

## Welcome to the Plus Indemnity Broker Portal

*Click each heading to jump to that section within the document*

### Quick Start Guide

- ☰ A quick reference of what the Portal can do and how it works- **Auto Quote, Referred Quotes, Send Link to Client, Binding Cover, Resending Policy Documents**

### Who can I contact?

#### How to Access the Portal

- ☰ Activating Your Account
- ☰ Setting your password
- ☰ Accessing the Portal
- ☰ Resetting Your Password

### Dashboard

- ☰ Lists and functions

### New Business Quotes

- ☰ Over 450 Professional Services - over 250 have the potential to auto-rate
- ☰ Get instant indications of price
- ☰ NSW Small Business Insurance Duty Exemption Declaration question – no exemption document required

### Send a link to your client

- ☰ Your client can review the detail in the proposal form and submit their confirmation of answers back to you before you submit it to us

### Summary Screen

- ☰ A summary of your quote, alternative limit and excess options

### Navigation across the top of the screens

- ☰ Learn how to navigate through the screens using the links at the top of the screens

### Print/Download Proposal

- ☰ Save or print a copy of the proposal answers in a PDF file

### Bind Cover

- ☰ Immediately receive your Policy Documents and Certificate of Currency

### Refer or Message the Underwriter

- ☰ For an account you are trying to win, requesting altered terms or any other reason, you can type a message, upload documents and 'Refer to Underwriter' to review the automatically produced quote

### Referred Quotes

- ☰ Receive a response to your Referred quotes within 24 hours (on the next business day)

### Renewal Quotes

- ☰ Expiring terms based on previously disclosed information are released to the Portal, and can be bound subject to there being no material change to the risk and subject to qualifying criteria

### How to Search and Resend Documents

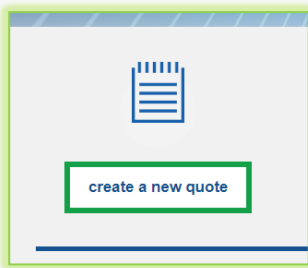
- ☰ All quotes and policies linked to your brokerage are visible on the Portal
- ☰ Ability to email Policy Schedule and/or Certificate of Currency from Policy List

## QUICK START GUIDE

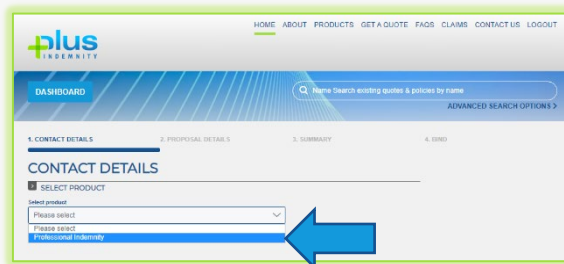
This provides a quick reference of what the Portal can do and how it works- **Auto Quote, Referred Quotes, Send Link to Client, Binding Cover**. For more detailed instructions, including how to Access the Portal, please click [here](#) or click each sub-heading to take you to more detailed instructions.

### START A NEW QUOTE

Click create a new quote

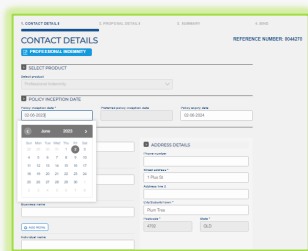


From the drop-down box, select the Professional Indemnity



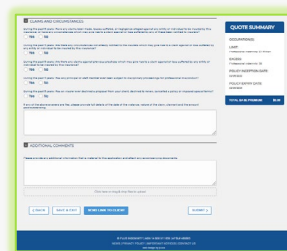
**AUTO QUOTES** – a quote indication is generated once all Proposal details have been entered. A formal binding quote can be emailed and bound on-line.

#### Contact Details



- ▶ select the period of insurance
- ▶ Add additional Legal, Trading, Business or Individual Names

#### Proposal Details



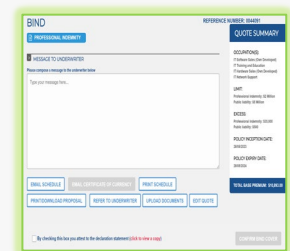
- ▶ Complete the proposal
- ▶ [Send Link to Client](#) for their review

#### Quote Summary



- ▶ Alternative Limits are available for selection
- ▶ Send a [Quote Summary](#) email

