

Generating an ATC Letter and Broadacre New Season Application

Laserbeam

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

- Click “New Seasons Due” on the left side.
- Click “Search” and the first 100 New Season policies will appear. If required use the search bar to search for specific policies.

Policy Renewals Due & New Seasons Due/

Enter Policy Number or Client Name

- The Email for Sending Documents will default to your broker email, as per your login – to change please type over with the required email address.

Email for Sending Documents

- Click “Send Docs” beside each policy in the list and the applicable ATC Letter and Broadacre New Season Application will be sent through to your email.

ID	Number	Insured	Product	Type	Inception	Effective	Expiry	Title
510538	BRO-510538	Test 4	Broadacre	New Business	17 May 2021	17 May 2021	30 June 2021	<input type="button" value="View"/> <input type="button" value="New Season"/> <input type="button" value="Send Docs"/>

Helpful Hints

➤ Hide Policies with Sent Documents

Once you have hit “Send Docs”, the button will change to “Re-Send Docs” with a comment underneath stating, “Previously Sent”.

To hide these policies and only show those you have yet to send docs for, please click the “Hide when Docs Sent” toggle, then click “Search”.

Previously Sent

No Yes
 Hide when Docs Sent Hide when Docs Sent

➤ Re-Send Documents

Simply click on the “Re-Send Docs” button beside the policy required.

ID	Number	Insured	Product	Type	Inception	Effective	Expiry	Title
510531	BRO-510531	Test 4	Broadacre	New Business	01 Oct 2020	01 Oct 2020	30 June 2021	<input type="button" value="View"/> <input type="button" value="New Season"/> <input type="button" value="Re-send Docs"/> <small>Previously Sent</small>

Generating a New Season Policy

Laserbeam

Creating a New Season Quote

Option A – Directly from the ATC & Broadacre New Season documents email.

- Use the link in the email. This will take you to the New Seasons Due search, with the selected New Season policy already shown.
NOTE you may be prompted to log in if you are not already signed in.
- Then click the “New Season” button beside the policy. This will create and open the quotation ready for you to enter the new season details.

Please see attached documents for **Test 4**

Attached documents are
- Broadacre ATC Letter
- Broadacre New Season Application

To open or process the policy, please click here: [BRO-510531](#)

ID	Number	Insured	Product	Type	Inception	Effective	Expiry	Title	
510538	BRO-510538	Test 4	Broadacre	New Business	17 May 2021	17 May 2021	30 June 2021		View New Season Send Docs

Option B – Manually Search for New Season Policies.

- Log into Laserbeam as normal (<https://laserbeam.live>)
- Click “New Seasons Due” on the left side.
- Click “Search” and the first 100 New Season policies will appear. If required use the search bar to search for specific policies.
- Then click the “New Season” button beside the policy. This will create and open the quotation ready for you to enter the New Season details.

Helpful Hints

Finding New Season Quotes at a later stage

All New Season quotes created can be found in the “Current Quotes” section (see menu on the left-hand side). Simply search by the client name or policy number. You can then open or view the details by using the buttons on the right-hand side beside each policy.

Getting a copy of ATC Letter & Broadacre

New Season Application documents when in a New Season quote.

Documents can be found in the “Documents” tab once you have opened the New Season quote. Select the required document and click “Send Email”.

Policy
Client
Disclosure
Form
Cover
Fields & Crops
Premium
Documents
Referral

Documents

Select the documents to be included with your email...

- Broadacre Quote
- Broadacre ATC Letter
- Broadacre New Season Application