

# Creating a Quick Quote

## Non-Trucking Liability and Physical Damage

### General Information

Click on the link to access Great Roadmap: [gaigtrucking.cloudinsurer.com](https://gaigtrucking.cloudinsurer.com)

Follow these instructions to create a Quick Quote. Once a Quick Quote has been created and the premium calculated, you can then create a Full Quote and Issue.

### Login Page

1. Log into Great Roadmap using your GAIG username and password.
2. On the Create New Quote tile, select **Non Trucking Liability and Physical Damage** from the drop down-menu.
3. Click **Let's Begin**.

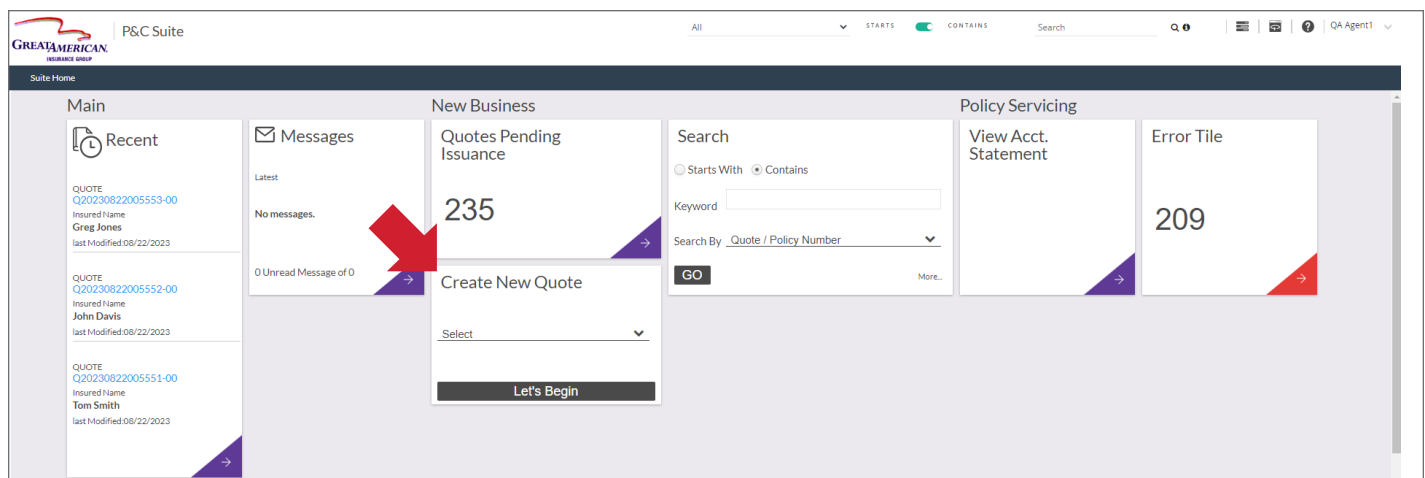


Figure 1. Home screen.

## Quote Screen

1. Click on the search icon and select the **Term of Insurance** from the pop-up menu.
2. Enter the **Effective Date**.

**NOTE:** Required fields are indicated by a red bar.

3. Select the **Type of Business** and enter the insured's information. This defaults to Individual.

The screenshot shows the 'P&C Suite' interface. At the top, there's a navigation bar with 'All', 'STARTS', and 'CONTAINS' filters, and a search bar. Below this, a 'Suite Home' section shows 'New Insured' and 'QUOTE: Quote REVISION: 000 VIEW: Quick'. A status box on the right indicates 'In Progress' with a '\$0.00' premium. The main form is titled 'Quote' and has a sidebar with 'Coverages', 'Optional Coverages', 'Vehicle Information', 'Drivers', and 'Premium Summary'. The 'Insured Information' section contains fields for 'Producer Code', 'Producer Name', 'Type of Business' (set to 'Individual'), 'First Name', 'Middle Initial', 'Last Name', 'Suffix', 'Doing Business As', 'Address', 'City', 'State', and 'Zip'. Red arrows highlight the search icons for 'Producer Code', 'Type of Business', 'Suffix', and 'Zip', and a large red arrow points to the 'NEXT' button at the bottom right.

Figure 2. Insured Information.

**NOTE:** If you enter the zip code first, the city and state will auto-populate.

4. For **Garage details same as Insured Details?** Do the following:
  - a. If the garage address is the same as the insured's address, select **Yes**.
  - b. Otherwise, select **No** and enter the garage address.

The screenshot shows the 'Garage Address' section. It starts with the question 'Garage details same as Insured Details?' with 'Yes' and 'No' radio buttons. Below this are fields for 'Garage Address', 'City', 'State', and 'Zip'. Red arrows highlight the 'No' radio button and the 'NEXT' button at the bottom right.

Figure 3. Garage Address.

5. When finished, click **NEXT**.

# Coverages

- 1. Select your product(s) **NTL** and/or **PD**. You can choose one or both.
- 2. For NTL and PD Coverages, enter the coverage **Limit** and **Deductible** information as required.

John Doe  
QUOTE: Q20230306000840-00 REVISION: 000 VIEW: Quick

Garage State: Ohio

NTL Coverages

Coverage	Limit	Deductible	Option
Bodily Injury / Property Damage			
Uninsured Motorist			
Uninsured Motorist - PD			
Under Insured Motorist			

PD Coverages

Coverage	Limit	Deductible	Option
Collision	N/A		
Comprehensive	N/A		
Specified Perils	N/A		

© 2023 Majesco. All rights reserved, worldwide

Figure 4. Coverages

- 3. For Rating Information, select the **Primary Commodity Hauled**.
- 4. Select the **Usage**.
- 5. Click **NEXT** when finished.

Rating Information

Primary Commodity Hauled: Boats

Radius of Operation: Long Haul (over 500 miles)

Usage: Other

© 2023 Majesco. All rights reserved, worldwide

Figure 5. Rating Information

## Optional Coverages

1. Select the **TruxPro** and/or **Deductible Buy Back** as needed. If you select Deductible Buy Back, fields for the limits and amount will become available.
  - a. Select **Aggregate Limit Applies** and enter the **Aggregate Limit**.

OR

- b. Enter the **Liability PD Limit**, **Cargo Limit**, or **Trailer PD Limit** individually as needed.
2. Select a **Retained Amount** from the pop-up window.

**NOTE:** For each Limit and Retained Amount, anything over \$10,000 will be referred to an underwriter. Liability PD Limit, Cargo Limit, and Trailer PD Limit are not required. You can also select Aggregate Limit Applies.

**NOTE:** Towing & Storage defaults to \$10,000 and is used for quoting. However, higher limits may be considered by referring to your underwriter.

Great American Insurance Group P&C Suite

John Doe

QUOTE: Q20230306000840-00 REVISION: 000 VIEW: Quick

In Progress \$0.00

Optional Coverages

Q20230306000840-00

Coverages

Optional Coverages

Vehicle Information

Drivers

Premium Summary

☒ TruxPro

☒ Deductible Buy Back

☐ Aggregate Limit Applies

Liability PD Limit \$1,000

Cargo Limit \$1,000

Trailer PD Limit \$1,000

Aggregate Limit \$3,000

Retained Amount

Towing & Storage \$10,000

SAVE & RESUME LATER SAVE & CONTINUE CALCULATE PREMIUM

GO BACK NEXT

© 2023 Majesco. All rights reserved, worldwide

Figure 6. Optional Coverages

3. When finished, click **NEXT**.



## Vehicle Information

1. Click **ADD** to add a vehicle. This will open up a new screen.

John Doe  
QUOTE: Q20230316000867-00 REVISION: 000 VIEW: Quick

Search

Vehicle Information

Q20230316000867-00  
Coverages  
Optional Coverages  
Vehicle Information  
Drivers  
Premium Summary

Vehicle No	Ownership Type	Vehicle Type	Unit #	VIN	Year	Make	Coverage Type	Stated Value	Gross Vehicle Weight	Usage	Motor Carrier Name	Business Type
There is no information to display												

+ ADD COPY EDIT EXPORT IMPORT

Figure 7. Vehicle Information.

2. Enter the required Vehicle Information.
  - a. If you are adding more than one vehicle, you can click **SAVE AND NEW** and continue adding vehicles as needed.

John Doe  
QUOTE: Q20230306000840-00 REVISION: 000 VIEW: Quick

Search

Vehicle Information (2)

Q20230306000840-00  
Coverages  
Optional Coverages  
Vehicle Information (2)  
1 - FREIGHTLINER  
2  
Drivers (1)  
Premium Summary

SAVE AND NEW DELETE

Vehicle No 2  
Ownership Type  
Vehicle Type  
Unit #  
VIN  
Year

SAVE & RESUME LATER SAVE & CONTINUE CALCULATE PREMIUM GO BACK NEXT

Figure 8. Adding a vehicle.

3. When finished, click **NEXT**. The vehicle(s) you added will be listed in a table on the Vehicle Information screen.
4. On the Vehicle Information screen, click **DONE WITH VEHICLE INFORMATION** to begin entering the drivers on the next screen.

## Drivers

1. Click **ADD** to add a driver. This will open up a new screen.

The screenshot shows the 'P&C Suite' interface for 'John Doe'. The top navigation bar includes 'Suite Home', 'Reports', and 'Workbench'. The main header displays 'John Doe' and 'QUOTE: Q20230306000840-00 REVISION: 000 VIEW: Quick'. A status box on the right shows 'In Progress' and a premium of '\$7,498.50'. A left sidebar lists navigation options: 'Coverages', 'Optional Coverages', 'Vehicle Information (2)', '1 - FREIGHTLINER', '2 - CHEVROLET', and 'Drivers (1)'. The 'Drivers (1)' section is expanded, showing '1 - John Doe' and a 'Premium Summary'. A table of drivers is visible with columns: 'Driver No', 'CDL State', 'CDL #', 'First Name', 'Middle Initial', and 'Last Name'. The first row shows '1', 'John', and 'Doe'. A red arrow points to the '+ ADD' button in the top right of the table area. At the bottom, there are buttons for 'SAVE & RESUME LATER', 'SAVE & CONTINUE', 'CALCULATE PREMIUM', 'GO BACK', and 'DONE WITH DRIVERS'.

