# User Guide:
# How to process an Endorsement.

**1** Once you've logged in, locate the policy you want to Endorse 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.

**2** Locate via Search tool.

**Quick Search**

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

Policy or Quote Number

MOVPOL11000165       Search

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

Comments

Attachments

Policy Documents

Documents

Clauses

Policy History

Endorse Policy

Cancel Policy

Duplicate

Quit

If you do not meet the above duty, we may reje misrepresentation was deliberate or reckless, th existed.

If our information or questions are unclear, plea

**Some Special Conditions**

The policy you are applying for contains some s Statement (PDS). We strongly recommend that conditions of the contract of insurance. All ques fully answer any question, please use the 'Addit unsure how to answer any questions you can co

☑ I have read and understood the Duty of Dis

**4** Navigate to the Policy & Insured Details screen to enter the date your Endorsement is effective from.

| Policy Ref. | Quote Ref. | Mode | Stage | Status |
| --- | --- | --- | --- | --- |
| MOVPOL11000165 | MOVQTE10001208 | Incomplete | Alteration | Draft |

**Disclosure Details**

**Policy & Insured Details** ⌃

    Policy Details

    Client Details

    Insured Details

**Drivers** ⌃

    Steve Macri

    Sally Macri

**Policy Details**

Effective

15/01/2024

Account

Zetland (ZU0001)

**Intermediary**

Broker Name           Broker Email

**5** Then simply navigate to the menu screen required and process your Endorsement. Some examples of Endorsements you can do are:

1. Update Insured Name

2. Add/Remove or Update Driver Details

3. Add/Remove or Update Vehicle Details

**6**  For this example we will Remove/Delete a vehicle. Click on "Vehicles" and then click on "Remove" of the specific vehicle you want to remove.



**7**  A pop up will generate just asking if this is due to a Total Loss claim. In this instance it is not, so click "No".

**8**    Once you have carried out all of the changes for this Endorsement, the system will identify if there is any Premium applicable whether an Endorsement Premium or a Return Premium (or Nil premium in some instances). To view this, simply click "Premium" on the navigation menu.
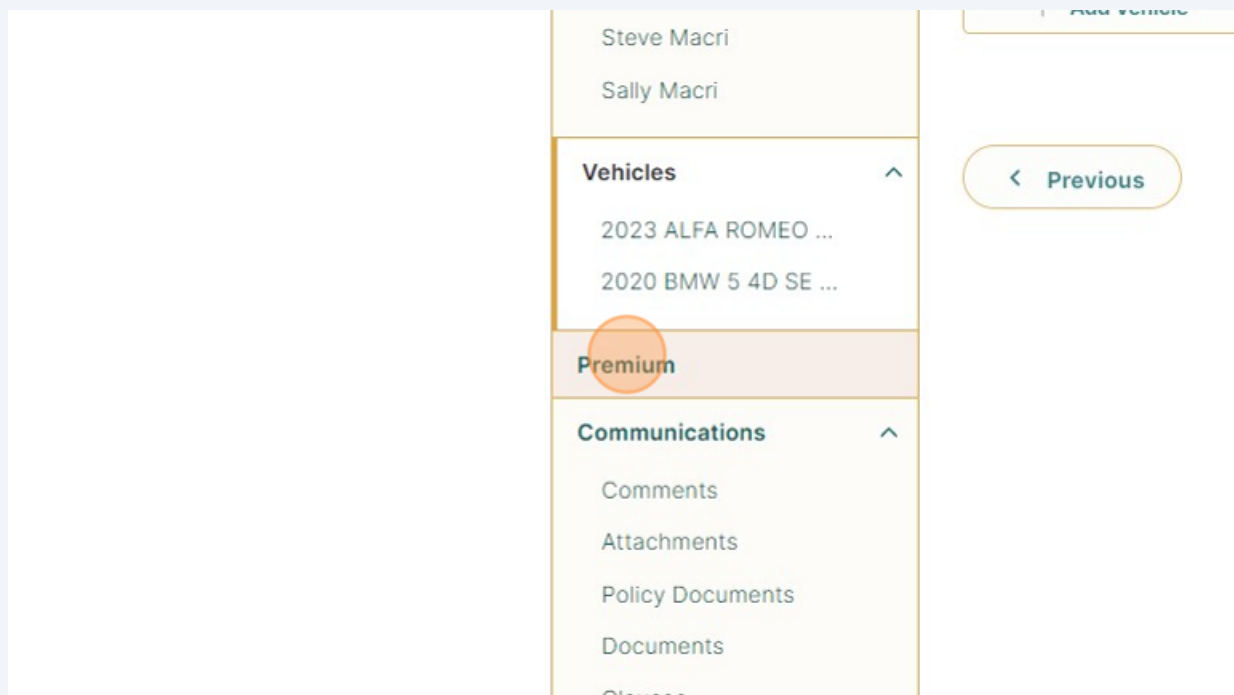