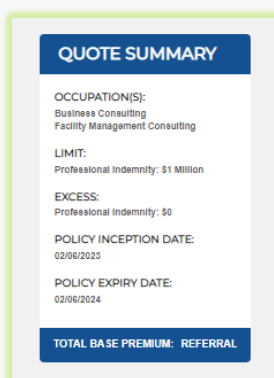
#### Bind Screen



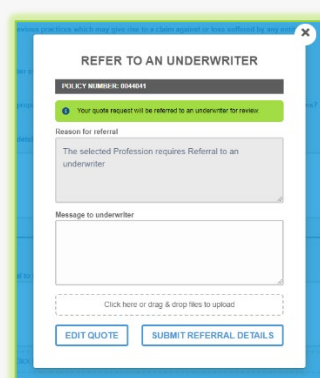
- ▶ Option to [Refer to Underwriter](#)
- ▶ Attach documents
- ▶ [Bind Cover](#)

**REFERRED QUOTES** – detail(s) need to be reviewed by an underwriter before a formal response can be provided. You will receive a response within 24 hours on the next business day and if accepted, this appears as a Quoted in your Dashboard.

#### Proposal Details



#### Referral Pop-Up



#### Response Within 24 Hours

Receive response from our Plus Indemnity Underwriters on the next business day

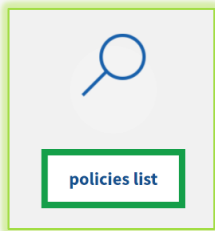
- ▶ Accepted & Quoted; or
- ▶ Request for more information; or
- ▶ Declined to quote



## RESENDING POLICY DOCUMENTS

### Policies List

Go to Policies List in the Dashboard

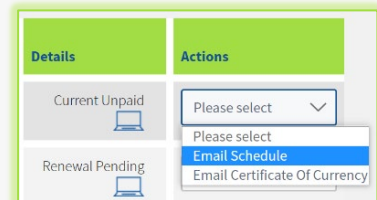


### Locate Policy

- ▶ Locate the Policy in the POLICIES LIST
- ▶ In the Actions column is the option to Email Schedule or Email Certificate of Currency

### Select The Document

- ▶ Select the document to be emailed



- ▶ Enter the email address the documents are to be sent to
- ▶ Confirmation the email has been sent appears in a Pop-up

## WHO CAN I CONTACT?

- ▶ To get help filling in the proposal – please phone or email your underwriting contact
- ▶ If you receive an error - please email [uw@plusindemnity.au](mailto:uw@plusindemnity.au) and cc your underwriting contact with details of the action you were performing and any supporting screen shots as these will greatly assist with resolving the problem

Our contact details are:

Who	Title	Call	Email
Steven Duckworth	Senior Underwriter	0431 796 953	<a href="mailto:stevend@plusindemnity.au">stevend@plusindemnity.au</a>
Melinda Farlow	Senior Underwriter	0418 452 277	<a href="mailto:melindaf@plusindemnity.au">melindaf@plusindemnity.au</a>
Rhythm Valera	Senior Underwriter-GL	0421 773 143	<a href="mailto:rhythmv@plusindemnity.au">rhythmv@plusindemnity.au</a>
Andrea Skan	Senior Underwriter	0419 237 270	<a href="mailto:andreas@plusindemnity.au">andreas@plusindemnity.au</a>
Sharmella Perera	Systems & Administration	0478 787 617	<a href="mailto:sharmellap@plusindemnity.au">sharmellap@plusindemnity.au</a>

## HOW TO ACCESS THE PORTAL

### Activating Your Account

When first registered on the Broker Portal, you will receive two emails:

- ▶ Welcome to the Broker Portal email containing a link to the portal and requesting to verify and activate your account.
  - ★ Bookmark or save as Favourite in your Browser to return easily at any time. ★
- ▶ Broker Portal Activation email that contains your temporary password.

Click the link to access the [login](#) screen, enter your username and temporary password, click Submit. You will be required to set a new password.

### Setting Your Password

When asked to set a new password, enter the New Password you wish to set for the Portal, then re- enter the Password to confirm the password. Click **Submit**.

You will receive a message on screen to confirm your "Password update successfully. [Click here](#) to login.

