# Documents Generated:

Copy a previous quote: This general for all quotes.

Graphical user interface, text, application, email

Description automatically generated

Documents generated:

Quote Letter and Supplemental application

Graphical user interface, application, table

Description automatically generated



Graphical user interface, application

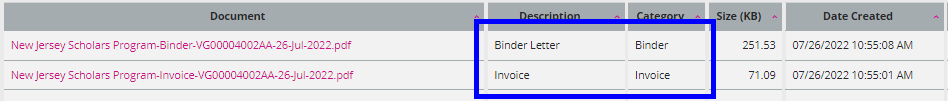
Description automatically generated

Now, let’s bind the policy

It generates a new policy number, new documents (binder letter, invoice) and LES reports

Graphical user interface, text

Description automatically generated

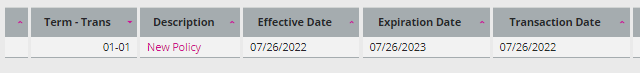


Graphical user interface

Description automatically generated with medium confidence

Now, let’s issue the policy

History:



Documents:

Table

Description automatically generated

LES: No new entry.

**Revised Policy:**

You must use the policy Effective Date.

VG00004002AA

Initial documents Supplemental Application, Quote Letter, Binder Letter, Invoice, Policy Declaration.

Graphical user interface, application

Description automatically generated

Click on amend icon and select Revised Policy and then click on Continue.

Graphical user interface, application

Description automatically generated

In this example, I changed the Quote Options from $1200 to $1320

Graphical user interface

Description automatically generated

Graphical user interface, application

Description automatically generated

Graphical user interface, text, application

Description automatically generated

History:

Graphical user interface, text, application

Description automatically generated

Graphical user interface, text

Description automatically generated

Documents:

This generates a Binder Letter, Invoice and Policy Declaration

Graphical user interface

Description automatically generated

The invoice shows the full premium

Text

Description automatically generated with medium confidence

LES:

Table

Description automatically generated

Table

Description automatically generated

Revised Binder:

Status: Bound

Graphical user interface

Description automatically generated

History:



Documents:

Graphical user interface

Description automatically generated

LES:

Graphical user interface

Description automatically generated with medium confidence

Let’s amend the quote and perform a revised binder… No change in the date. In this example only will change the premium in Quote Options.

Graphical user interface

Description automatically generated

A picture containing graphical user interface

Description automatically generated

Graphical user interface, application

Description automatically generated

This will show the difference in the UI

Text

Description automatically generated with medium confidence

Save and Exit

History:

Graphical user interface, application

Description automatically generated

Documents:

Generated two new documents (Binder Letter and Invoice)

Table

Description automatically generated with medium confidence

LES:

This creates an Error Correction and a New Business

Graphical user interface

Description automatically generated with low confidence

Calendar

Description automatically generated

In the invoice, it shows the entire premium after the revised binder is done.

Graphical user interface, text

Description automatically generated

**MTA:**

I need to specify since when the change will take place. It can be the same effective date or different.

If you need to add/delete an endorsement you **must** use an MTA.

Graphical user interface

Description automatically generated

Initial History:

Graphical user interface, application

Description automatically generated

Initial Documents:

Table

Description automatically generated

MTA:

In this example I will add an endorsement and change the expiration date.

Graphical user interface, text, application

Description automatically generated

Graphical user interface, application

Description automatically generated

Graphical user interface, text, application

Description automatically generated

Graphical user interface, text, application, email

Description automatically generated

Text

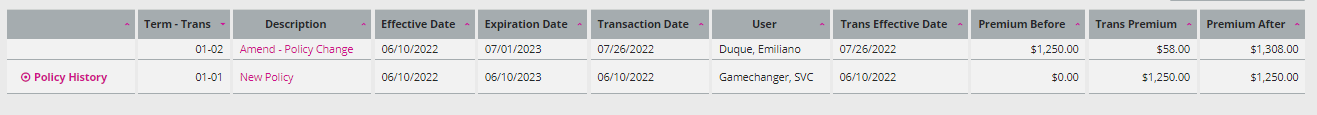
Description automatically generated

Graphical user interface, text, application, email

Description automatically generated

Save and Exit

New History:



Graphical user interface, application

Description automatically generated

New Documents: Invoice and Policy Declaration

Table

Description automatically generated

LES:

In this case it had BMT + GL so you can see two New business and Two Error corrections, and then you will see the Additional Premium.

Table

Description automatically generated

Calendar

Description automatically generated

When you do an MTA the invoice will show only the difference in the premium

Graphical user interface, text

Description automatically generated