Figure 9. Adding a driver.

2. Enter the required Driver Information.

- If you are adding more than one driver, you can click **SAVE AND NEW** and continue adding drivers as needed.

The screenshot shows the 'P&C Suite' interface for 'John Doe' with the '1 - John Doe' driver selected. The left sidebar is expanded to '1 - John Doe' and 'Premium Summary'. A red arrow points to the 'SAVE AND NEW' button in the top right of the sidebar. The main area displays a form for 'Driver No' (1), 'First Name' (John), 'Middle Initial' (empty), 'Last Name' (Doe), 'Suffix' (empty), and 'Date of Birth' (01/01/1990). A red arrow points to the 'SAVE AND NEW' button in the top right of the form area. At the bottom, there are buttons for 'SAVE & RESUME LATER', 'SAVE & CONTINUE', 'CALCULATE PREMIUM', 'GO BACK', and 'NEXT'. A red arrow points to the 'NEXT' button.

Figure 10. Adding a vehicle.

3. When finished, click **NEXT**. The driver(s) you added will be listed in a table on the Drivers screen.

4. On the Drivers screen, click **DONE WITH DRIVERS** to go to the next screen.

## Premium Summary

1. On the Premium Summary screen, click **CALCULATE PREMIUM** to see the Premium Summary.

The screenshot shows the 'Premium Summary' screen for John Doe. The quote number is Q20230306000840-00, revision 000, and view is Quick. The status is 'In Progress' and the premium is \$13,684.50. The left sidebar shows a list of items: Coverages, Optional Coverages, Vehicle Information (2), Drivers (1), and Premium Summary (selected). The main content area displays 'Rating Incomplete. Rate the quote/policy to see premium.' with a 'Return to Top' link. At the bottom, there are three buttons: 'SAVE & RESUME LATER', 'SAVE & CONTINUE', and 'CALCULATE PREMIUM'. A red arrow points to the 'CALCULATE PREMIUM' button.

Figure 11. Premium Summary before calculating premium.

2. Once the premium has been calculated, you can choose **General** or **Scheduled Vehicles** from the drop down menu to see a diversification of premium.

The screenshot shows the 'Premium Summary' screen for John Doe, now with a dropdown menu open. The dropdown menu has two options: 'General' (selected) and 'Scheduled Vehicles'. The main content area displays 'Non-Trucking Liability and Physical Damage' under the 'General Information' section. The information includes: Named Insured: John Doe, Effective Date: 03/27/2023, Expiration Date: 03/27/2024, Term of Insurance: Annual, Producer Name: Insurance Agency, and Garaging State: Ohio. At the bottom, there are three buttons: 'SAVE & RESUME LATER', 'SAVE & CONTINUE', and 'CALCULATE PREMIUM'. A red arrow points to the 'General' option in the dropdown menu.

Figure 12. Premium Summary with view and print options.

3. Click **Next** to go to the Dashboard. From there you can convert the Quick Quote into a Full Quote.

# Converting a Quick Quote to a Full Quote


Non-Trucking Liability and Physical Damage

## General Information

Once a Quick Quote has been created, you can convert it to a full quote from the dashboard. To do a Full Quote, you will need to enter billing, vehicle and driver information.

On the dashboard, under Choose Next Action, click **Convert to Full Quote**.

**NOTE:** You have to the option to make changes to the Quick Quote by clicking Edit or Revise. Clicking Edit will allow you to make changes but will not keep a revision history. Clicking Revise will allow you to make changes and the system will create a new quote version. The user can then select which version they want to use to convert to a policy. Inquire will give you the ability to review the quote but not make any changes.

 P&C Suite

AllSTARTSCONTAINS

Search

Agent Insurance

Suite Home

John Doe

QUOTE: Q20230523003203-00 REVISION: 000 VIEW: Quick

Quoted Premium \$552.00	Taxes, Fees, Surcharges \$0.00	Policy Period 05/26/2023 - 05/26/2024	Current Due \$0.00	Open Claims 0	Status Pending Quote
----------------------------	-----------------------------------	--	-----------------------	------------------	-------------------------

Choose Next Action

[Inquire](#)[Convert to Full Quote](#)[Edit](#)[Revise](#)

Applicant Information

Name: John Doe

Address: 301 E Fourth Street GAT-26N Cincinnati, OH 45202

FEIN: Not Available

Phone: Not Available

Producer Information

Code: 0000000010

Name: Test Producer

Address: #144 Test St - Changed Plano, TX 75024

Phone: (123) 456-7890

LifeCycle

Email Activities

UW Rules

Forms

Quote Documents

MILESTONE	REVISION	ACTIVITY	TRANSACTION EFFECTIVE DATE	STARTED ON	LAST MODIFIED	MODIFIED BY	STATUS	TRANSACTION PREMIUM	POLICY PREMIUM	REMARKS	CHANGE SUMMARY
Quote Q20230523003203-00	000	New Business Quote	05/26/2023	05/23/2023 10:21	05/23/2023 10:24	Agent Insurance	Pending Quote	\$552.00	\$0.00		

Release Version 2023 Majesco. All rights reserved, worldwide

Figure 1. Dashboard.

## Billing Information and Coverage Review

1. On the Quote screen, scroll down to the Billing Information section and select a **Billing Option**.

**NOTE:** For Direct Bill, you will need to verify the billing address and make a payment in the system before you can bind and issue the policy. For Agency Bill, the Billing Information fields will auto-populate, and the agent will be responsible for collecting any payment.

The screenshot displays the 'P&C Suite' interface for a quote. At the top, the user is logged in as 'John Doe' with a quote number 'Q20230306000840-00' and a revision of '000'. The status is 'In Progress' with a premium of '\$13,684.50'. The 'Billing Information' section is expanded, showing the following details:

- Billing Option:** Agency Bill
- Payment Plan:** Agency Bill - Full Pay
- Billing Cycle:** Pro-rata
- Deposit Required:** Yes (selected) / No
- Billing Address Details same as Insured Details?:** Yes (selected) / No
- Billing Address:** 6449 Allen Road

At the bottom, there are three buttons: 'SAVE & RESUME LATER', 'SAVE & CONTINUE', and 'CALCULATE PREMIUM'. A 'NEXT' button is located at the bottom right, indicated by a red arrow.

Figure 2. Billing Information.

2. Click **NEXT** when finished entering the billing information to review or change the Coverages screen.
3. When finished, click **NEXT** again to review or change the Optional Coverages screen.
4. When finished, click **NEXT** to go to the Vehicle Information screen.

# Vehicle Information

1. Click the details icon to open the vehicle details screen.

John Doe

QUOTE: Q20230306000840-00 REVISION: 000 VIEW: Full

Vehicle Information (1)

Details	Vehicle No	Ownership Type	Vehicle Type	Unit #	VIN	Year
	1	Owned	Tractor-Conventional		RM12345	2015

SAVE & RESUME LATER SAVE & CONTINUE CALCULATE PREMIUM GO BACK DONE WITH VEHICLE INFORMATION

Figure 3. Vehicle Information

2. On the Vehicle Details screen, enter the VIN.

John Doe

QUOTE: Q20230306000840-00 REVISION: 000 VIEW: Full

1 - FREIGHTLINER

SAVE AND NEW DELETE

Vehicle No: 1

Ownership Type: Owned

Vehicle Type: Tractor-Conventional

Unit #:

VIN: RM12345

Year: 2015

SAVE & RESUME LATER SAVE & CONTINUE CALCULATE PREMIUM GO BACK NEXT

Figure 4. VIN



3. To add any additional interest, do the following:
  - a. Scroll down to the Additional Interest section.
  - b. Click **ADD**.
  - c. Select the **Interest Type** from the pop-up window.
  - d. Enter any required information (name, address, etc.).
  - e. Continue to add any additional interest as needed.

**NOTE:** Additional Insureds will need to be reviewed by an Underwriter.

Figure 5. Additional Interest

4. Click **NEXT** when finished.
5. Continue to add a VIN and any additional interests for each vehicle. When finished, click **DONE WITH VEHICLE INFORMATION**.

## Drivers

1. Click the details icon to open the driver details screen.

Figure 6. Driver screen.

**NOTE:** At this point, an MVR will be pulled on the driver.

- GREAT AMERICANINSURANCE GROUP

P&C Suite

Suite Home

John Doe

QUOTE: Q20230316000867-00 REVISION: 000 VIEW: Full

In Progress\$13,684.50StatusPremium

Search

Q X V

1 - John Doe

Q20230316000867-00

Coverages

Optional Coverages

Vehicle Information (1)

1 - FREIGHTLINER

Drivers (1)

1 - John Doe

Eligibility

Premium Summary

SAVE AND NEWDELETE

Driver No

CDL StateOhio

CDL #AA123351

First NameJohn

Middle Initial

Last NameDoe

Suffix

Date of Birth01/01/1972

Driver License Information

SAVE & RESUME LATER

SAVE & CONTINUE

CALCULATE PREMIUM

GO BACKNEXT

© 2023 Majesco. All rights reserved, worldwide

- Click **NEXT** when finished.
- Continue to add details for each driver. When finished, click **DONE WITH DRIVERS**.

