

Broadacre Quoting – New Season vs. New Business Laserbeam

To provide a historical record for our mutual clients, we request that if the insured has held cover with your brokerage and us in the prior season, that terms are quoted as a **"New Season"** rather than a New Business. This allows for the policy number to remain, and we are able to clearly see and provide historical data for the insured.

When to process as New Season quotation

- > When the insured has held cover with Rural Affinity via your brokerage in the season directly prior.
- > Not 100% sure? You can search your client via the "Renewals Due & New Seasons Due" tab, if the insured held cover with us the season prior their policy will show here, with the option to click "New Season" to begin quoting.

What to do when Laserbeam says "Policy is Locked"?

- > Get in touch with the team and we'll be able to review and advise.
- > The most likely cause for this is due to an ongoing claim for the prior season, we can then manually open the "New Season" quotation for you.

A Home	Policy Renewals Due & New Seasons Due /												
	BRO-5372	24					Search	Recent		No Hide when Docs Sent	Create New Quote		
 Current Quotes 							Email for S	ending Documents		broker@ruralaffinity.com.au			
_	ID	Number	Insured	Product	Туре	Inception	Effective	Expiry	Title				
Current Policies	537253	BRO-537224	WINTER BRO	Broadacre	New Business	31 Mar 2023	31 Mar 2023	31 Mar 2023		Mew Policy is Locked			
Renewals Due 8 New Seasons Due													

How to process a New Season Quotation

> Please refer to page 2 of our instruction sheet linked here.

When to process as New Business quotation

> When the insured is a completely New Business to Rural Affinity and/or they have not held a Broadacre policy in the season directly prior.



Processing a New Business Laserbeam

After logging in (https://Laserbeam.live), please proceed with the following steps:

> From either the "Home" or "Current Quotes" tab, click on the "Create New Quote" button upon the top right corner.



- > Select Broadacre.
- > Please DO NOT "Add New Client" before searching for your client first.
- > Begin typing your insureds name (this does a quick check of the system in case the insured was with us last season).
- > If a New Season Quote pops up for the insured, select Option A New Season.

Create Quote	
Process New Quote	
Select your product	
Products coming soon to Laserbeam	
m Farm Pack 🚯 Small Farm Pack 🥵 Livestock 😻 Viticulture 👰 Forestry 🚳 Fruiting Trees & Vines	
Clent Name Insured	
Test 4 Test 4	
OPTION A: Create a Broadacre New Season Quote	OPTION B: Create a New Business Broadacre Quote
Select the New Season button beside the required policy.	
ID Number Insured Type Inception Effective Expiny	
537253 BRO-537224 WINTER BRO New Business 31 Mar 2023 31 Mar 2023 31 Mar 2023 New Socion	Create New Business Broadacre Quate

- > If not, proceed with Option B Create New Business Quote.
- > If the system does not recognise your client please check the spelling and/or any other versions of the insured name they may use. If no results, click "Add New Client" and follow the prompts.

Create Quote		
Process New Quote		
Select your product		
Products coming scon to Laserbeam m Farm Pack Farm Pack Iteration Iteration <td< td=""><td>Forestry Struiting Trees 8 Vines</td><td></td></td<>	Forestry Struiting Trees 8 Vines	
Client Name Select a Client Enter Name or ABN	Insured	Add New Client

- > You will then be taken into the quote for your client.
- > Follow the tabs in order to complete your quotation, remembering to review and update the "Disclosure" tab.

To review a step by step run through, please click here.