Purpose

When you need to create a general liability quote in ClearQuote℠.

Procedure

Please reference the VTO User Guide for more details on how to log in and use the VTO.

You can log in to Agent Center Workspace using the following link:
https://agentcentertraining.nationwide.com/WorkspaceAC/home/index

For this scenario, you can create a general liability quote in one of two ways:
- Set up an account, then add General Liability (GL) from the Product Selection screen in ClearQuote℠.
  If creating an account from scratch, this process begins on the GL Information screen, below.
    - **(Please refer to: Set-Up an Account in ClearQuote℠ scenario card)**
- You can select and search from the list of accounts below, that have already been set up

Practice Accounts			
1.	3501662877	16.	3501662895
2.	3501662878	17.	3501662893
3.	3501662879	18.	3501662894
4.	3501662880	19.	3501662896
5.	3501662882	20.	3501662897
6.	3501662883	21.	3501662881
7.	3501662884	22.	3501662898
8.	3501662885	23.	3501662899
9.	3501662886	24.	3501662900
10.	3501662889	25.	3501662901
11.	3501662888	26.	3501662903
12.	3501662887	27.	3501662902
13.	3501662890	28.	3501662904
14.	3501662892	29.	3501662905
15.	3501662891	30.	3501662907

Scenario Card

If searching from the above list of accounts, navigate to the account in Agent Center Workspace. To navigate to the account, complete the following:
1. Click **Get a Quote**
2. Under Commercial, click **Retrieve**
3. Enter the account number in the **Comml/Farm Account Number** field
4. Click **Filter**
5. Click the blue hyperlinked account number within the Quoted Accounts tab. This launches ClearQuote℠

ClearQuote℠ Account Setup

6. Click **Next** to advance past the Account Information screen.
7. Review and complete the **Account Questions**.
    a. Is the applicant's total annual payroll less than $500,000? Select **Yes**
    b. Does the applicant own less than $1,500,000 in combined Building and Business Personal Property values? Select **Yes**
    c. Does the applicant own fewer that 5 vehicles (not including trailers)? Select **No**
    d. Has any policy been cancelled or non-renewed for loss history, non-compliance with policy conditions, ineligible, non-compliance with loss control, or material misrepresentation within the past three years? Select **No**
    e. Has there been a lapse in coverage for more than 30 days in the past 3 years? Select **No**
    f. How many years has the applicant had General Liability coverage with a prior carrier(s)? **2 Years**
    g. Year Business Started: **2007**
    h. GL- Has the applicant had any prior losses? **No**
8. Click **Next**.

GL Information Screen

11. Complete and verify all fields in the Detailed Information section. Many pre-fill.
12. Click the **Add Exposures** button, in the Locations & Exposures section.
13. Select the address from the Location drop-down
14. Enter a **classification code** or **description** in the search field. The system provides a Suggested Classification, which you can use if correct.
15. Click the **Add Class** button beside the classification.
16. Enter the **Exposure Basis**. Answer any underwriting questions specific to the class code, if applicable.
17. Click **Next**
18. Add any coverages, exclusions or additional insureds for the location, if applicable.
19. Click **Save Exposures**
20. Click **Next**
21. Within the Policywide Coverages tab, expand the Cyber Coverage section and select the **Industry Type** from the drop-down. Select Mercantile Service Contractors for this example.
22. Enter the **Number of Employees**.
23. Answer any Underwriting Questions that are generated.
24. Click **Proceed to Review & Quote**

Review & Quote Screen

25. Click the **Quote** button.
26. Click the **Proceed to Issue** button.
27. Enter the **Producer Code** in the pop-up window. Select **TRENT RAPPUHN** from the drop-down.
28. Click **OK**.
    a. This is where you'll launch into PolicyCenter.

PolicyCenter

29. Click **Proceed to Issue**
30. Click the **Agent Signature** check box.
31. Select **Mail Check** from the **Down Payment Method** drop-down.
    a. You must select Mail Check in the VTO.

32. Click **Issue Policies** button.
33. Click **OK** that you are sure you want to bind and issue the policy.