**GREAT AMERICAN** INSURANCE GROUP | P&C Suite

Suite Home ▾ Reports ▾ Workbench ▾

John Doe

QUOTE: Q20230306000840-00 REVISION: 000 VIEW: Full ▾

In Progress \$13,684.50  
Status Premium


Search ▾ 🔍 ⌕ ▾ ➡ Drivers (1)

- Q20230306000840-00
  - Coverages
  - Optional Coverages
  - Vehicle Information (1)
    - 1 - FREIGHTLINER
  - Drivers (1)
    - 1 - John Doe
  - Eligibility
  - Premium Summary

+ ADD ✖ REMOVE 📄 COPY ▾ ⚙ EDIT ⬇ EXPORT ⬆ IMPORT

Details		Driver No	CDL State	CDL #	First Name	Middle Initial
ⓘ	<input type="checkbox"/>	1	Ohio ▾	AA123351	John	

⏮ SAVE & RESUME LATER ✓ SAVE & CONTINUE 🧮 CALCULATE PREMIUM ⬅ GO BACK ➡ DONE WITH DRIVERS





**GREATAMERICAN®**  
INSURANCE GROUP



## Eligibility

1. On the Eligibility screen, select **Yes** or **No** for each of the questions.

Great American Insurance Group

P&C Suite

All

STARTS

CONTAINS

Search

Q

Menu

Print

Help

Agent Insurance

Suite Home

John Doe

QUOTE: Q20230316000867-00

REVISION: 000

VIEW: Full

In Progress

\$13,684.50

Status

Premium

Search

Q

Cancel

Eligibility

Q20230316000867-00

Coverages

Optional Coverages

Vehicle Information (1)

1 - FREIGHTLINER

Drivers (1)

1 - John Doe

Eligibility

Premium Summary

#	Questions	Response
1	Operate under his/her own authority?	<input type="radio"/> Yes <input type="radio"/> No
2	Engage in a long-term lease with an FHWA approved carrier?	<input type="radio"/> Yes <input type="radio"/> No
3	Carry any passengers for hire?	<input type="radio"/> Yes <input type="radio"/> No
4	Use any HOTSPOT or GOOSENECK trailers manufactured before 1988?	<input type="radio"/> Yes <input type="radio"/> No
5	Engage in off-road logging?	<input type="radio"/> Yes <input type="radio"/> No
6	Trip Lease?	<input type="radio"/> Yes <input type="radio"/> No
7	Have any of the following violations in the last 36 months: DUI, DWI, Hit & Run, Fleeing or Eluding Police, Manslaughter or Negligent homicide, any felony conviction, racing, suspended license violation, reckless driving?	<input type="radio"/> Yes <input type="radio"/> No
8	Use any Emergency Vehicles or Wrecked Trucks?	<input type="radio"/> Yes <input type="radio"/> No
9	Uses Glass-Lined, Unspecified Trailers?	<input type="radio"/> Yes <input type="radio"/> No
10	Lease any trucks without Drivers?	<input type="radio"/> Yes <input type="radio"/> No

SAVE & RESUME LATER

SAVE & CONTINUE

CALCULATE PREMIUM

GO BACK

NEXT

© 2023 Majesco. All rights reserved, worldwide

*Figure 9. Eligibility.*

2. When finished, click **NEXT**.

## Premium Summary

1. On the Premium Summary screen, click **CALCULATE PREMIUM** to see the Premium Summary.

The screenshot shows the 'Premium Summary' screen in the P&C Suite. The top navigation bar includes the Great American Insurance Group logo, 'P&C Suite', and filters for 'All', 'STARTS', and 'CONTAINS'. A search bar is on the right. The main header area displays 'John Doe', 'QUOTE: Q20230316000867-00', 'REVISION: 000', and 'VIEW: Full'. A status box on the right shows 'In Progress' and a premium amount of '\$13,684.50'. A left sidebar lists navigation options: 'Coverages', 'Optional Coverages', 'Vehicle Information (1)', '1 - FREIGHTLINER', 'Drivers (1)', '1 - John Doe', 'Eligibility', and 'Premium Summary'. The main content area shows a message: 'Rating Incomplete. Rate the quote/policy to see premium.' with a 'Return to Top' link. At the bottom, there are buttons: 'SAVE & RESUME LATER', 'SAVE & CONTINUE', 'CALCULATE PREMIUM', 'GO BACK', and 'NEXT'. A large red arrow points down to the 'CALCULATE PREMIUM' button.

Figure 10. Premium Summary before calculating premium.

2. Once the premium has been calculated, you can choose **General** or **Scheduled Vehicles** from the drop down menu to see a diversification of premium.

The screenshot shows the 'Premium Summary' screen after calculating the premium. The top navigation bar and header information are the same as in Figure 10. The left sidebar is the same. The main content area now displays 'Non-Trucking Liability and Physical Damage'. A dropdown menu is open, showing 'General' and 'Scheduled Vehicles' options, with a red arrow pointing to it. Below the dropdown, there are two sections: 'General Information' and 'Premium Information'. The 'General Information' section includes: 'Named Insured: John Doe', 'Effective Date: 03/16/2023', 'Expiration Date: 03/16/2024', 'Term of Insurance: Annual', 'Producer Name: Insurance Agency', 'Garaging State: Ohio', and '# of Vehicles: 1'. The 'Premium Information' section includes: 'Total Transaction Premium: \$3,601.00' and 'Total Taxes/Fees/Surcharges: \$0.00'. At the bottom, the same buttons as in Figure 10 are present: 'SAVE & RESUME LATER', 'SAVE & CONTINUE', 'CALCULATE PREMIUM', 'GO BACK', and 'NEXT'.

Figure 11. Premium Summary with view and print options.

3. Click **NEXT** to go to the Dashboard. From there you can issue the policy.

# Converting a Full Quote to a Policy

Non-Trucking Liability and Physical Damage

## General Information

Once a Full Quote has been created and accepted, you can now convert it to a Policy.

1. On the dashboard, under Choose Next Action, click **Convert to Policy**.

**NOTE:** You have to the option to make changes to the Quick Quote by clicking Edit or Revise. Clicking Edit will allow you to make changes but will not keep a revision history. Clicking Revise will allow you to make changes and the system will create a new quote version. The user can then select which version they want to use to convert to a policy. Inquire will give you the ability to review the quote but not make any changes.

The screenshot shows the Great American Insurance Group P&C Suite dashboard for John Doe. The dashboard includes a top navigation bar with 'Suite Home', 'Reports', and 'Workbench'. Below this, the user's name 'John Doe' is displayed. The main section shows quote details: QUOTE: Q20230306000840-00, REVISION: 000, and VIEW: Full. A table of quote details is shown, including Quoted Premium (\$7,498.50), Escrow Amount (\$0.00), Taxes, Fees, Surcharges (\$0.00), Commission (\$0.00), Policy Period (03/27/2023 - 03/27/2024), Current Due (\$0.00), Open Claims (0), and Status (Pending Quote). Below this, there are three sections: 'Choose Next Action' with links 'Convert to Policy', 'Edit', 'Revise', and 'Inquire'; 'Applicant Information' with fields for Name, Address, FEIN, and Phone; and 'Producer Information' with fields for Code, Name, Address, and Phone. A red arrow points to the 'Convert to Policy' link. At the bottom, there is a table of milestones and a footer with copyright information.

Quoted Premium	Escrow Amount	Taxes, Fees, Surcharges	Commission	Policy Period	Current Due	Open Claims	Status
\$7,498.50	\$0.00	\$0.00	\$0.00	03/27/2023 - 03/27/2024	\$0.00	0	Pending Quote

Choose Next Action	Applicant Information	Producer Information
<a href="#">Convert to Policy</a> <a href="#">Inquire</a>	Name: John Doe Address: 123 Main Street Cincinnati, OH 45206 FEIN: Not Available Phone: Not Available	Code: 0000000010 Name: Test Producer Address: #144 Test St - Changed Plano, TX 75024 Phone: (123) 456-7890

MILESTONE	REVISION	ACTIVITY	TRANSACTION EFFECTIVE DATE	STARTED ON	LAST MODIFIED	MODIFIED BY	STATUS	TRANSACTION PREMIUM	POLICY PREMIUM	REMARKS	CHANGE SUMMARY
Quote	000	New Business	03/27/2023	03/06/2023	03/06/2023	Agent Insurance	Pending	\$7,498.50	\$0.00		

Figure 1. Dashboard.

2. On the Policy screen, you have the option to review each of the screens or simply click **CALCULATE PREMIUM**.



**GREAT AMERICAN** P&C Suite All STARTS CONTAINS ATPP013090 Agent Insurance

---

Suite Home

John Doe

POLICY: ATPP013090-0 REVISION: 025

Transaction Premium \$0.00	Escrow Amount \$0.00	Taxes, Fees, Surcharges \$0.00	Written Premium \$8,148.41	Policy Period 03/27/2023 - 03/27/2024	Current Due \$0.00	Open Claims 0	Status Ready for Booking
-------------------------------	-------------------------	-----------------------------------	-------------------------------	--	-----------------------	------------------	-----------------------------

**Choose Next Action**

[Book](#) [Inquire](#) [Edit](#)

**Applicant Information**

Name: John Doe  
Address: 123 Main Street Cincinnati, OH 45206  
FEIN: Not Available  
Phone: Not Available

**Producer Information**

Code: 0000000010  
Name: Test Producer  
Address: #144 Test St - Changed Plano, TX 75024  
Phone: (123) 456-7890

LifeCycle Email Activities Referral History Payment Plan UW Rules Claims Tasks

MILESTONE	REVISION	ACTIVITY	TRANSACTION EFFECTIVE DATE	STARTED ON	LAST MODIFIED	MODIFIED BY	STATUS	TRANSACTION PREMIUM	POLICY PREMIUM	REMARKS	CHANGE SUMMARY
Quote C20230306000840-00	000	New Business Quote	03/27/2023	03/06/2023 09:47	03/06/2023 14:18	Edith Breeze	Converted to Policy	\$7,498.50	\$0.00		

Figure 4. Book the Policy.