**Note:** Passwords are case sensitive and do NOT accept special characters

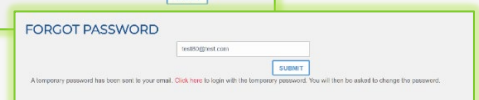
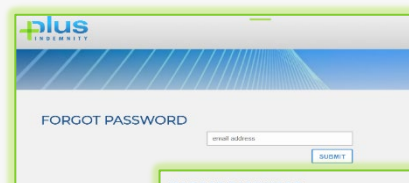
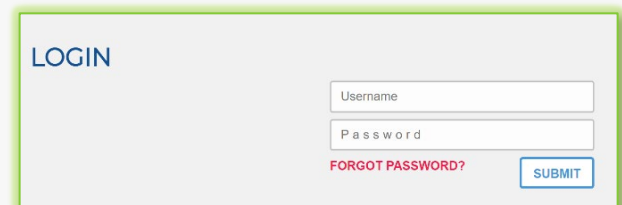
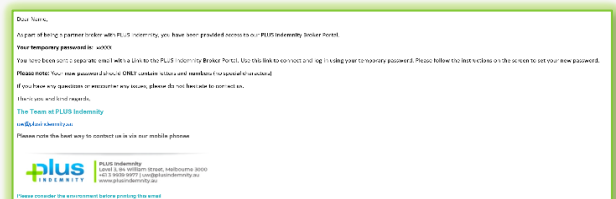
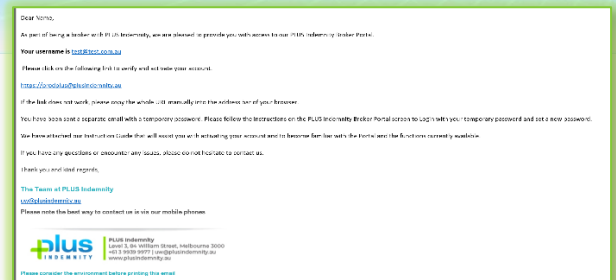
### Enter log-in details

Upon confirmation of setting your password, the screen will reset the LOGIN screen

- ▶ Enter your username (email address) and new password.

### Resetting Your Password

- ▶ On the LOGIN screen click **FORGOT PASSWORD?**, enter your email address and click **SUBMIT** button.
- ▶ You will receive a confirmation message on screen and an email containing a temporary password will be sent.
- ▶ Follow the instructions for Setting your Password in the email (and above). You will then be able to log in with your new password.

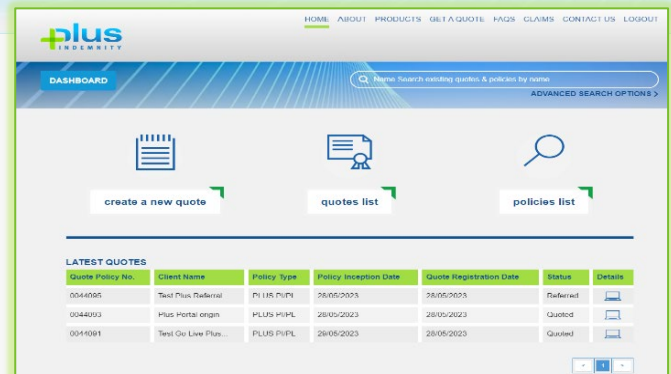


# PLUS INDEMNITY Broker Portal

## DASHBOARD

This is the Dashboard. You can:

- ▶ Create a new quote
- ▶ Search existing Quotes
- ▶ Search existing Policies
- ▶ See a list of Latest Quotes
- ▶ Advanced Search of quotes and policies



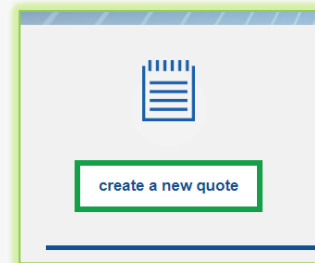
## NEW BUSINESS QUOTES

### FEATURES

- ▶ All the proposal information is captured in the one screen

### Instant Saving of information

- ▶ Details entered into the proposal are saved every time you move to the next question (no loss of data if you have a break in connection)



### Selection of Policy Inception and Policy Expiry Date

- ▶ Allows you to request common due dates etc

### Insured Details

- ▶ Complete your client's details, including any Trading, Business or additional names
- ▶ Mandatory fields are denoted by an \*
- ▶ Begin typing the suburb and select from the list to populate the Postcode and State fields

### Smart Search all available Professional Services

- ▶ in ALL Profession groups by entering a phrase that searches all words within the Profession description
- ▶ Ability to provide additional details on the selected Professional Service

### Can't find the Professional Service?

- ▶ Select an Industry, then search within industry grouping

# PLUS INDEMNITY Broker Portal

Floats with you as you move up and down the screen

## Floating Quote Summary

- ▶ 'floats' with you on screen as you enter the data
- ▶ shows the Base Premium as you input the data; OR
- ▶ shows **Referred** immediately if the quote will be required to refer to an underwriter for review (no Premium shows)

## Fee Income by State/Territory

- ▶ Tick if your client is exempt from paying stamp duty and BROWSE to attach the relevant exemption certificate
- ▶ NSW Small Business Exemption from Insurance Duty declaration question will appear when relevant.  
Only click Yes if you have received a completed, signed and dated Exemption Declaration.

