Add, Replace, and Remove a PowerSports Boat

In Brief

In this Quick Card, a policyholder purchased a new boat, traded a boat for a different one, and got rid of a boat. She would like to add the new boat and the traded boat to her existing Auto policy, and remove a RV she no longer owns.
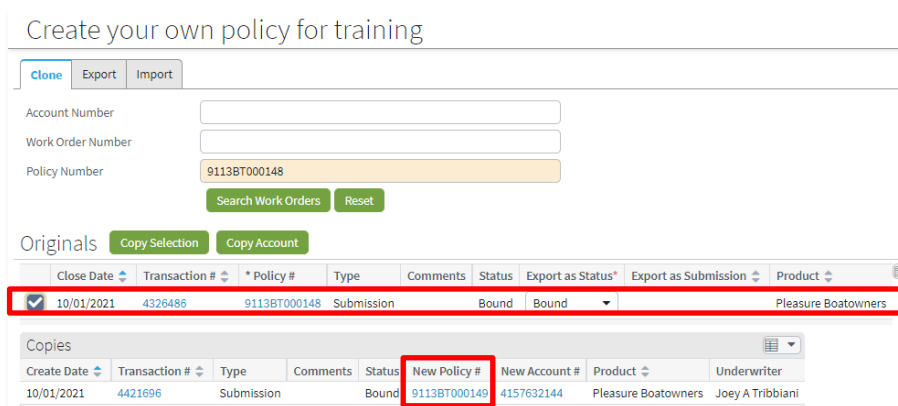
Log in to the VTO using the appropriate generic user account from the **VTO Quick Start Guide** document.

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 menu.
2. Enter "**9113BT000148**" in the **Policy 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 #**4326486**.

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. Scroll down, if necessary, to the *Copies* section.
7. Click the link in the **New Policy #** column.

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

Add, Replace, and Remove a Boat

Summary screen

8. Click the **Actions** button.
9. Select "**Change Policy**" from the drop-down menu.

Start Policy Change screen

10. PolicyCenter defaults the **Effective Date** to the current system date. If necessary, you can change the date to a future date. In this example, accept the current date.
11. Click the **Next >** button.

Policy Info screen

12. Click the **Vehicles** link.

Vehicles screen

13. Review the vehicle listed on the **Vehicle Details** tab.
14. Click the **Create Vehicle** button.
15. In the *Basic Vehicle Information* section:
    - Enter "**CYVSY007B606**" in the **VIN** field.
    - Enter "**2015**" in the **Year** field.
    - Select "**Columbia Yacht**" from the **Make** drop-down list.
    - Select "**Carbon 32**" from the **Model** drop-down list.
    - Enter "**20**" in the **Top Speed** field.
    - Click the radio button to the left of **No** for *"Do you have a trailer?"*.
    - Enter "**104000**" in the **Market Value** field.

16. Review the vehicles listed in the *Vehicle Details* section.
17. Select the checkbox to the left of **2012 AB Inflatables**.
18. Click the **Replace Vehicle** button.

19. In the *Basic Vehicle Information* section:
    - Enter "**AUL27159D484**" in the **VIN** field.
    - Enter "**2013**" in the **Year** field.
    - Select "**Achilles Inflatable Craft**" from the **Make** drop-down list.
    - Select "**FRB 104**" from the **Model** drop-down list.
    - Enter "**25**" in the **Top Speed** field.
    - Click the radio button to the left of **No** for *"Do you have a trailer?"*.
    - Click the radio button to the left of No for *"Is this vehicle co-owned by anyone outside the household?"*.
    - Enter "**2000**" in the **Market Value** field.

20. Select the checkbox to the left of the **2013 Achilles Inflatable Craft**.
21. Click the **Remove Vehicle** button.
22. Review the remaining vehicles listed in the *Vehicle Details* section.
23. Click the **Coverages** link

Coverages screen

24. Click the **Clear** button to acknowledge any Validation Results displayed.
25. In the *Vehicle Level Coverages* section, ensure the correct coverages are selected.
26. Make any desired updates to the coverages as needed.
27. Click the **Policy Review** link.

IMPORTANT: This is a test environment. This data is not valid. The VTO is not connected to the rating system, but in production, you will see the correct premium.

28. Click the **Policy Review** link.

Policy Review screen

29. Review the changes to the policy.
30. Click the **Quote** button.
31. Click the **Issue Change** button.
32. Click the **OK** button.

Policy Change Bound screen

PolicyCenter displays the message, "*Your Policy Change (#XXXX) has been bound.*"