6. Wait for the **Status** to update to **In Force**.

**GREAT AMERICAN** P&C Suite All STARTS CONTAINS ATPP013090 Agent Insurance

---

Suite Home

John Doe

POLICY: ATPP013090-0 REVISION: 025

Transaction Premium \$0.00	Escrow Amount \$0.00	Taxes, Fees, Surcharges \$0.00	Written Premium \$8,148.41	Policy Period 03/27/2023 - 03/27/2024	Current Due \$0.00	Open Claims 0	Status In Force
-------------------------------	-------------------------	-----------------------------------	-------------------------------	--	-----------------------	------------------	--------------------

**Choose Next Action**

[Endorse](#) [Inquire](#) [Pending Cancellation](#)

**Applicant Information**

Name: John Doe  
Address: 123 Main Street Cincinnati, OH 45206  
FEIN: Not Available  
Phone: Not Available

**Producer Information**

Code: 0000000010  
Name: Test Producer  
Address: #144 Test St - Changed Plano, TX 75024  
Phone: (123) 456-7890

LifeCycle Email Activities Referral History Payment Plan Forms Documents UW Rules Claims Tasks Billing Inquiry

MILESTONE	REVISION	ACTIVITY	TRANSACTION EFFECTIVE DATE	STARTED ON	LAST MODIFIED	MODIFIED BY	STATUS	TRANSACTION PREMIUM	POLICY PREMIUM	REMARKS	CHANGE SUMMARY
Quote C20230306000840-00	000	New Business Quote	03/27/2023	03/06/2023 09:47	03/06/2023 14:18	Edith Breeze	Converted to Policy	\$7,498.50	\$0.00		

Figure 5. Status updated to In Force.

# Creating a Quick Quote

## Occupational Accident

### General Information

Click on the link to access Great Roadmap: [gaigtrucking.cloudinsurer.com](https://gaigtrucking.cloudinsurer.com)

Follow these instructions to create a Quick Quote for Occupational Accident. Once a Quick Quote has been created, you can then create a Full Quote and Issue.

### Login Page

1. Login to Great Roadmap using your GAIG username and password.
2. On the Create New Quote Tile, select **Occupational Accident** from the drop-down menu.
3. Click **Let's Begin**.

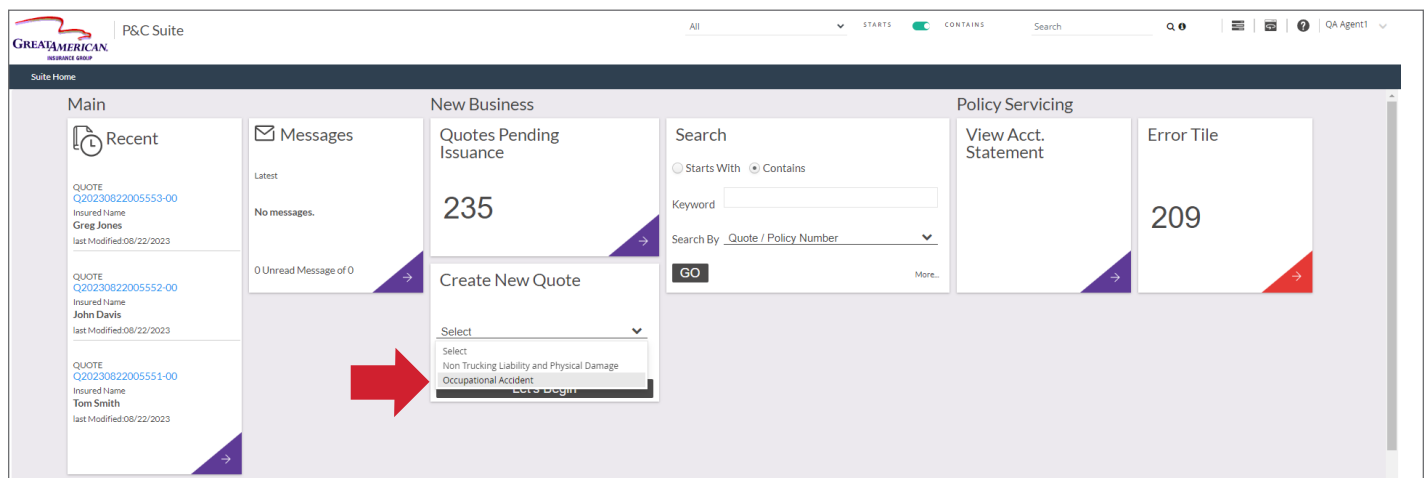


Figure 1. Home screen.

## Quote/Product Information Screen

1. Enter the **Effective Date**.

The screenshot shows the 'Quote/Product Information' screen in the P&C Suite. The top navigation bar includes the Great American Insurance Group logo, 'P&C Suite', and search filters. The main content area has a sidebar with 'Quote' selected, showing 'Coverages', 'Individuals', and 'Premium Summary'. The main form area is titled 'Quote/Product Information' and contains the following fields:

- Product: Occupational Accident
- Do you want to copy data from existing NTLPD Quote/ Policy?: Yes (selected), No
- Company: Great American Insurance Company
- Policy Type: Individual Owner / Operator
- Business Segment: Trucking - Occupational Accident
- Term of Insurance: Annual
- Effective Date: [Red bar indicating required field]
- Expiration Date: [Red bar indicating required field]
- Underwriter: [Red bar indicating required field]

A red arrow points to the 'Effective Date' field. The bottom of the screen has a 'CANCEL' button and a 'NEXT' button.

Figure 2. Enter the Effective Date.

**NOTE:** Required fields are indicated by a red bar.

**NOTE:** The Effective Date can only be back-dated by 3 days.

2. Scroll down to Policy Holder Information and enter the required information.

The screenshot shows the 'Policyholder Information' screen in the P&C Suite. The top navigation bar is the same as Figure 2. The main content area has a sidebar with 'Quote' selected, showing 'Coverages', 'Individuals', and 'Premium Summary'. The main form area is titled 'Policyholder Information' and contains the following fields:

- Producer Code: [Red bar indicating required field]
- Producer Name: [Red bar indicating required field]
- Type of Business: Individual
- First Name: [Red bar indicating required field]
- Middle Initial: [Red bar indicating required field]
- Last Name: [Red bar indicating required field]
- Suffix: [Red bar indicating required field]

A red arrow points to the 'Type of Business' field. The bottom of the screen has a 'CANCEL' button and a 'NEXT' button.

Figure 3. Policyholder Information.

**NOTE:** If you enter the ZIP code first, the city and state will auto-populate.

3. When finished, click **NEXT**.

## Coverages Screen

1. Click on the **View Plan Info** to view information about the Schedule of Benefits for each plan.
2. Click the search icon (magnifying glass) to open the **Plan** pop-up window and select a plan.

The screenshot displays the 'P&C Suite' interface for a user named John Doe. The top navigation bar includes the Great American Insurance Group logo and the text 'P&C Suite'. Below this, a dark blue bar contains 'Suite Home', 'Workbench', and 'Task Management'. The main content area shows 'John Doe' and 'QUOTE: Q20230823022808-00'. The 'Coverages' section is active, displaying a 'Plan' field with a search icon. A red arrow points to the 'View Plan Info' link. Another red arrow points to the search icon next to the 'Plan' field. The bottom of the screen features a navigation bar with buttons for 'SAVE & RESUME LATER', 'SAVE & CONTINUE', 'CALCULATE PREMIUM', 'GO BACK', and 'NEXT'. A large red arrow points to the 'NEXT' button.

Figure 4. Coverages screen

3. Under Rating Information, do the following:
  - a. Select the **Primary Commodity Hauled** from the pop-up window.
  - b. Select the **Radius of Operation** from the pop-up window.
  - c. Select **Yes/No** for **Hazmat Authority**.
  - d. Select **Yes/No** for **Does the Individual Load/Unload?**
4. When finished, click **NEXT**.



## Individuals Screen

1. Click **ADD** to add an individual. Up to ten individuals can be added.

**NOTE:** The first individual will default to the owner/operator.

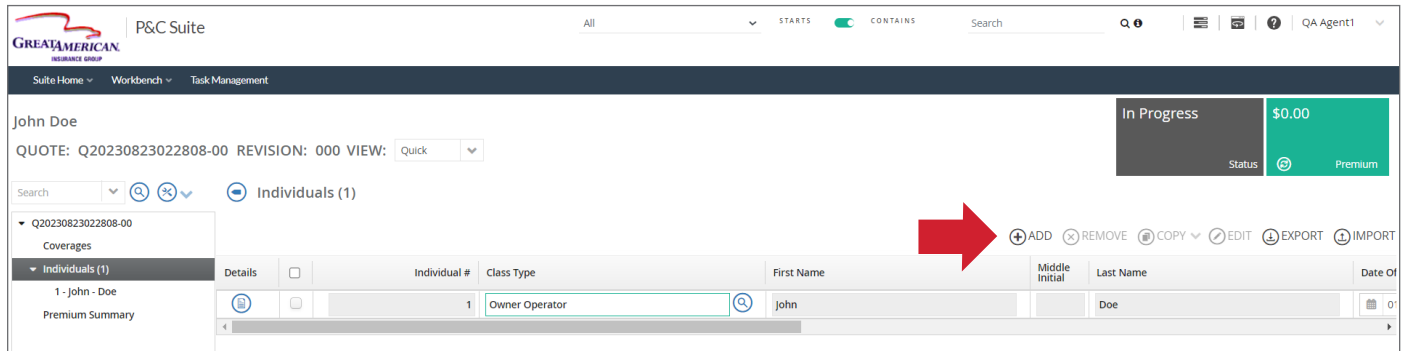
The screenshot shows the 'P&C Suite' interface. At the top, there's a navigation bar with 'Suite Home', 'Workbench', and 'Task Management'. Below this, the user 'John Doe' is logged in, with 'In Progress' status and '\$0.00' premium. A search bar and a list of individuals are visible. The 'Individuals (1)' list shows one entry: '1 - John - Doe' with 'Owner Operator' as the class type. A red arrow points to the 'ADD' button in the top right corner of the list.

Figure 5. Individuals screen shown with an individual already added.

2. On each individual's screen, enter the **Date of Birth**.

**NOTE:** For quick quote, the Date of Birth is the only required field for each individual. All other information (e.g. CDL State, CDL #, etc.) will be required at full quote.

