

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.

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 "Endorse Policy" to proceed.

4

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

Policy Code	Endorsement Code	Status	Stage	Version
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

MOVPOL11000165	MOVQTE10001208	Incomplete
<div>Insured Details</div> <div> <div>Drivers</div> <div>Steve Macri</div> <div>Sally Macri</div> </div> <div> <div>Vehicles</div> <div>2023 ALFA ROMEO ...</div> <div>2020 BMW 5 4D SE ...</div> </div> <div>Premium</div> <div> <div>Communications</div> <div>Comments</div> </div>		<div>Account</div> <div>Zetland (ZU0001)</div> <div>Intermediary</div> <div>Broker Name</div> <div>Broker2 Broker</div> <div>Are you the holding broke</div> <div>Yes No</div> <div>Client Details</div>

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.

Make	Model	
ALFA ROMEO	GIULIA	Remove
BMW	5	Remove

[Next →](#)

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".

le Policy

Quote Ref. MOVQTE10

Term End 15/01/2025

Confirmation

Is the deletion of 2020 BMW 5 4D SEDAN - XYZ321 due to a total loss?

Cancel

Yes

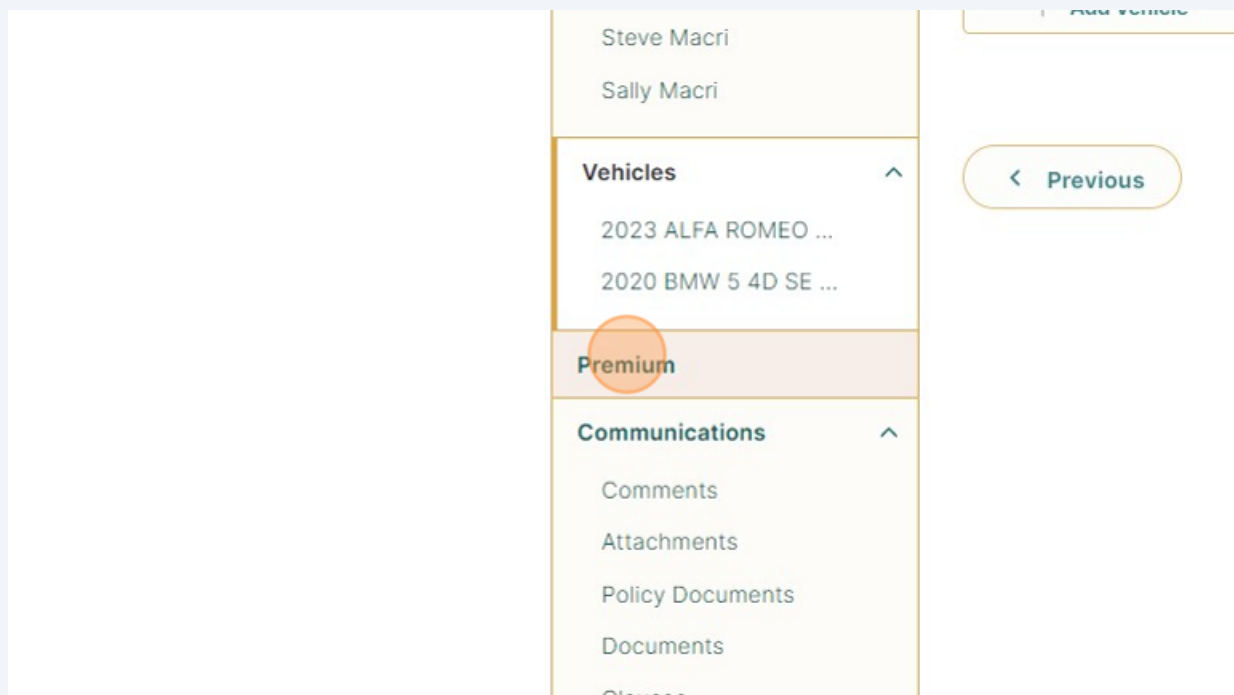
No

List of Vehicles

Vehicle Label	Make	Model
2023 ALFA ROMEO GIULIA 4D SEDAN - WERTYVN	ALFA ROMEO	GIULIA

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.