**9**    As we removed a vehicle for this Endorsement you can see the Return Premium applicable for that risk including all charges based on the Effective Date you entered.

**10** To ensure all system processes have been carried out, click on Calculate Terms. This will also provide you with extra menu options to proceed with if required (such as Generate Offer which provides you with the Quotation Summary) and also make the Bind & Close button available.
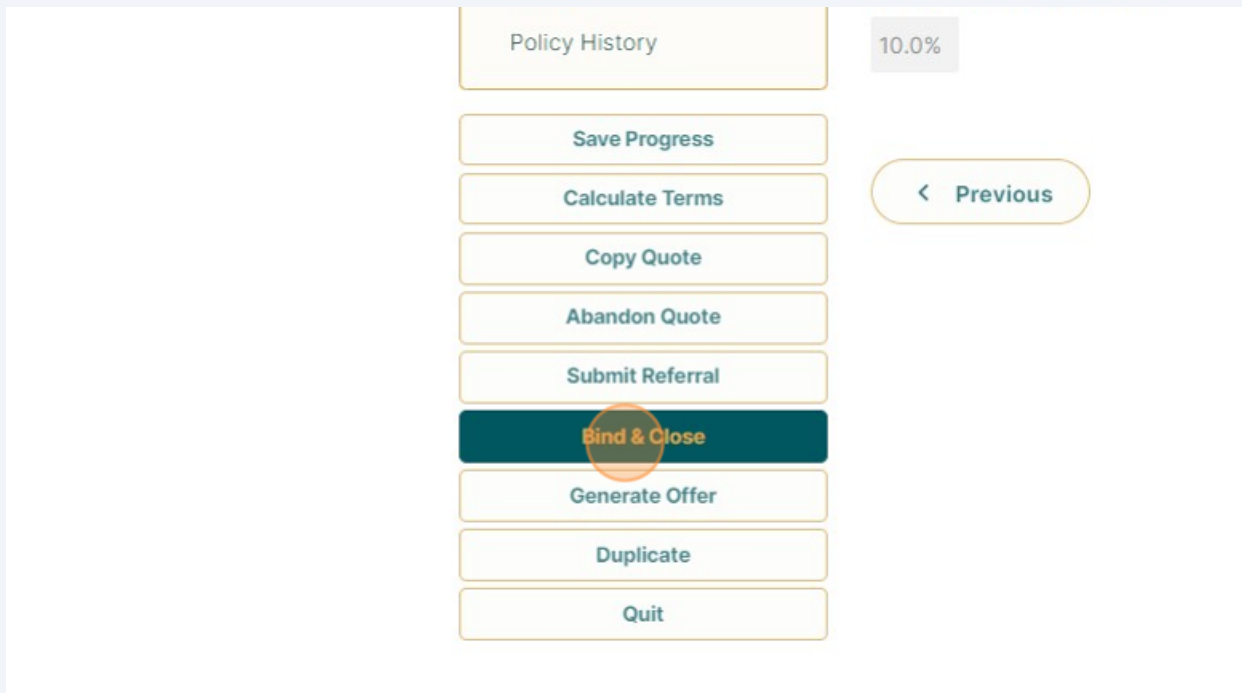