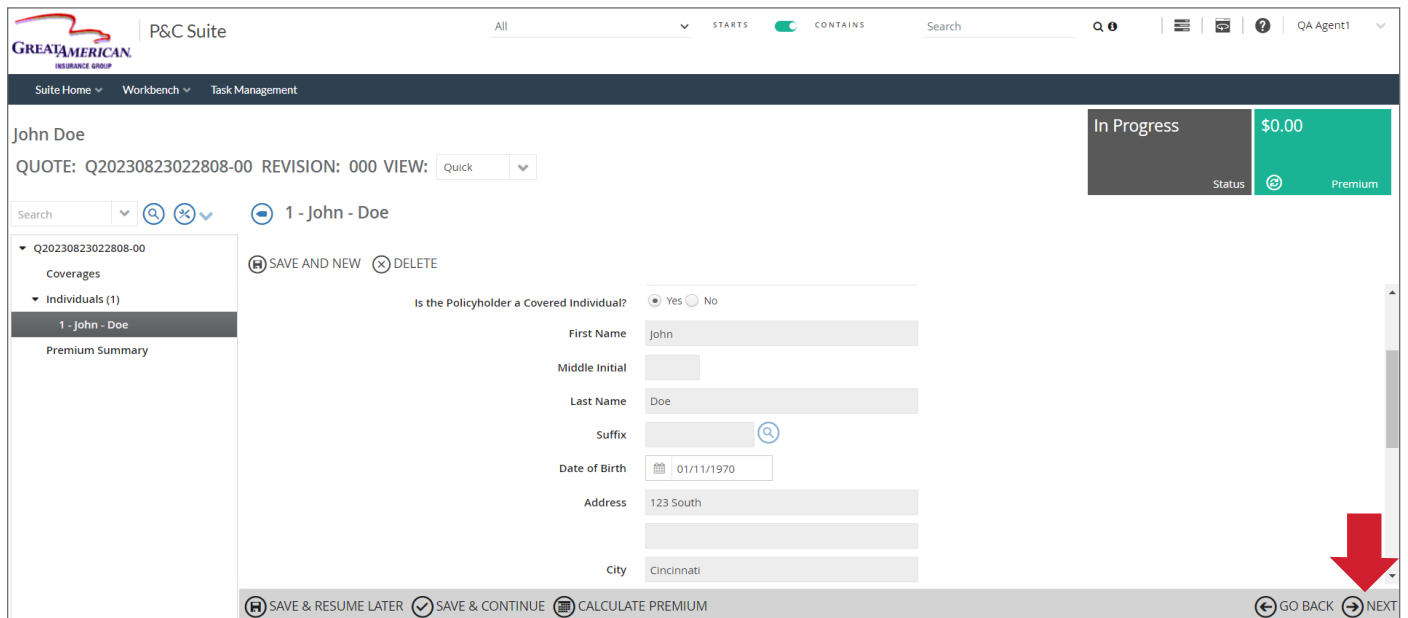
The screenshot shows the 'P&C Suite' interface for an individual. The user 'John Doe' is logged in, with 'In Progress' status and '\$0.00' premium. The 'Individuals (1)' list shows one entry: '1 - John - Doe'. The 'Details' tab is selected, showing fields for 'First Name', 'Middle Initial', 'Last Name', 'Suffix', 'Date of Birth', 'Address', and 'City'. The 'Date of Birth' field is highlighted with a red arrow. Below the form, there are buttons for 'SAVE AND NEW', 'DELETE', 'SAVE & RESUME LATER', 'SAVE & CONTINUE', 'CALCULATE PREMIUM', 'GO BACK', and 'NEXT'.

Figure 6. Enter the Individual's Date of Birth.

3. Click **NEXT** and continue adding individuals as needed.

**NOTE:** For additional individuals, you will need to select the Class Type (Owner Operator or Passenger) and enter any required information (Associated Owner Operator, Name, DOB, and Address).

4. When finished, click **DONE WITH INDIVIDUALS**.

# Premium Summary Screen

1. On the Premium Summary screen, click **Calculate Premium** to see the Premium Summary.

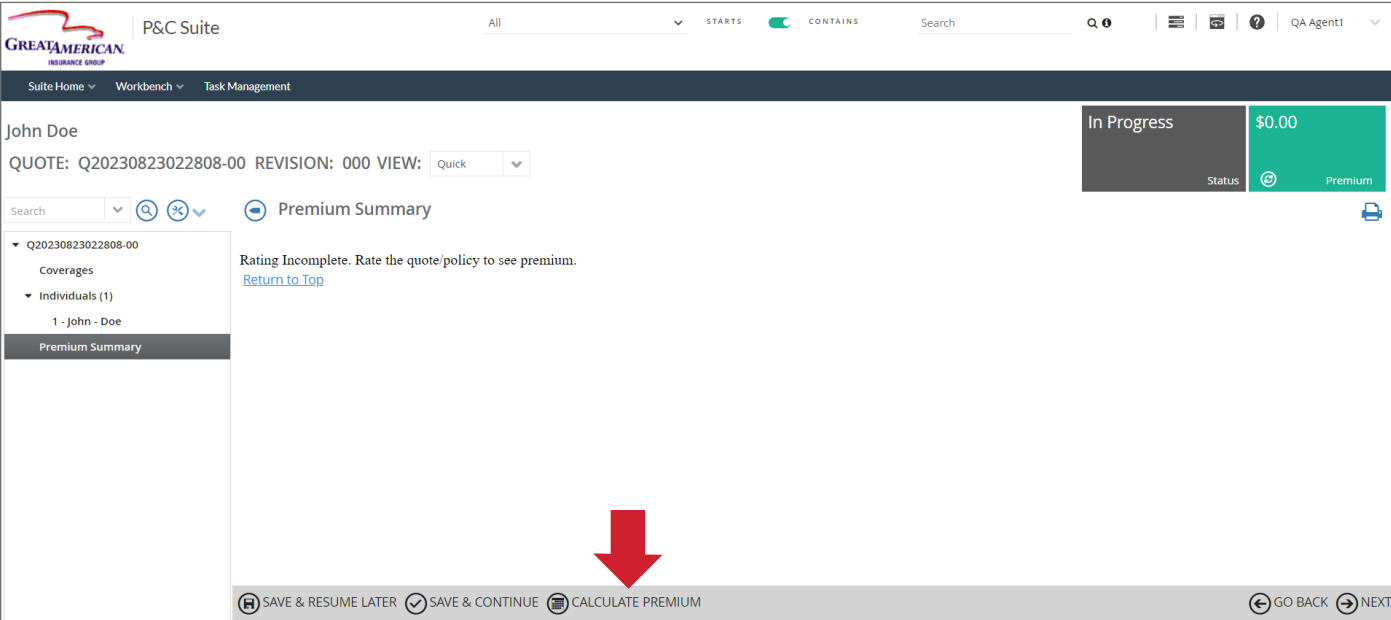


Figure 7. Premium Summary screen before calculating the premium.

2. When finished, click **NEXT** to go to the Dashboard. From there you can convert the Quick Quote to a Full Quote.

**NOTE:** On the dashboard, wait for the status to update to Pending Quote.



## Billing Information and Coverage Review

1. On the Quote screen, scroll down to the Billing Information section and select a **Billing Option** and **Payment Plan**.

**NOTE:** For Direct Bill, you need to verify the billing address and make a payment in the system before you can bind and issue the policy. For Agency Bill, the Billing Information fields will auto-populate and the agent will be responsible for collecting payment.

The screenshot displays the 'P&C Suite' interface. At the top, there's a navigation bar with 'All', 'STARTS', 'CONTAINS', and a search bar. Below this, the user 'John Doe' is logged in, and the quote number 'Q20230320000917-00' is visible. The status is 'In Progress' with a premium of '\$1,980.00'. The 'Billing Information' section is expanded, showing fields for 'Billing Option' (Agency Bill), 'Payment Plan' (Agency Bill - Full Pay), 'Billing Cycle' (Cut Off), 'Deposit Required' (Yes/No), 'Billing Address Details same as Policyholder?' (Yes/No), 'Billing Address', 'City', and 'State'. A red arrow points to the 'Billing Option' field, and another red arrow points to the 'NEXT' button at the bottom right.

Figure 2. Billing Information.

2. Click **NEXT** when finished entering the Billing Information to review or make changes to the Coverages screen.
3. When finished, click **NEXT** to review or make changes to the Individuals screen.

4. When finished, click **NEXT** to go to the Premium Summary screen.

## Print Summary Screen

1. On the Premium Summary screen, click **NEXT** or **SAVE AND CONTINUE** to go to the dashboard.

The screenshot shows the 'Premium Summary' screen for John Doe. The top navigation bar includes the Great American Insurance Group logo, 'P&C Suite', and various filters. The main content area displays 'General Information' and 'Premium Information'. A red arrow points to the 'NEXT' button at the bottom right.

General Information	Premium Information
Policyholder: John Doe	Payment Plan: Bill - Full Pay
Effective Date: 03/20/2023	
Expiration Date: 03/20/2024	
Term of Insurance: Annual	
Company: Great American Insurance Company	
Producer Name: Agent Insurance	
Policy Type: Individual Owner / Operator	

At the bottom, there are buttons for 'SAVE & RESUME LATER', 'SAVE & CONTINUE', 'CALCULATE PREMIUM', 'GO BACK', and 'NEXT'. A red arrow points to the 'NEXT' button.

Figure 3. Premium Summary Screen.

2. On the Dashboard, wait for the **Status** to update to **Pending Quote**. From here you can convert the Full Quote to a Policy.

The screenshot shows the 'Dashboard' screen for John Doe. The top navigation bar is the same as in Figure 3. The main content area displays a table with columns for Milestone, Revision, Activity, Transaction Effective Date, Started On, Last Modified, Modified By, Status, Transaction Premium, Policy Premium, Remarks, and Change Summary. A red arrow points to the 'Status' column, which shows 'Pending Quote'.

MILESTONE	REVISION	ACTIVITY	TRANSACTION EFFECTIVE DATE	STARTED ON	LAST MODIFIED	MODIFIED BY	STATUS	TRANSACTION PREMIUM	POLICY PREMIUM	REMARKS	CHANGE SUMMARY
Quote Q20230320000917-00	000	New Business Quote	03/20/2023	03/20/2023 09:37	03/20/2023 12:28	Agent Insurance	Pending Quote	\$1,980.00	\$0.00		

Figure 4. Dashboard with a Full Quote ready to be converted to a policy.