## Dynamic Questions

- ▶ Additional tables or questions only appear when relevant to the Profession selected

Sample provided for Engineering Professions

## Limit, Excess and Broker Commission sliders

- ▶ Slide to adjust
- ▶ A higher than standard excess will attract a discount
- ▶ A lower excess will Refer for approval
- ▶ Reducing your commission will reduce the premium

## Additional Comments & Information

- ▶ Enter any details that need to be declared and form part of the proposal form information
- ▶ Comments received from your client will appear in this box

## Upload Documents

- ▶ Drag & Drop or Click to Browse to upload documents to the proposal

## Options at end of proposal

- ▶ BACK to return to the Contact Details
- ▶ SAVE & EXIT - Details are saved to return to at a late time
- ▶ SEND LINK TO CLIENT (see below)
- ▶ Click SUBMIT to proceed to the next page

## SEND LINK TO CLIENT

SEND LINK TO CLIENT

- ▶ Enter a personalised message to your client to appear in the email that is generated
- ▶ The email contains a link for your client to review and edit the proposal details
- ▶ The link will be valid for 10 days
- ▶ Your client can:
  - Choose their Preferred Inception Date
  - Amend proposal answers
  - Save/Print a copy of their proposal when completed
- ▶ Your client's answers are **only** submitted to you (not to Plus Indemnity)
- ▶ Once submitted by your client:
  - Their answers become Read Only
  - You will be notified via email
  - You can review and modify before submitting to Plus Indemnity
- ▶ You can see the status of your client's proposal at any stage:

Proposal Sent



Your client has not reviewed or returned the proposal to you

Proposal Completed



Your client has reviewed and returned the proposal to you. You will receive an email to notify you of this.

## RETRIEVE PROPOSAL

RETRIEVE QUOTE >

- ▶ If you need to withdraw from sending the proposal link to your client, you can click RETRIEVE QUOTE in the CONTACT DETAILS screen. This will allow you to edit the proposal details.

EXIT WITHOUT SAVING

RETRIEVE QUOTE >

NEXT >

## WHAT YOUR CLIENT SEES

- ▶ The personalised message to your client appears in the email they receive (see above)
- ▶ Your client can elect a Preferred Policy Inception Date
- ▶ The Proposal questions mimic those you see in the PROPOSAL DETAILS screen excluding the Broker Commission slider and floating QUOTE SUMMARY
- ▶ They have the ability to provide further information in the ADDITIONAL COMMENTS box
- ▶ When **SUBMIT >** is clicked a confirmation message appears.
- ▶ You will be notified via email



## SUMMARY SCREEN

This screen summarises your quote in an easy to read page

From here you can:

1. Enter a Broker Fee\* (inclusive of GST) to appear in your quote.
  - \* not included as part of the Net Premium Payable as this is not collected by Plus Indemnity.
2. Select the limit option you require (including Broadform Liability below, if included)
3. Select an alternative Excess (slider) and see the premium update
4. View the Applicable Endorsements and/or Special Terms & Conditions (where applicable)
5. [EDIT QUOTE](#) EDIT QUOTE allows the CONTACT DETAILS and PROPOSAL DETAILS screens to be amended
6. [EMAIL SUMMARY](#) EMAIL SUMMARY to email a Summary of the Quote cover to a nominated email address

7. [PRINT/DOWNLOAD PROPOSAL](#) To launch a new window with a PDF record of the portal Proposal answers (see the Print/Download Proposal section). **Please allow pop-ups for this website.**
8. [NEXT >](#) To proceed to the BIND screen

1. CONTACT DETAILS | 2. PROPOSAL DETAILS | 3. SUMMARY | 4. BIND

REFERENCE NUMBER: 0044068

### SUMMARY

2 PROFESSIONAL INDEMNITY

1 PREMIUM SUMMARY ALL SECTIONS

	Professional Indemnity Premium	Broadform Premium	Total Premium
Premium	\$6,276.00	\$371.00	\$6,647.00
GST	\$627.60	\$37.10	\$664.70
Stamp duty	\$759.40	\$44.89	\$804.29
Policy fee (incl.GST)	\$165.00	\$0.00	\$165.00
Enter Broker Fee inclusive of GST			\$0.00
<b>Total premium payable</b>	<b>\$7,828.00</b>	<b>\$452.99</b>	<b>\$8,280.99</b>
Broker commission (15%)	\$941.40	\$65.65	\$997.05
Broker commission GST	\$94.14	\$5.57	\$99.71
<b>Net premium payable</b>	<b>\$8,792.46</b>	<b>\$391.77</b>	<b>\$9,184.23</b>