**11** You can still Submit Referrals to underwriters, if need be, prior to binding (remember to add a comment to assist them).
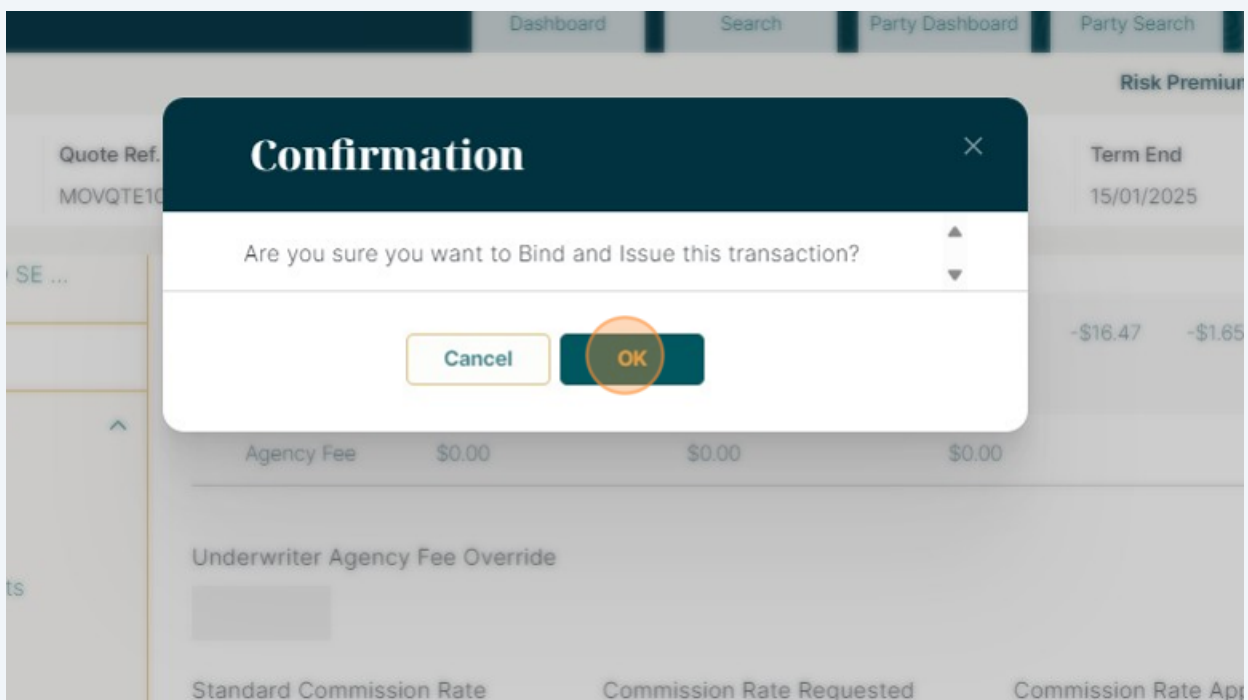
**12** Once ready, simply click "Bind & Close".



**13** Click "OK"

**14** To view & download the Endorsement Schedule, click "Documents"



**15** Click on the "Motor Vehicle Endorsement Schedule" you require, if there are more than one, the date & time stamp will assist (NB: They will be in chronological order).

**16** 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 | Modified D |
| --- | --- | --- | --- | --- | --- |
| MOVQTE10001208 | Alteration | Closed | 1 | 20/01/2024 | 15/01/202 |
| MOVQTE10001206 | New Business | Closed | 1 | 15/01/2024 | 15/01/202 |

View selected policy version