# Converting a Full Quote to a Policy

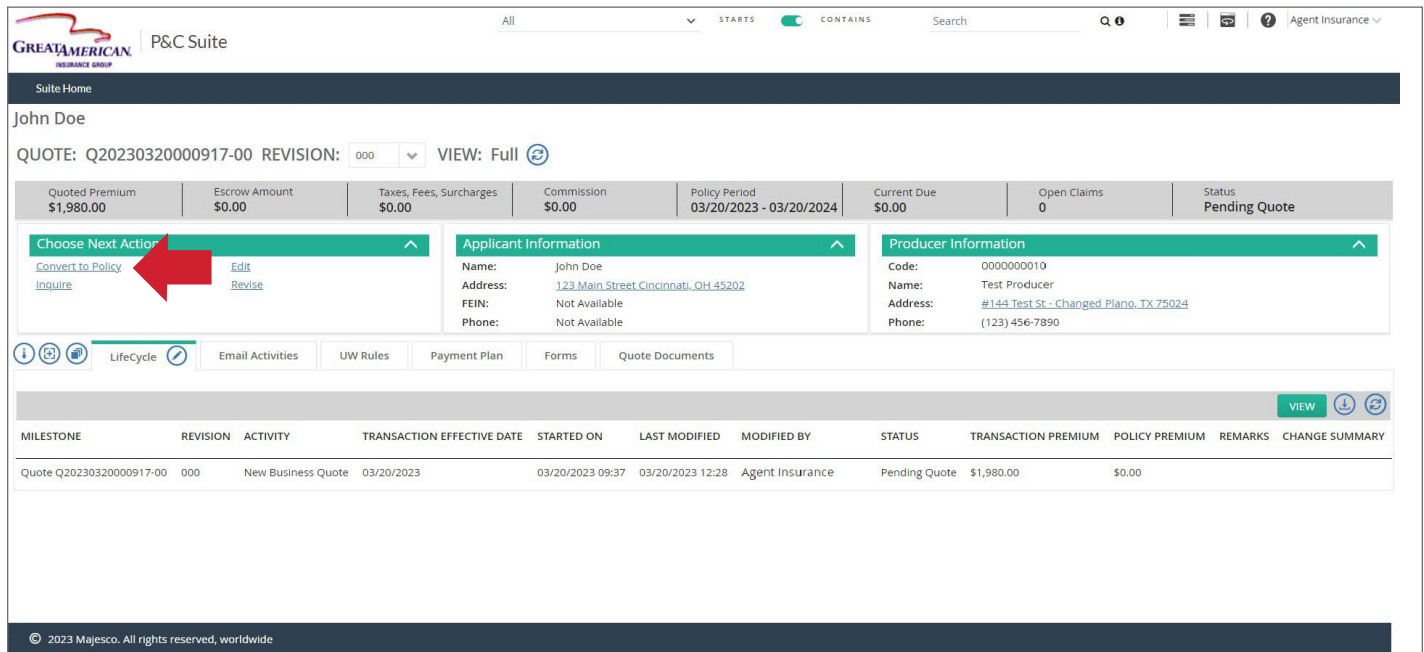
## Occupational Accident

### General Information

Once a Full Quote has been created and accepted, you can convert it to a Policy from the dashboard.

1. On the dashboard, under Choose Next Action, click **Convert to Policy**.

**NOTE:** You have to the option to make changes to the Quick Quote by clicking *Edit* or *Revise*. Clicking *Edit* will allow you to make changes but will not keep a revision history. Clicking *Revise* will allow you to make changes and the system will create a new quote version. The user can then select which version they want to use to convert to a policy. *Inquire* will give you the ability to review the quote but not make any changes.



The screenshot displays the 'P&C Suite' dashboard for 'John Doe'. The quote ID is 'Q20230320000917-00' with revision '000' and view 'Full'. The quote status is 'Pending Quote'. The 'Choose Next Action' section has a red arrow pointing to the 'Convert to Policy' button. The 'Applicant Information' and 'Producer Information' sections are also visible.

Quoted Premium	Escrow Amount	Taxes, Fees, Surcharges	Commission	Policy Period	Current Due	Open Claims	Status
\$1,980.00	\$0.00	\$0.00	\$0.00	03/20/2023 - 03/20/2024	\$0.00	0	Pending Quote

MILESTONE	REVISION	ACTIVITY	TRANSACTION EFFECTIVE DATE	STARTED ON	LAST MODIFIED	MODIFIED BY	STATUS	TRANSACTION PREMIUM	POLICY PREMIUM	REMARKS	CHANGE SUMMARY
Quote Q20230320000917-00	000	New Business Quote	03/20/2023	03/20/2023 09:37	03/20/2023 12:28	Agent Insurance	Pending Quote	\$1,980.00	\$0.00		

Figure 1. Policy Dashboard showing a Pending Quote status.

2. On the Policy Screen, you have the option to review each of the screens by clicking **NEXT**, or simply click **SAVE AND CONTINUE** to jump to the dashboard.

**NOTE:** If you selected *Direct Bill*, the system will require you to enter any billing information on the *Payment Plan* tab on the dashboard.

John Doe  
POLICY: Policy REVISION: 000

In Progress \$1,980.00

Policy

Policy/Product Information

Product: Occupational Accident  
Company: Great American Insurance Company  
Policy Type: Individual Owner / Operator  
Business Segment: Trucking - Occupational Accident  
Term of Insurance: Annual  
Effective Date: 03/20/2023  
Expiration Date: 03/20/2024  
Underwriter: QA Underwriter

SAVE & CONTINUE CANCEL CALCULATE PREMIUM

Figure 2. Policy screen.

3. On the dashboard, wait for the Status to update to **Ready for Booking**.

John Doe  
POLICY: OAP013655-0 REVISION: 000

Transaction Premium \$1,980.00	Escrow Amount \$0.00	Taxes, Fees, Surcharges \$0.00	Written Premium \$1,980.00	Commission \$0.00	Policy Period 03/20/2023 - 03/20/2024	Current Due \$0.00	Open Claims 0	Status Ready for Booking
-----------------------------------	-------------------------	-----------------------------------	-------------------------------	----------------------	--	-----------------------	------------------	-----------------------------

Choose Next Action: Book, Edit

Applicant Information: Name: John Doe, Address: 123 Main Street Cincinnati, OH 45202, FEIN: Not Available, Phone: Not Available

Producer Information: Code: 0000000010, Name: Test Producer, Address: #144 Test St - Changed Plano, TX 75024, Phone: (123) 456-7890

MILESTONE	REVISION	ACTIVITY	TRANSACTION EFFECTIVE DATE	STARTED ON	LAST MODIFIED	MODIFIED BY	STATUS	TRANSACTION PREMIUM	POLICY PREMIUM	REMARKS	CHANGE SUMMARY
Quote Q20230320000917-00	000	New Business Quote	03/20/2023	03/20/2023 09:37	03/20/2023 12:28	Agent Insurance	Converted to Policy	\$1,980.00	\$0.00		
Policy OAP013655-0	000	Quote to Policy	03/20/2023	03/20/2023 12:37	03/20/2023 12:40	Agent Insurance	Ready for Booking	\$1,980.00	\$1,980.00		

Figure 3. Dashboard showing the policy is ready for booking.

4. Under Choose Next Action, click **Book**.

**NOTE:** You will now be able to create endorsements like adding/removing drivers and passengers.

# Creating an Endorsement

## Trucking

### General Information

Once a policy has been issued, you can now create an Endorsement.

### Searching for a Policy

1. On the home screen, in the Search tile, search by **Quote/Policy Number**, or **Insured Name/DBA**.
2. Select **Starts With** or **Contains**.
3. Enter the **Keyword** (i.e. Policy Number, Insured Name, or Claim Number).
4. Click **GO**.