2 SELECTED COVER DETAILS

Policy inception date & time: 12/06/2023, 04:00 PM

Professional Services (Business Activities Covered): Civil Engineering, Economic Consulting, Project Management

Limits: \$1,000,000 - Professional Indemnity Cost Exclusive, \$10,000,000 - Broadform Liability

Excess: \$5,000 - Professional Indemnity Cost Inclusive, \$000 - Broadform Liability

State split: SA 100%

3 PROFESSIONAL INDEMNITY ALTERNATIVE LIMIT

Click to select limit	\$1,000,000.00 Limit	\$2,000,000.00 Limit	\$5,000,000.00 Limit	\$10,000,000.00 Limit
Premium	\$6,276.00	\$7,807.00	\$9,310.00	\$12,912.00
GST	\$627.60	\$780.70	\$931.00	\$1,291.20
Stamp duty	\$759.40	\$925.50	\$1,139.84	\$1,466.55
Policy fee (incl.GST)	\$165.00	\$165.00	\$165.00	\$165.00
<b>Total premium payable</b>	<b>\$7,828.00</b>	<b>\$9,514.20</b>	<b>\$12,372.44</b>	<b>\$14,965.75</b>
Broker commission (15%)	\$941.40	\$1,148.55	\$1,487.40	\$1,816.80
Broker commission GST	\$94.14	\$114.86	\$148.74	\$191.65
<b>Net premium payable</b>	<b>\$8,792.46</b>	<b>\$8,269.79</b>	<b>\$10,836.30</b>	<b>\$12,866.27</b>

4 PROFESSIONAL INDEMNITY COVER DETAILS

Professional Services Covered: Civil Engineering, Economic Consulting, Project Management

Excess to higher excess will attract a premium discount

5 APPLICABLE ENDORSEMENTS

Facade Paneling Exclusion: [View wording](#)

Project/Construction Managers: [View wording](#)

Project and Construction Managers Exclusion: [View wording](#)

Excess Applying to Legal Costs: [View wording](#)

6 BROADFORM LIABILITY POLICY

Click to select limit	\$5,000,000.00	\$10,000,000.00	\$20,000,000.00
Broadform Liability Limit(Public/Products/Advertising Limit)	\$5,000,000.00	\$10,000,000.00	\$20,000,000.00
Premium	\$295.00	\$371.00	\$481.00
GST	\$29.50	\$37.10	\$48.10
Stamp duty	\$35.82	\$44.89	\$58.20
Policy fee (incl.GST)	\$0.00	\$0.00	\$0.00
<b>Total premium payable</b>	<b>\$360.42</b>	<b>\$452.99</b>	<b>\$587.30</b>
Broker commission (15%)	\$44.40	\$55.65	\$72.15
Broker commission GST	\$4.44	\$5.57	\$7.22
<b>Net premium payable</b>	<b>\$372.58</b>	<b>\$391.77</b>	<b>\$507.93</b>

7 BROADFORM LIABILITY COVER DETAILS

Business Activities Covered: Civil Engineering, Economic Consulting, Project Management

Excess: \$500

8 APPLICABLE ENDORSEMENTS

Office Based Exposure Only - No Manual Work: [View wording](#)

Project or Construction Managers/Contractors Exclusion: [View wording](#)

9 SPECIAL TERMS & CONDITIONS

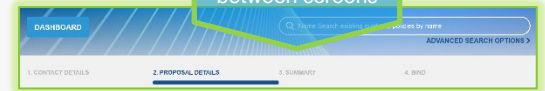
5. [EDIT QUOTE](#) | 6. [EMAIL SUMMARY](#) | 7. [PRINT/DOWNLOAD PROPOSAL](#) | 8. [NEXT >](#)

# PLUS INDEMNITY Broker Portal

## NAVIGATION AT THE TOP OF EACH PAGE

Once the proposal details are completed and a quote is available, the screen headers can be used to navigate between the pages

Click here to navigate between screens



## PRINT / DOWNLOAD PROPOSAL

This is a record of the answers entered in the Portal proposal details page that can be printed and/or saved.