Policy Premium	^	-\$164.71	\$0.00	-\$16.47	-\$19.93	-\$201.11	-\$16.47	-\$1.65	-\$182.99
Summary									
Vehicle Summary	^	-\$164.71	\$0.00	-\$16.47	-\$19.93	-\$201.11	-\$16.47	-\$1.65	-\$182.99
2023 ALFA ROMEO		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
...									
2020 BMW 5 4D SE		-\$164.71		-\$16.47	-\$19.93	-\$201.11	-\$16.47	-\$1.65	-\$182.99
...									
Agency Fee		\$0.00		\$0.00		\$0.00			\$0.00
Underwriter Agency Fee Override									
<input type="text"/>									

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.

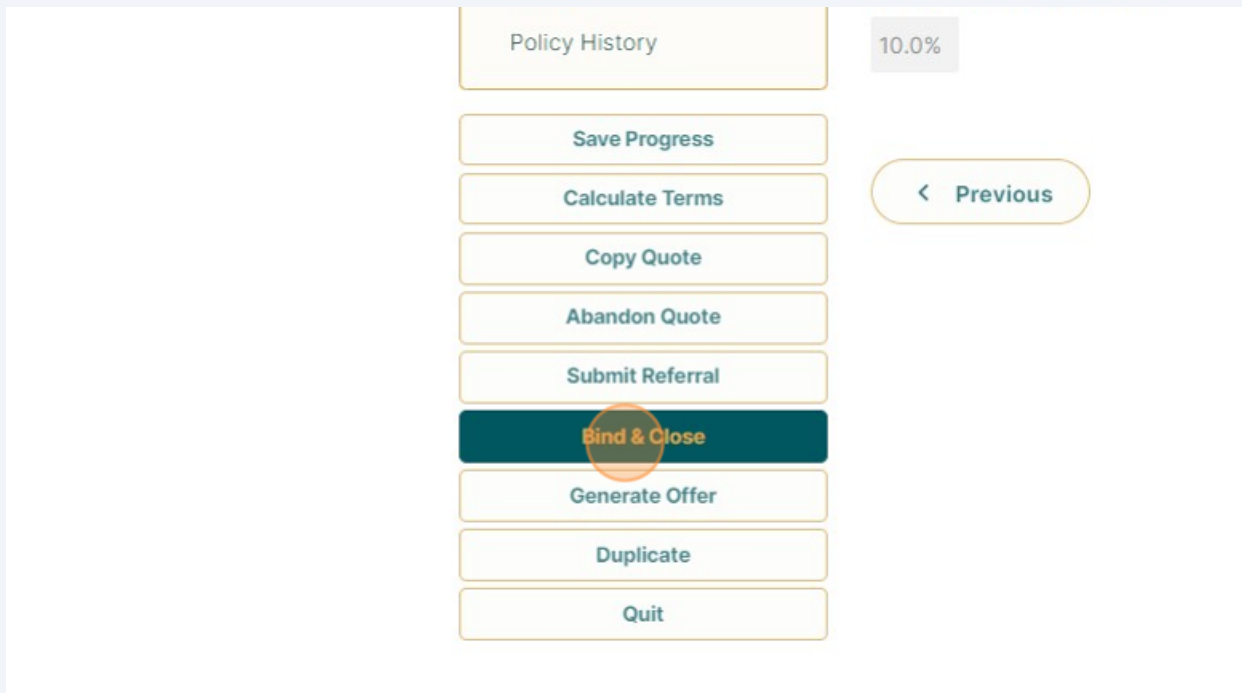
The screenshot shows a sidebar menu on the left with the following items: Policy Documents, Documents, Clauses, and Policy History. Below the menu is a vertical stack of buttons: Save Progress, Calculate Terms (highlighted with an orange circle), Copy Quote, Abandon Quote, Submit Referral, Duplicate, and Quit. On the right side of the interface, there are two input fields: 'Agency Fee' with a value of '\$0.00' and 'Underwriter Agency Fee Override' with a value of '10.0%'. A 'Previous' button is located at the bottom right of the main content area.

