is always appreciated if you can also leave some comments in the Comments section for the Underwriter to understand the nature of the transaction for an expeditious response. Just click on the **+Add** button.



- Once you have filled in the date and reason and made any necessary comments, simply click "Calculate Terms" and "Submit Referral" on the navigation menu to refer the policy to an Underwriter who will review and generate a cancellation premium for you.

The status of the transaction will be changed to Referral Underwriter.