This includes a declaration statement for you to gain your client's sign-off on the information provided

You are **not** required to send this completed form to Plus Indemnity

## BIND

Options on this screen

1. Type a message to the underwriter for review
2. **EMAIL SCHEDULE** to a nominated email address
3. **PRINT SCHEDULE** to open a PDF version of the relevant schedule
4. **PRINT/DOWNLOAD PROPOSAL** to open a new window with a PDF record of the portal Proposal answers (see the Print / Download Proposal section above)
5. **REFER TO UNDERWRITER** For reasons such as
  - ▶ the generated premium or terms are not competitive or require amending
  - ▶ Additional information has been provided e.g. company profile, contract details
6. **UPLOAD DOCUMENTS** to attach any supporting documents, e.g. CV/Resume, Company Profile, Contract Details, Existing Insurer's schedule, Completed Proposal form, etc
7. **EDIT QUOTE** EDIT QUOTE allows the CONTACT DETAILS and PROPOSAL DETAILS screens to be amended
8. **CONFIRM BIND COVER** button becomes active when you have read and ticked the box to confirm you agree to the **Declaration Statement**

By checking this box you attest to the declaration statement (click to view a copy)

CONFIRM BIND COVER

OK

A confirmation window pops-up to confirm the cover is bound and an email containing the policy documents will be sent to your email address.

## REFER TO OR MESSAGE THE UNDERWRITER

In the BIND screen you can elect to Refer your quote to an underwriter to review the automatically generated terms.

Reasons you may choose to Refer:

- ▶ You have additional information e.g. a company profile, contract details etc, you may like to attach to the submission via **Upload Documents**
- ▶ Enter a **Message to Underwriter** in the box provided with the message or information you would like the Underwriter to consider

You can find this functionality in the **BIND** screen

The screenshot shows the 'BIND' screen for 'PROFESSIONAL INDEMNITY' with reference number 0044068. The main area is titled 'MESSAGE TO UNDERWRITER' and contains a text box for 'Please compose a message to the underwriter below'. Below the text box are several buttons: 'EMAIL SCHEDULE', 'EMAIL CERTIFICATE OF CURRENCY', 'PRINT SCHEDULE', 'PRINT/DOWNLOAD PROPOSAL', 'REFER TO UNDERWRITER' (highlighted with a red box), 'UPLOAD DOCUMENTS', and 'EDIT QUOTE'. A 'CONFIRM BIND COVER' button is at the bottom right. A sidebar on the right titled 'QUOTE SUMMARY' lists 'OCCUPATIONISE' (Civil Engineering, Economic Consulting, Project Management), 'LIMIT' (Professional indemnity: \$1 Million, Public liability: \$10 Million), 'EXCESS' (Professional indemnity: \$5,000, Public liability: 0.0%), 'POLICY INCEPTION DATE' (12/06/2023), 'POLICY EXPIRY DATE' (12/06/2024), and 'TOTAL BASIC PREMIUM: \$6,647.00'. A checkbox at the bottom left is labeled 'By checking this box you attest to the declaration statement (click to view a copy)'.

## REFERRED QUOTES

When a quote requires referral to an underwriter, the following **REFER TO AN UNDERWRITER** screen will display

- ▶ Reasons for referral are displayed in the Referral pop-up

Other options available from this screen:

- ▶ **EDIT QUOTE** to return to the previous screen and edit the proposal information
- ▶ Click or drag & drop files to upload to assist with assessment of the risk e.g. Company Profile, Claim details, Risk Management procedures, completed proposal form, expiring schedule/details etc
- ▶ Enter a Message to Underwriter, to provide any further information you feel could assist with assessment

**SUBMIT REFERRAL DETAILS**

- ▶ You will receive confirmation that your Referral has been successfully submitted.
- ▶ An underwriter will assess and provide a response within 24 hours, on the next business day
- ▶ Your submission will have a '**Referred**' status in the Dashboard


The screenshot shows the 'REFER TO AN UNDERWRITER' screen for policy number 0037156. It features a green notification bar stating 'Your quote request will be referred to an underwriter for review.' Below this is a 'Reason for referral' section with a text box containing 'The answer to the specific Professional Services question requires referral'. There is also a 'Message to underwriter' text box and a dashed box for file uploads with the text 'Click here or drag & drop files to upload'. At the bottom are 'EDIT QUOTE' and 'SUBMIT REFERRAL DETAILS' buttons.

The screenshot shows a 'SUBMITTED' confirmation screen with the text 'Your Referral has been submitted' and an 'OK' button.



