

Steps to Renew an autoplan insurance
DL#
DOB
Picture ID
First Name
Last Name
Confirm Phone Number
Confirm the E-mail ID
Confirm the mailing address
Open the contact File
Go to pending Policies
Confirm Plate no
Vehicle type/ make / year and model
Confirm the Rate class:
Pleasure use 001
Vehicle driven to work in excess of 15 kms (002)
Vehicle driven to work within 15 kms (003)
Vehicle driven partially to work and then use public transportation (004)
Vehicle used for business use (007)
Vehicles weighs less than 5,000 gkw for delivery use (013)
Confirm the location address
Confirm Drivers, / Add or Remove drivers from the insurance
Principal operator Confirmed
Coverages confirmed:
Check unlisted driver protection option
Third party liability
Collision with deductible
Hit and run
Comprehensive
Special peril
Roadstar package
Loss in use
Roadside package
TNS for uber and lyft
Check the odometer and ask for the picture so that if they are eligible for discount for car driven less than 1
Explain them about the ICBC new product income top-up with people having income over \$100000 in a fir
Give agents comments
Review the policy with client again
Lastly, Bind the policy
Print and Send to Client by Email
Add info to ICBC Sheet