Add Customer Prefill - Auto

PolicyCenter

Description

This job aid reviews how to pull in the populated information on the “Customer Prefill Information” screen for Auto policies. The information has been populated based on a back-end system. This job aid begins on the “Policy Info” screen of a new Auto submission. If a Driver or Vehicle information is selected, it will be populated on the applicable screens. Powersports policies do not use the PolicyCenter prefill function.

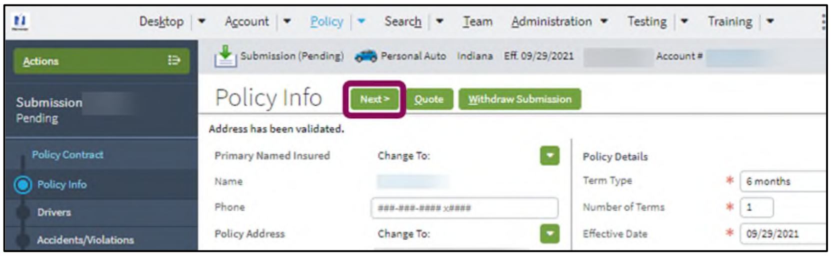
Step 1

Action

On the “Policy Info” screen:

- Select the “Next” button.

Screen



Step 2

Action

On the “Customer Prefill Information” screen:

- Select the checkboxes for the appropriate Driver and Vehicle information.
- Select the “Update” button.

Important Note: You do not have to select Customer Prefill Information. You can select the “Cancel” button and go directly to the “Drivers” screen to enter information manually.

Screen