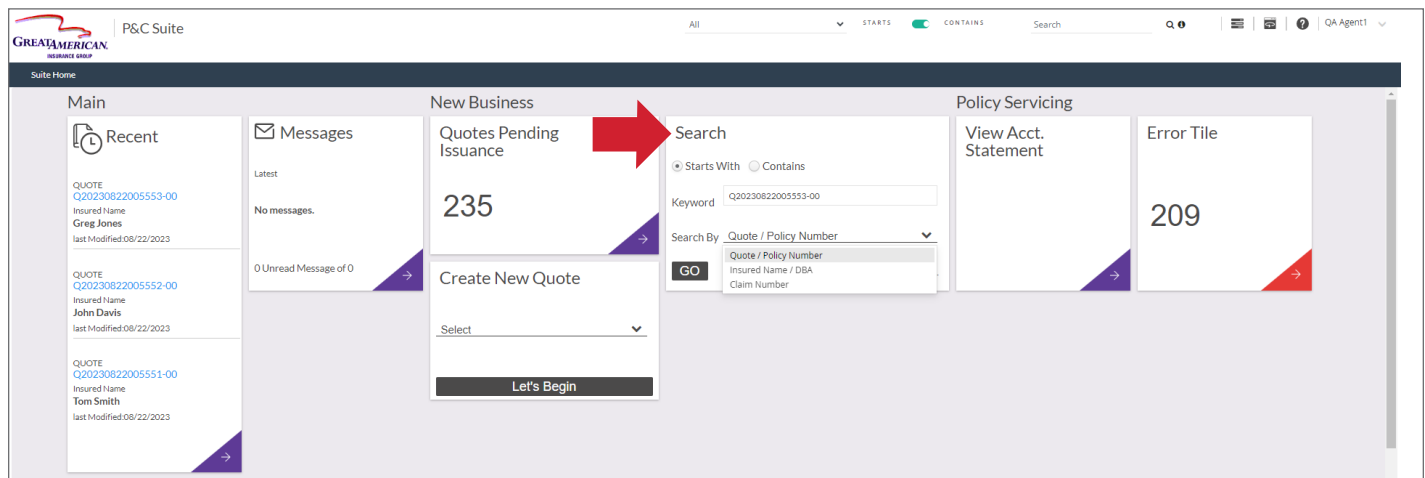
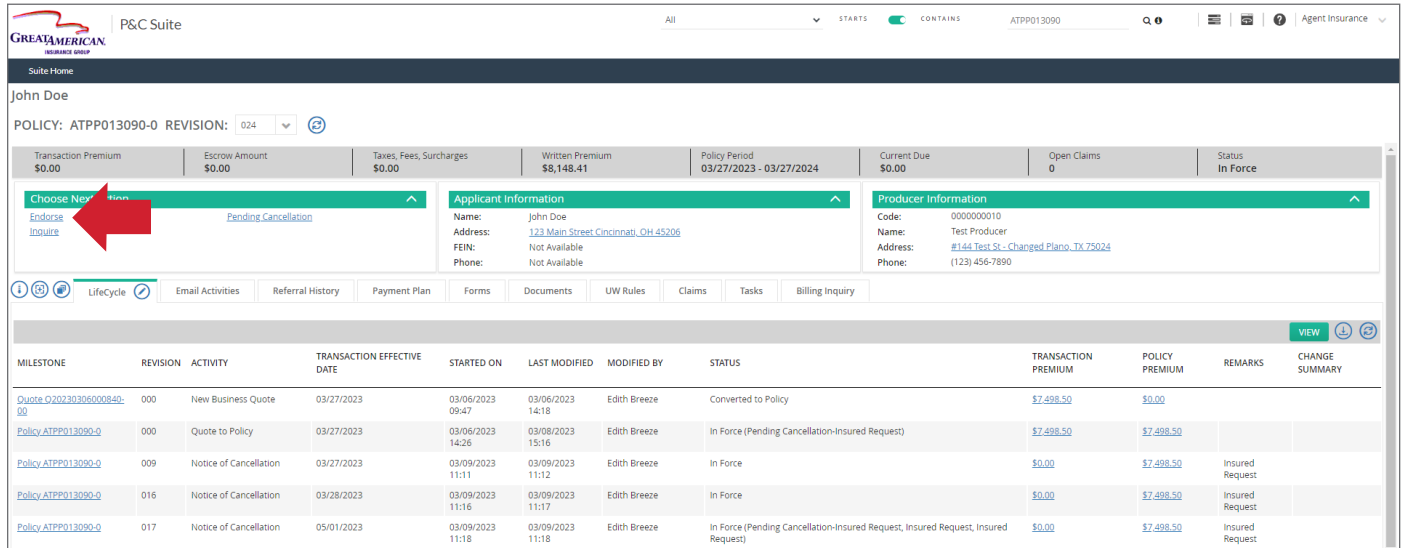


Figure 1. Searching from the Home screen.



## Creating an Endorsement

1. On the Dashboard, under Choose Next Action, click **Endorse**.



**John Doe**  
POLICY: ATPP013090-0 REVISION: 024

Transaction Premium \$0.00	Escrow Amount \$0.00	Taxes, Fees, Surcharges \$0.00	Written Premium \$8,148.41	Policy Period 03/27/2023 - 03/27/2024	Current Due \$0.00	Open Claims 0	Status In Force
-------------------------------	-------------------------	-----------------------------------	-------------------------------	--	-----------------------	------------------	--------------------

**Choose Next Action**  
Endorse (highlighted with red arrow)  
Inquire

**Applicant Information**  
Name: John Doe  
Address: 123 Main Street Cincinnati, OH 45206  
FEIN: Not Available  
Phone: Not Available

**Producer Information**  
Code: 0000000010  
Name: Test Producer  
Address: #144 Test St - Changed Plano, TX 75024  
Phone: (123) 456-7890

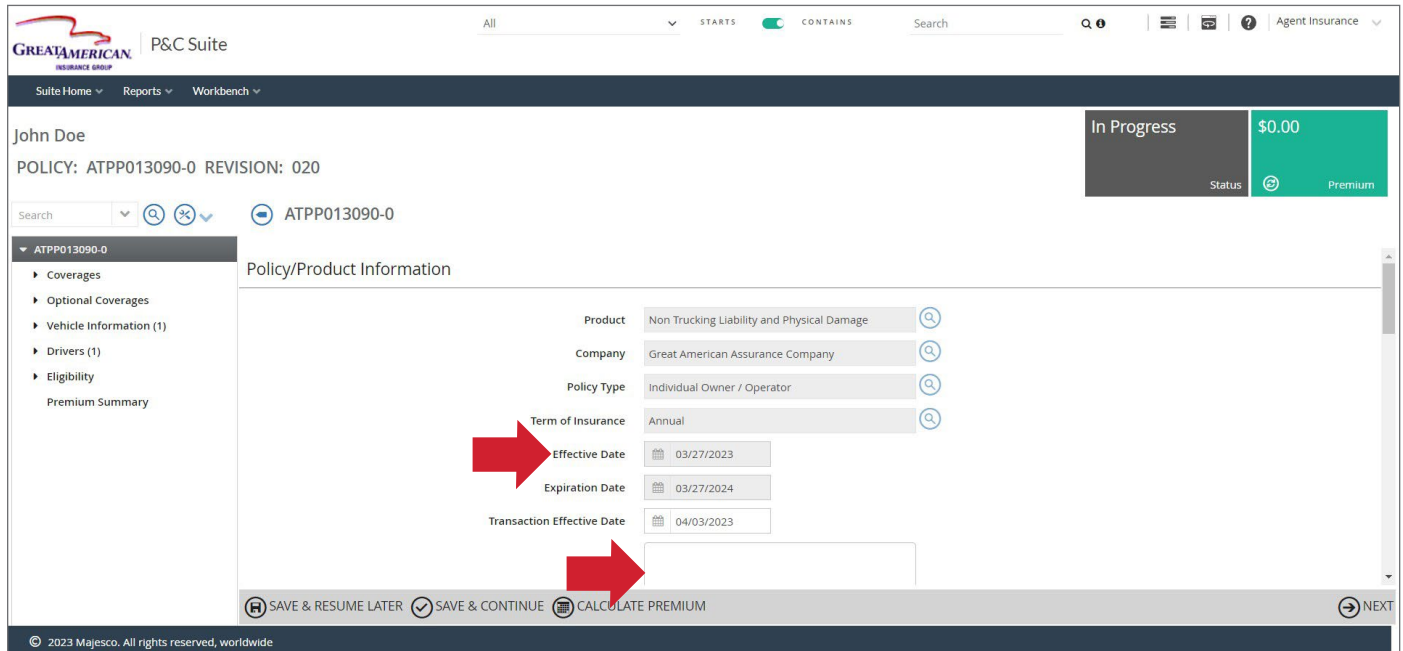
**LifeCycle** | Email Activities | Referral History | Payment Plan | Forms | Documents | UW Rules | Claims | Tasks | Billing Inquiry

MILESTONE	REVISION	ACTIVITY	TRANSACTION EFFECTIVE DATE	STARTED ON	LAST MODIFIED	MODIFIED BY	STATUS	TRANSACTION PREMIUM	POLICY PREMIUM	REMARKS	CHANGE SUMMARY
Quote Q20230305000840-00	000	New Business Quote	03/27/2023	03/06/2023 09:47	03/06/2023 14:18	Edith Breeze	Converted to Policy	\$7,498.50	\$0.00		
Policy ATPP013090-0	000	Quote to Policy	03/27/2023	03/06/2023 14:26	03/08/2023 15:16	Edith Breeze	In Force (Pending Cancellation-Insured Request)	\$7,498.50	\$7,498.50		
Policy ATPP013090-0	009	Notice of Cancellation	03/27/2023	03/09/2023 11:11	03/09/2023 11:12	Edith Breeze	In Force	\$0.00	\$7,498.50	Insured Request	
Policy ATPP013090-0	016	Notice of Cancellation	03/28/2023	03/09/2023 11:16	03/09/2023 11:17	Edith Breeze	In Force	\$0.00	\$7,498.50	Insured Request	
Policy ATPP013090-0	017	Notice of Cancellation	05/01/2023	03/09/2023 11:18	03/09/2023 11:18	Edith Breeze	In Force (Pending Cancellation-Insured Request; Insured Request; Insured Request)	\$0.00	\$7,498.50	Insured Request	

Figure 2. Dashboard.

2. On the Policy screen, enter the **Transaction Effective Date** and enter a **Remark** stating what the endorsement is changing on the policy.

**NOTE:** Endorsements cannot be backdated more than 3 days or future dated more than 120 days. Transaction Effective Dates outside of this must be submitted to the underwriter for review.



**John Doe**  
POLICY: ATPP013090-0 REVISION: 020

**In Progress** | **\$0.00**  
Status | Premium

Search | ATPP013090-0

**ATPP013090-0**  
 > Coverages  
 > Optional Coverages  
 > Vehicle Information (1)  
 > Drivers (1)  
 > Eligibility  
 Premium Summary

**Policy/Product Information**

Product: Non Trucking Liability and Physical Damage  
 Company: Great American Assurance Company  
 Policy Type: Individual Owner / Operator  
 Term of Insurance: Annual  
 Effective Date: 03/27/2023  
 Expiration Date: 03/27/2024  
 Transaction Effective Date: 04/03/2023

SAVE & RESUME LATER | SAVE & CONTINUE | CALCULATE PREMIUM | NEXT

Figure 3. Policy screen with a Transaction Effective Date.

3. Review the Insured Information and make changes as needed.

**NOTE:** You can review each screen and make any changes as needed without having to go in and out of the policy if there are multiple changes needed.

4. For endorsements, you can do one of the following:
- a. Click **NEXT** to navigate through each of the screens to review or make changes as needed.
  - b. Click **Save and Continue** to return to the dashboard.