11

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

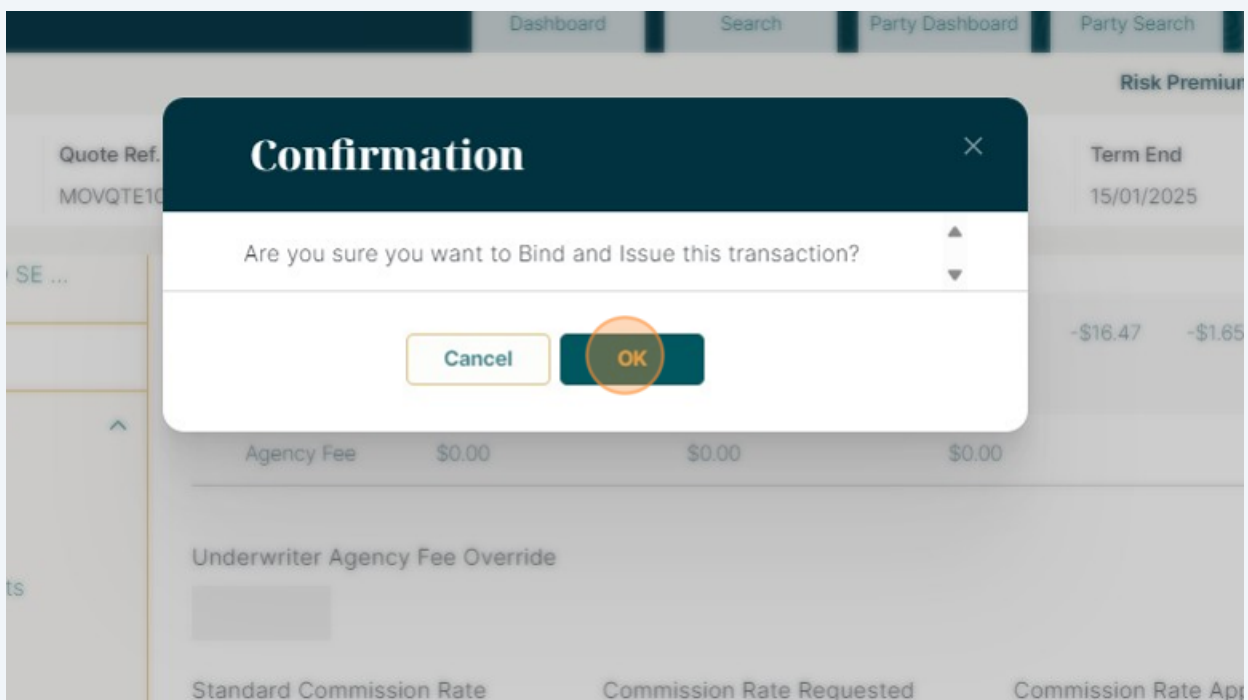
The screenshot shows a sidebar menu on the left with the following items: Policy History, Save Progress, Calculate Terms, Copy Quote, Abandon Quote, Submit Referral (highlighted with an orange circle), Bind & Close, Generate Offer, Duplicate, and Quit. On the right side of the interface, there is a 'Previous' button and a '10.0%' value displayed in a grey box.

12 Once ready, simply click "Bind & Close".



The screenshot shows a vertical list of buttons on the left side of the interface. The buttons are: "Policy History", "Save Progress", "Calculate Terms", "Copy Quote", "Abandon Quote", "Submit Referral", "Bind & Close" (highlighted with an orange circle), "Generate Offer", "Duplicate", and "Quit". To the right of these buttons is a "Previous" button with a left-pointing arrow. Above the "Previous" button is a "10.0%" label.

13 Click "OK"



The screenshot shows a "Confirmation" dialog box with a dark blue header and a white body. The header contains the text "Confirmation" and a close button (X). The body contains the text "Are you sure you want to Bind and Issue this transaction?". Below the text are two buttons: "Cancel" and "OK" (highlighted with an orange circle). The background of the screenshot shows a blurred view of the Simplafy Connect interface, including a "Quote Ref." field, a "Term End" field, and a table with columns for "Agency Fee", "Standard Commission Rate", "Commission Rate Requested", and "Commission Rate Applied".

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).

Quote Ref.	Mode	Stage	Status	Term Start	Term End	Effective
MOVQTE10001208	Finalised	Alteration	Closed	15/01/2024	15/01/2025	20/01/2024

Documents

Description	File Name	Date Added
Motor Vehicle Endorsement Schedule	Motor Vehicle Endorsement Schedule (MOVPOL11000165).pdf	15/01/2024 2:45 pm
Motor Vehicle Certificate Of Currency	Motor Vehicle Certificate Of Currency (MOVPOL11000165).pdf	15/01/2024 2:45 pm
Motor Vehicle Extract	Motor Vehicle Extract (MOVPOL11000165).xml	15/01/2024 2:45 pm
Motor Vehicle New Business Schedule	Motor Vehicle New Business Schedule (MOVPOL11000165).pdf	15/01/2024 2:30 pm

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](#)