RURAL AFFINITY
The fresh approach to rural insurance

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:

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

❯ 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:

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

- 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"*.