0037123	Good to know p/l	PI/PL-NPB	31/05/2023	22/05/2023	Referred	
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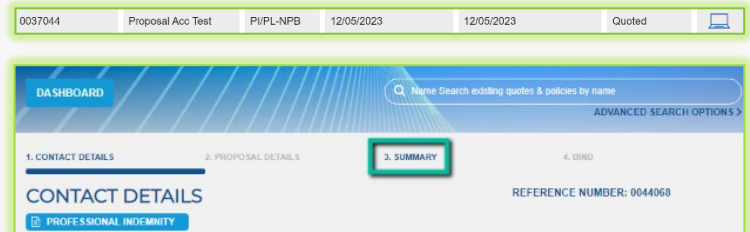
## APPROVED QUOTES

In the DASHBOARD when a Referred quote has been approved and quoted, the Status of quote will change to 'Quoted'. The underwriter may also issue the quote to you via email.

- ▶ Click  icon to open the CONTACT DETAILS screen

To view the SUMMARY either:

- ▶ Click SUMMARY at the top of the screen; OR
- ▶ Click  then  at the bottom of each screen

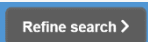


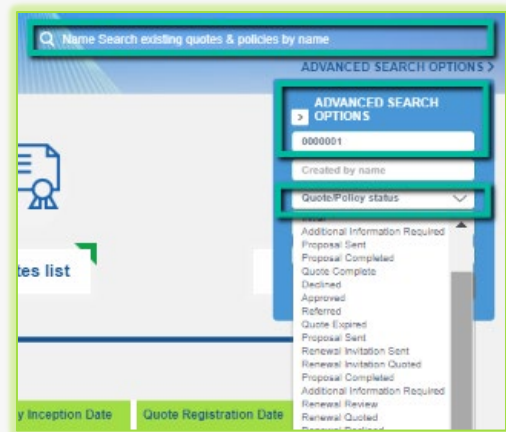
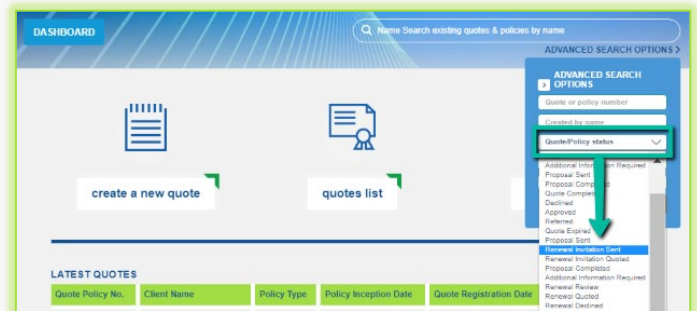
## RENEWAL QUOTES






Renewal quotes can be viewed and transacted on the Portal, subject to qualifying criteria

When a Renewal Invitation has been released and Auto-Quoted, the quote can be viewed and bound on the Portal

### Locating Your Renewals

- ▶ In the DASHBOARD, use the **Name Search** bar at the top OR
- ▶ Click **ADVANCED SEARCH OPTIONS**
- ▶ Type the Policy number OR Make a selection in the Quote/Policy status option . Select from:
  - Renewal Invitation Sent (invitation has been issued but not Auto Quoted)
  - Renewal Invitation Quoted (invitation has been issued and Quoted)
  - Renewal Review (Underwriter is reviewing)
  - Renewal Quoted (Renewal has been quoted)
- ▶ Select **Renewal Quoted** from the drop-down to view quoted renewals
- ▶ Click 



Quote Policy No.	Client Name	Policy Type	Policy Inception Date	Quote Registration Date	Status	Details	Actions
0036685-1	Test	PI/PL-NPB	15/03/2024	15/03/2023	Renewal Quoted		Please select
0020344-3	Damien John Mader	PI/PL	24/02/2023	17/01/2023	Renewal Quoted		Please select
0036528-1	Test 1 of Quote S...	PI/PL	08/04/2023	09/01/2023	Renewal Quoted		Please select
0036401-1	Kiyah Fama Test...	PI/PL	28/02/2023	29/11/2022	Renewal Quoted		Please select
0027326-2	China Marketing S...	PI/PL	16/02/2023	15/11/2022	Renewal Quoted		Please select

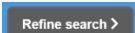
# PLUS INDEMNITY Broker Portal

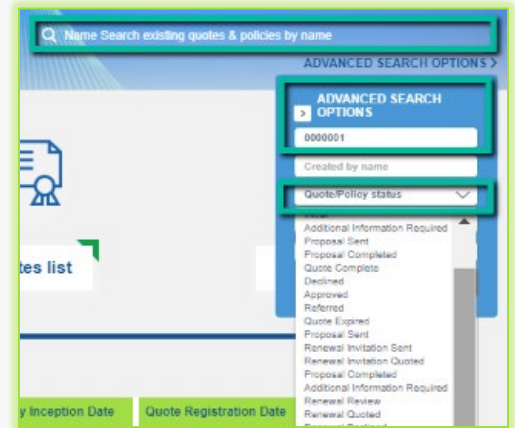
## HOW TO SEARCH

**NAME SEARCH** - Use the Name Search bar at the top to search by name match

- ▶ Enter the name and the search begins instantly
- ▶ The search results show below

