

Wrightway Van Plan ComQuote MTA User Guide



This document is meant as a general guide for ComQuote users in relation to the Wrightway Van Plan product. Details are subject to change so please contact Wrightway if you have any queries

New Business

When a risk is placed on cover the following occurs:

- 1) The risk details will be greyed-out and they cannot be edited unless an MTA is performed
- 2) An MTA button will appear at the top left hand corner of the screen

The screenshot shows the 'Comquote - Wrightway' application window. At the top, there's a menu bar with 'File', 'Help', and 'MTA'. Below the menu, a status bar displays 'Renewal Date: 29/09/2015', 'Pol No:', 'Premium: 529.86', and 'User: WRIGHTWAY'. The main area is divided into several sections:

- Left Panel:** Contains a 'Currently In' dropdown menu with options like 'Permanent', 'Temporary', 'Cancellation', 'Show History', and 'Remove Full Cycle'. Below this are fields for 'Inception', 'Quote Ref', 'Created', 'Proposer', 'Trading Name', 'Years in Business', 'Vehicle', 'Registration No', 'Value (€)', 'Annual Miles', and 'Principal area of use'.
- Drivers Details:** A table with columns for 'Main Driver', 'Driver 1', 'Driver 2', 'Driver 3', 'Driver 4', and 'Driver 5'. The 'Main Driver' section includes fields for Title, Forename, Surname, Sex, Dob, Married?, and Occupation.
- Extra Proposer / Risk Information:** Includes fields for 'Private Car NCD', 'Named on Private Car', 'Second Van NCD', 'Named on Com. Vehicle', and 'Any non motor policies?'. There's also a section for 'Address and contact details' with fields for Address 1 through 4.
- Bottom Panel:** A table with columns for 'Company Name', 'TP', 'TPFT', and 'Comp'.

At the bottom of the window, there are buttons for 'Calculate', 'Reset', 'Letter', 'Save', 'Exit', 'Result', 'Risk', and 'Load'.

Permanent MTA's

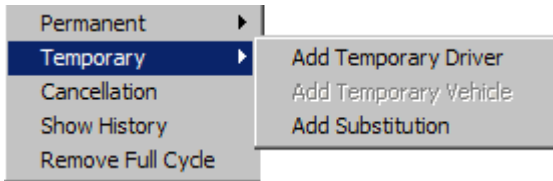
The screenshot shows the 'MTA' dropdown menu. The 'Permanent' option is selected, and a sub-menu is open showing the following options:

- Permanent > General Adjustment
- Temporary > Duplicate Certificate
- Cancellation
- Show History
- Remove Full Cycle

Permanent >> General Adjustments:

- ✓ Permanent Substitution
- ✓ Permanent Add / Delete Driver
- ✓ (Wrightway will continue to process any permanent change of drivers on Open Driving policies)
- ✓ Change of Address
- ✓ Change of Occupation
- ✓ Duplicate Certificate

Temporary MTA's



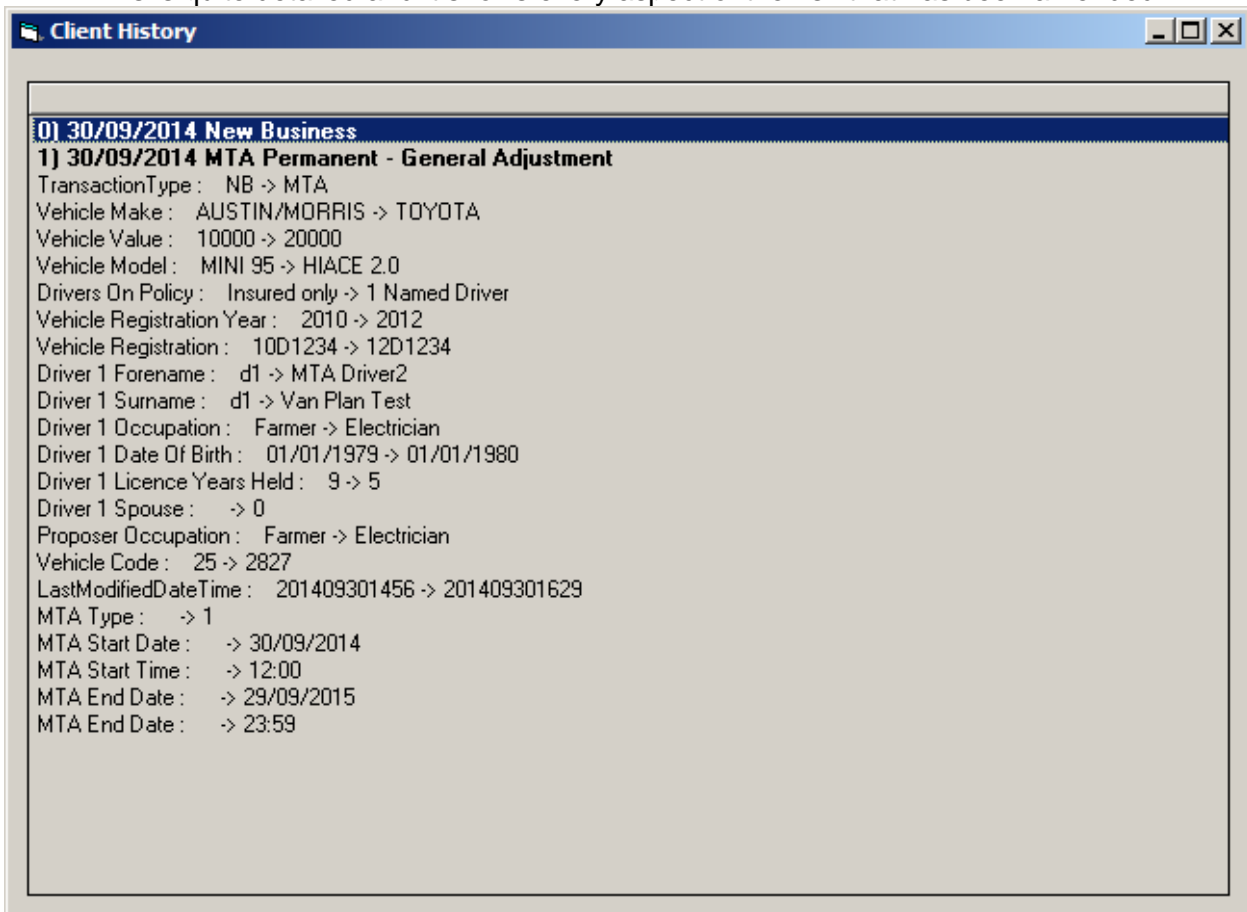
- ✓ Temporary Add Driver
- ✓ Temporary Substitution

