

Policy - Convert Quote to a Policy

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Overview:

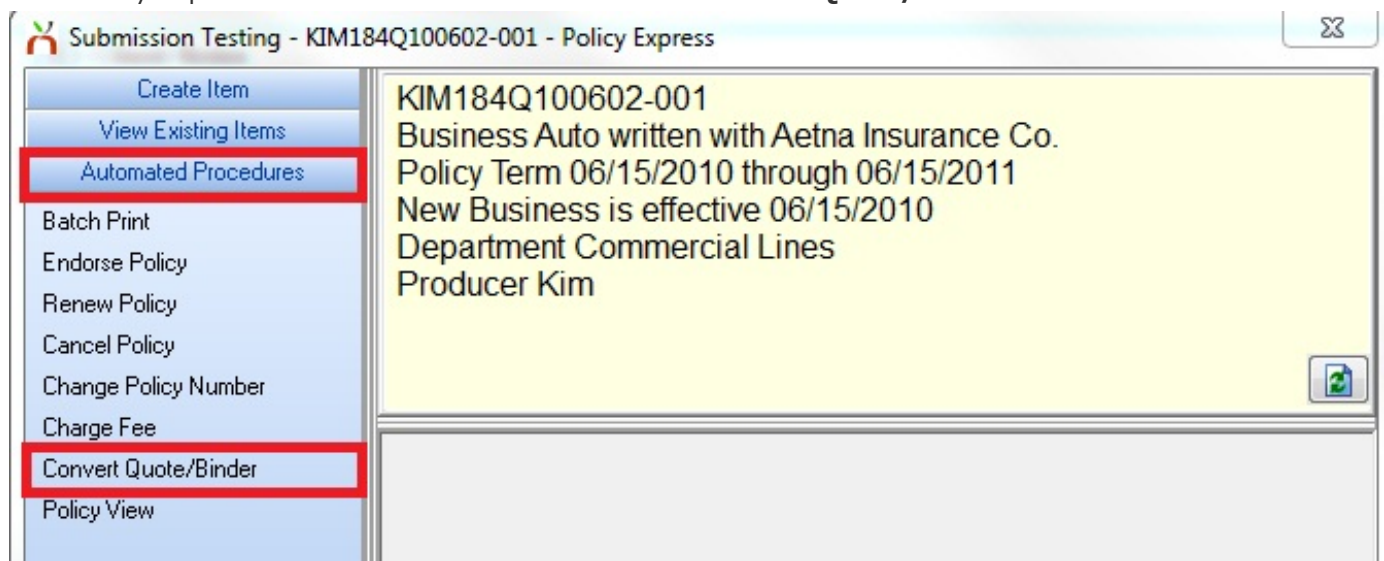
Policy Express has simplified the process of converting a Quote to a Policy using an Automated Procedure.

Before You Begin:

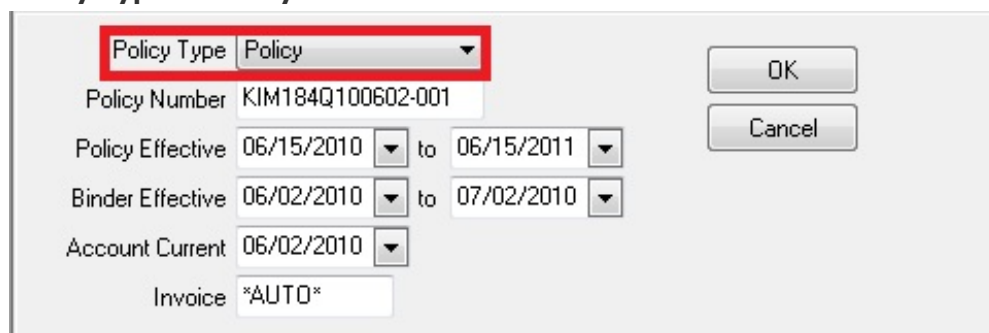
A Quote must be created on the client and listed on the basic tab. See [How to Create a Policy](#) for more information.

Process:

1. Select the **Quote Number** (in green) under **Active Policies** on one of the four **Client tabs**.
2. From Policy Express select **Automated Procedures** -> **Convert Quote/Binder**.



3. **Policy Type** -> **Policy** will be selected

A screenshot of the "Convert Quote/Binder" dialog box. The "Policy Type" dropdown is set to "Policy" and is highlighted with a red box. Other fields include: "Policy Number" (KIM184Q100602-001), "Policy Effective" (06/15/2010) to "06/15/2011", "Binder Effective" (06/02/2010) to "07/02/2010", "Account Current" (06/02/2010), and "Invoice" (*AUTO*). There are "OK" and "Cancel" buttons on the right.

4. Change the **Policy Number** if needed.
5. Confirm/Change the **Policy Effective** and **Expiration** dates.
6. Account Current will default to the current date. *(If the Quote was invoiced, the converted policy will automatically be Invoiced and posted to the General Ledger as of this date).*
7. The **Invoice Number** will be auto-assigned unless otherwise specified.
8. Click **OK**. The system will display **Process Completed**.

Notes:

All Forms/Notes/Attachments/Activities that were on the Quote, still exist on the Policy. You can select View Existing Items to confirm/change information as needed.

Tagged under [Policy Express](#)

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