Edit a Property Submission

In Brief

In PolicyCenter after quoting, but before binding, or issuing a policy, you can edit the Policy Transaction.

In this Quick Card, you will edit a quoted Property submission for a potential policyholder. After quoting, something comes up and the policyholder must call you back. After 30 minutes, she calls back and wants to make additional edits to the submission. You will edit the Policy Transaction and re-quote the policy.

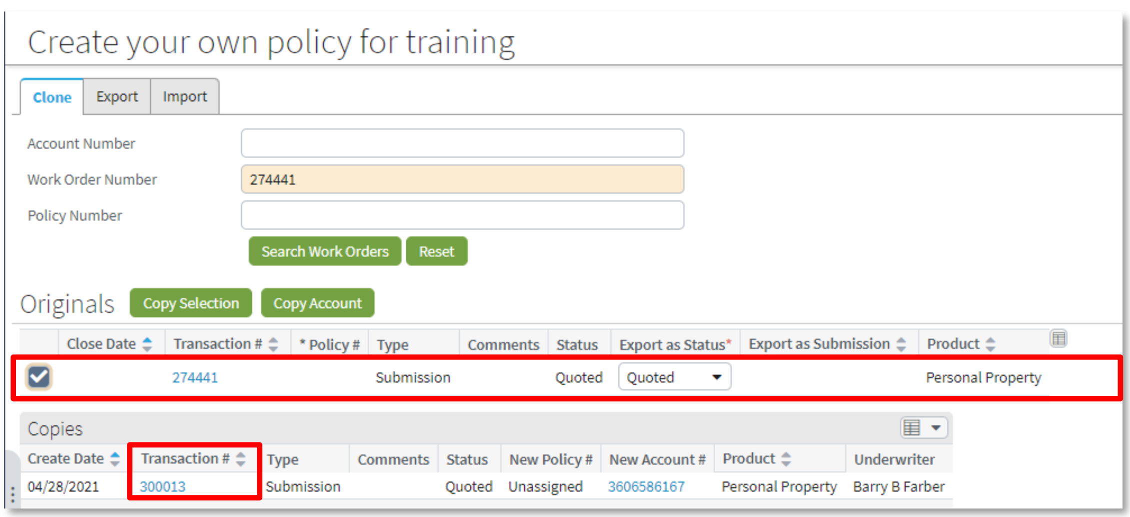
Log in to the VTO using the appropriate generic user account from the **VTO Information Guide** document.

Quick Card

IMPORTANT: This is a test environment. The next seven (7) steps are ONLY used in the VTO.

Clone the Policy

1. Click the down arrow to the right of the **Training** button on the **Tab Bar**. Select "**Create your own policy for training**" from the drop-down list.
2. Enter "274441" in the **Work Order Number** field exactly as it is shown, including spaces and capital letters.
3. Click the **Search Work Orders** button.
4. In the *Originals* section, click the checkbox to the left of the **Submission** Transaction Type for the policy being cloned. In this example, select the checkbox to the left of Transaction #300013.



5. Click the **Copy Selection** button.

Note: If the *Copies* section does not automatically populate, click on the **Search** tab, then back on the **Training** tab. The clone information should be visible.

6. On the *Create your own policy for training* screen, scroll down, if necessary, to the *Copies* section.
7. Click the link in the **Transaction #** column under the *Copies* section.

IMPORTANT: PolicyCenter automatically created a **New Account #**. The new account is linked to the *cloned* policy, not the original.

Quote screen

8. Click the **Edit** button.
9. Click the **OK** button.

Coverages screen

10. Select "**2,500**" from the **Wind & Hail** drop-down list.
11. Select the checkbox to the left of the **Water Backup Limited** field.
12. Select "**10,000**" from the drop-down list for the **Limit**.
13. Under the *Unscheduled Personal Property* section, select the checkbox to the left of **Protection Boost**.
14. Click the **Quote** button.

Quote screen

After quoting, the policyholder has decided she needs to think about it more and will call back soon with a decision.