Cancellation

For the moment Wrightway will continue to process any cancellations but this function will be switched on at a later date

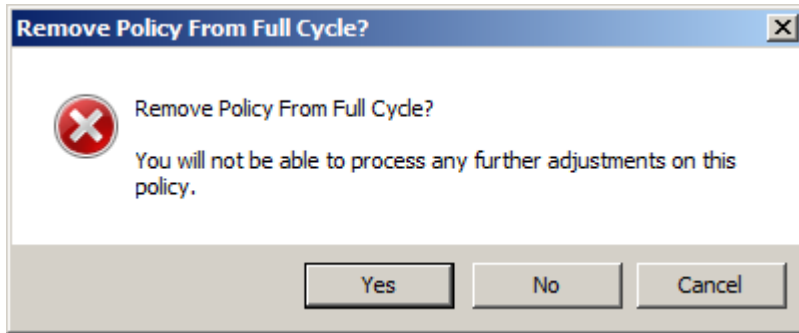
Show History

This will provide a record of the risk history from New Business right through to the most recent MTA. This is quite detailed and it shows every aspect of the risk that has been amended



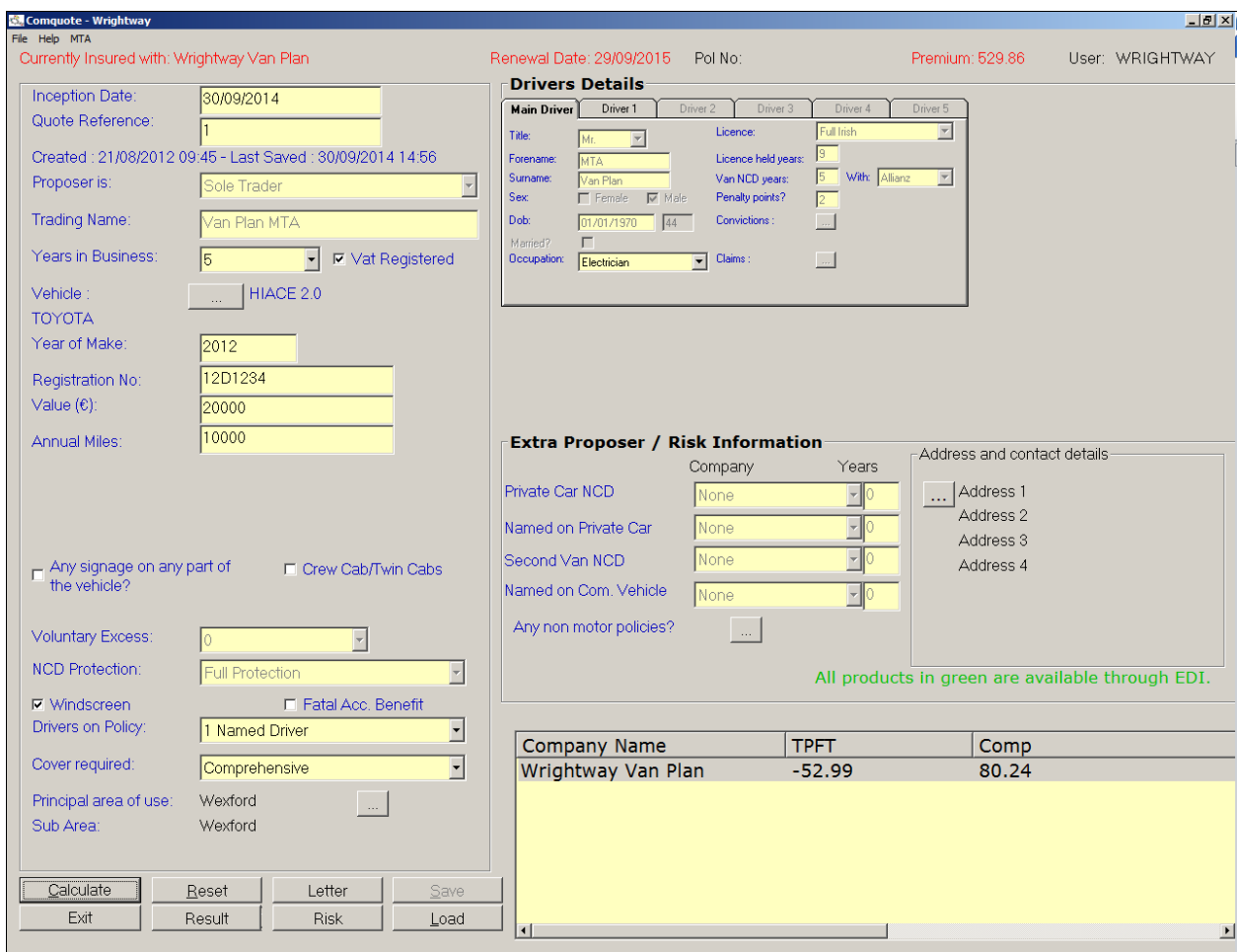
Remove Full Cycle

If necessary the risk may be removed from Full Cycle using the 'Remove Full Cycle' function. Policies should only be removed from full cycle if it is deemed necessary by Wrightway



Processing an MTA

To process an MTA you simply select the type of alteration from the MTA menu and complete the risk details as you would do for a new business quote. Then click on 'Calculate' to get the additional / return premium due.



Drivers Details

Main Driver	Driver 1	Driver 2	Driver 3	Driver 4	Driver 5
Title: Mr.					
Forename: MTA					
Surname: Van Plan					
Sex: <input type="checkbox"/> Female <input checked="" type="checkbox"/> Male					
DOB: 01/01/1970					
Occupation: Electrician					
Licence: Full Irish					
Licence held years: 8					
Van NCD years: 5					
Penalty points: 2					
Convictions:					
Wth: Allianz					
Claims:					

Extra Proposer / Risk Information

	Company	Years
Private Car NCD	None	0
Named on Private Car	None	0
Second Van NCD	None	0
Named on Com. Vehicle	None	0

Any non motor policies? ...

Address and contact details

- Address 1
- Address 2
- Address 3
- Address 4

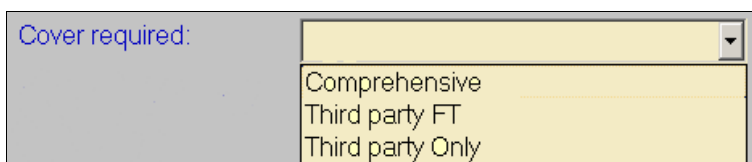