**ADVANCED SEARCH** - Use the ADVANCED SEARCH OPTIONS to search by:

- ▶ Quote or Policy number (enter an \* before and after the policy number to search any policy period or quote/policy numbers that contain these numbers e.g. to search policy 0000311, enter \*311\*)
- ▶ Created by name = the person who created the quote
- ▶ Quote/Policy status
- ▶ Inception date from
- ▶ Inception date to
- ▶ Click 

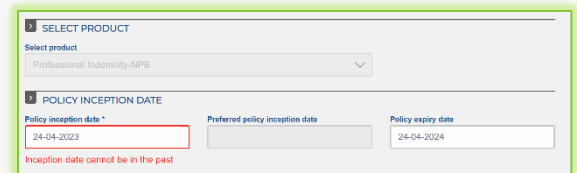


Return to **DASHBOARD** to clear the Search

## EXPIRED QUOTES

If a quote has expired, or a renewal quote is past the inception date of the beginning of the new policy period:

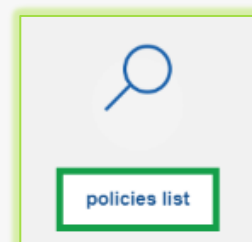
- ▶ You will be required to adjust the Inception date to a valid date > or = today's date
- ▶ When a valid date is entered, the EXPIRED QUOTE pop-up will display advising that by clicking the NEXT button you are confirming the details are true and correct and will create a valid quote for binding

A screenshot of a form with two sections. The first section is 'SELECT PRODUCT' with a dropdown menu showing 'Professional Indemnity-NPB'. The second section is 'POLICY INCEPTION DATE' with three input fields: 'Policy inception date \*' (containing '24-04-2023'), 'Preferred policy inception date', and 'Policy expiry date' (containing '24-04-2024'). A red box highlights the 'Policy inception date \*' field, and a red error message below it says 'Inception date cannot be in the past'.

## RESENDING POLICY DOCUMENTS

Accessing policies via this list allows you to select a policy document to be emailed to the nominated email address

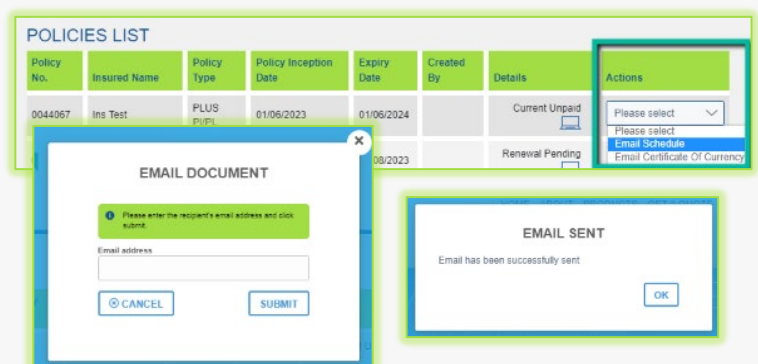
- ▶ Go to Policies List, scroll through the list of policies; OR
- ▶ Use the ADVANCED SEARCH OPTION to find the required policy



In the Actions column, select from the drop down:

- ▶ Email Schedule
- ▶ Email Certificate of Currency

Enter the nominated Email Address, click SUBMIT or CANCEL

A screenshot showing a 'POLICIES LIST' table and two pop-up windows. The table has columns: Policy No., Insured Name, Policy Type, Policy Inception Date, Expiry Date, Created By, Details, and Actions. A row is highlighted with Policy No. 0044067, Insured Name Ins Test, Policy Type PLUS (P/I), Policy Inception Date 01/06/2023, Expiry Date 01/06/2024, and Details Current Unpaid. The Actions column has a dropdown menu with options: Please select, Please select, Email Schedule, and Email Certificate of Currency. Below the table, there are two pop-up windows. The first is 'EMAIL DOCUMENT' with a message 'Please enter the recipient's email address and click submit.' and an input field for 'Email address'. The second is 'EMAIL SENT' with the message 'Email has been successfully sent' and an 'OK' button.