

# How to submit a Referral

## Laserbeam

When processing a quote or endorsement and a referral generates, please proceed with the below steps:

- When a referral needs to be reviewed, a banner will pop up to alert the user to remember to submit the referral like so:

The banner displays the following information:

- Quote** (BRO-537274 - Test 4)
- Total Area**: [Empty field]
- Total Sum Insured**: [Empty field]
- Total Base Premium**: \$0.00
- Policy Locked**: No
- Message**: Unsubmitted Referrals Exist. Please remember to visit the referrals tab on completion of your quote to submit the referrals for review.

- After you have processed the quote/endorsement, please then go to the **"Referral"** tab.

The navigation tabs are: Policy, Client, Disclosure, Farm, Cover, Fields & Crops, Premium, Documents, **Referral**, Conditions.

- For **New Business** or **New Season Quotation** Referrals:

- Make any additional notes by clicking **"Edit"** upon the relevant referral and leaving a **"Broker Comment"**, if applicable:

The form contains the following fields:

- Referral Date**: 11 Apr 2023
- Type**: System
- Generated By**: Sophie Baker
- Submitted**: No
- Submitted Date**: [Empty field]
- Referral Text**: Due to Rural Affinity underwriting requirements
- Accepted**: No
- Accepted Date**: [Empty field]
- Accepted By**: [Empty field]
- Denied**: No
- Denied Date**: [Empty field]
- Denied By**: [Empty field]
- Broker Comment**: High value reflects species xyz of this crop type
- Underwriter Comment**: [Empty field]

Buttons: Add Another, Save & Close.

- Save and close.
- Click **"Submit Referrals"**.

The Referrals table shows the following data:

Date	Generated By	Description	Submitted	Submitted Date	Accept	Deny	Date	By
11 Apr 2023	Sophie Baker	Due to Rural Affinity underwriting requirements	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>		

Buttons: Add Special Request, Submit Referrals, Edit.

- We will then review the referral and come back to you.

- For **Endorsement** Referrals, the process is the same as the above; however, a comment is compulsory for our review, e.g. noting what the endorsement is for *"Endorsed to process field splits"*.