All products in green are available through EDI.

Company Name	TPFT	Comp
Wrightway Van Plan	-52.99	80.24

Buttons: Calculate, Reset, Letter, Save, Exit, Result, Risk, Load

Cover

ComQuote will continue to display quotes for both TPF&T and Comp cover, however the MTA will be processed based on the level of cover that has been selected in the 'Cover required' field. Please note that cover can only be changed if there is a permanent change of vehicle, otherwise cover will remain as it was prior to the MTA.



Double click on the quotation to continue processing the MTA. The following screen will appear...

Original Risk & Current Risk

From here you can access the premiums for the Original Risk (the risk prior to the permanent MTA) & Current Risk (the risk after the permanent MTA). These premiums are the basis for calculating the additional / return premium due.

Submit Risk

Click on 'Submit Risk' to continue processing the MTA. On the next screen you will see a 'Perform MTA' button instead of the 'Buy Cover' option that is displayed for new business. The 'Perform MTA' button follows the same process as the 'Buy Cover' button – i.e. it places the risk on cover & allows you to print / download the relevant documents (cert/disc/schedule).

When you click on 'Finish' you will be returned to the risk details / quote screen which will display details of the current permanent policy.

This document is meant as a general guide for ComQuote users in relation to the Wrightway Van Plan product. Details are subject to change so please contact Wrightway if you have any queries