John Doe  
POLICY: ATPP013090-0 REVISION: 020

Garage State: Ohio

NTL Coverages

Coverage	Limit	Deductible	Option
Bodily Injury / Property Damage	\$1,000,000	N/A	N/A
Uninsured Motorist			
Uninsured Motorist - PD			
Under Insured Motorist			

PD Coverages

SAVE & RESUME LATER SAVE & CONTINUE CALCULATE PREMIUM GO BACK NEXT

Figure 4. Click NEXT or Save and Continue

5. Wait for the **Status** to update to **Ready for Booking**.

John Doe  
POLICY: ATPP013090-0 REVISION: 025

Transaction Premium: \$0.00, Escrow Amount: \$0.00, Taxes, Fees, Surcharges: \$0.00, Written Premium: \$6,148.41, Policy Period: 03/27/2023 - 03/27/2024, Current Due: \$0.00, Open Claims: 0, Status: Ready for Booking

Choose Next Action: Edit

Applicant Information: Name: John Doe, Address: 123 Main Street Cincinnati, OH 45206, FEIN: Not Available, Phone: Not Available

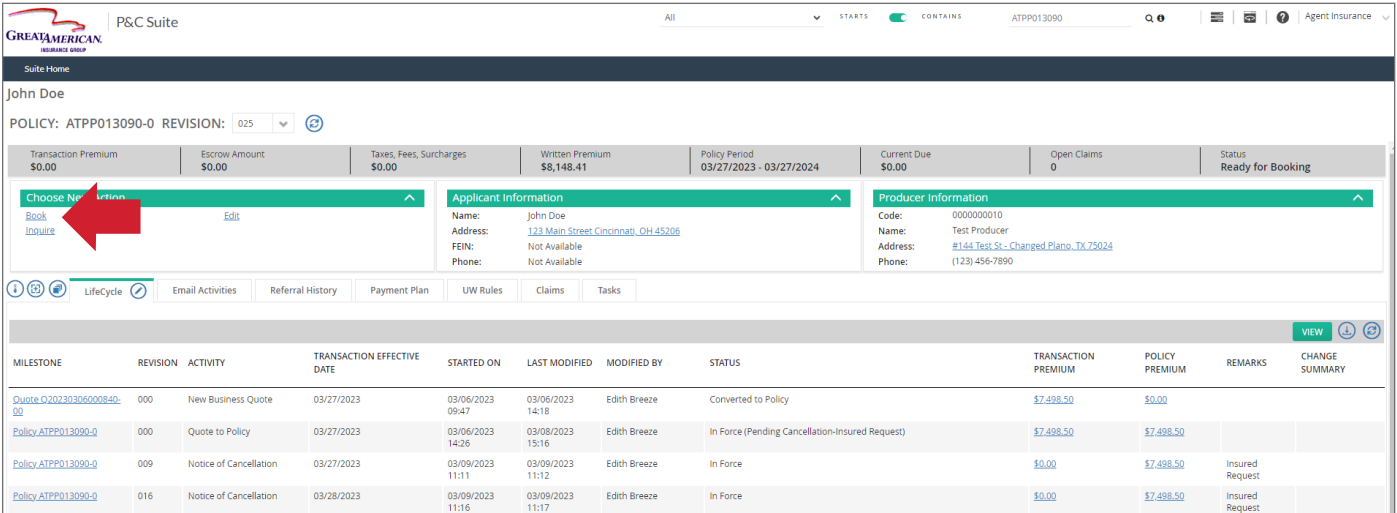
Producer Information: Code: 000000010, Name: Test Producer, Address: #144 Test St - Chagred Plano, TX 75024, Phone: (123) 456-7890

MILESTONE	REVISION	ACTIVITY	TRANSACTION EFFECTIVE DATE	STARTED ON	LAST MODIFIED	MODIFIED BY	STATUS	TRANSACTION PREMIUM	POLICY PREMIUM	REMARKS	CHANGE SUMMARY
Quote 020230306000940-00	000	New Business Quote	03/27/2023	03/06/2023 09:47	03/06/2023 14:18	Edith Breeze	Converted to Policy	\$7,498.50	\$0.00		
Policy ATPP013090-0	000	Quote to Policy	03/27/2023	03/06/2023 14:26	03/09/2023 15:16	Edith Breeze	In Force (Pending Cancellation-Insured Request)	\$7,498.50	\$7,498.50		
Policy ATPP013090-0	009	Notice of Cancellation	03/27/2023	03/09/2023 11:11	03/09/2023 11:12	Edith Breeze	In Force	\$0.00	\$7,498.50	Insured Request	
Policy ATPP013090-0	016	Notice of Cancellation	03/28/2023	03/09/2023 11:16	03/09/2023 11:17	Edith Breeze	In Force	\$0.00	\$7,498.50	Insured Request	

Figure 5. Dashboard with status update.

6. Under Choose Next Action, click **Book**.

**NOTE:** Money bearing endorsements will require payment prior to booking.

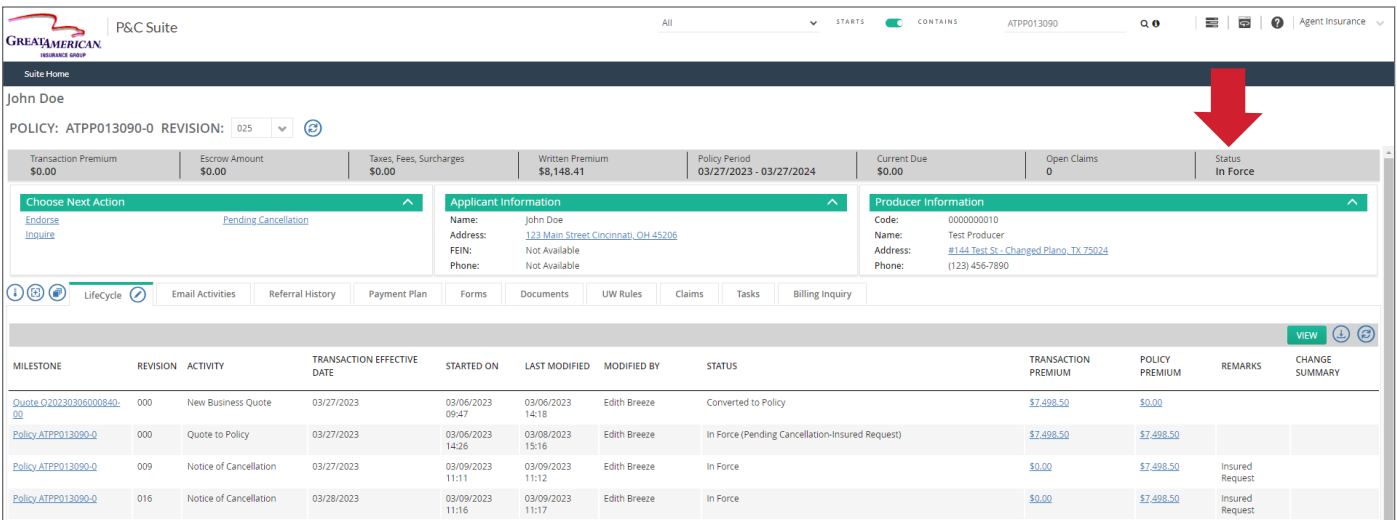


The screenshot shows the P&C Suite interface for John Doe. The 'Choose Next Action' dropdown menu is open, and the 'Book' option is selected. The 'Status' field is 'Ready for Booking'. The 'Transaction Premium' is \$0.00, 'Escrow Amount' is \$0.00, 'Taxes, Fees, Surcharges' is \$0.00, 'Written Premium' is \$8,148.41, 'Policy Period' is 03/27/2023 - 03/27/2024, 'Current Due' is \$0.00, and 'Open Claims' is 0.

MILESTONE	REVISION	ACTIVITY	TRANSACTION EFFECTIVE DATE	STARTED ON	LAST MODIFIED	MODIFIED BY	STATUS	TRANSACTION PREMIUM	POLICY PREMIUM	REMARKS	CHANGE SUMMARY
Quote D20230306000840-00	000	New Business Quote	03/27/2023	03/06/2023 09:47	03/06/2023 14:18	Edith Breeze	Converted to Policy	\$7,498.50	\$0.00		
Policy ATPP013090-0	000	Quote to Policy	03/27/2023	03/06/2023 14:26	03/08/2023 15:16	Edith Breeze	In Force (Pending Cancellation-Insured Request)	\$7,498.50	\$7,498.50		
Policy ATPP013090-0	009	Notice of Cancellation	03/27/2023	03/09/2023 11:11	03/09/2023 11:12	Edith Breeze	In Force	\$0.00	\$7,498.50	Insured Request	
Policy ATPP013090-0	016	Notice of Cancellation	03/28/2023	03/09/2023 11:16	03/09/2023 11:17	Edith Breeze	In Force	\$0.00	\$7,498.50	Insured Request	

Figure 6. Book the Endorsement.

7. Wait for the **Status** to update to **In Force**.



The screenshot shows the P&C Suite interface for John Doe. The 'Status' field is now 'In Force'. The 'Transaction Premium' is \$0.00, 'Escrow Amount' is \$0.00, 'Taxes, Fees, Surcharges' is \$0.00, 'Written Premium' is \$8,148.41, 'Policy Period' is 03/27/2023 - 03/27/2024, 'Current Due' is \$0.00, and 'Open Claims' is 0.

MILESTONE	REVISION	ACTIVITY	TRANSACTION EFFECTIVE DATE	STARTED ON	LAST MODIFIED	MODIFIED BY	STATUS	TRANSACTION PREMIUM	POLICY PREMIUM	REMARKS	CHANGE SUMMARY
Quote D20230306000840-00	000	New Business Quote	03/27/2023	03/06/2023 09:47	03/06/2023 14:18	Edith Breeze	Converted to Policy	\$7,498.50	\$0.00		
Policy ATPP013090-0	000	Quote to Policy	03/27/2023	03/06/2023 14:26	03/08/2023 15:16	Edith Breeze	In Force (Pending Cancellation-Insured Request)	\$7,498.50	\$7,498.50		
Policy ATPP013090-0	009	Notice of Cancellation	03/27/2023	03/09/2023 11:11	03/09/2023 11:12	Edith Breeze	In Force	\$0.00	\$7,498.50	Insured Request	
Policy ATPP013090-0	016	Notice of Cancellation	03/28/2023	03/09/2023 11:16	03/09/2023 11:17	Edith Breeze	In Force	\$0.00	\$7,498.50	Insured Request	

Figure 7. Status updated to In Force.

# Cancelling a Policy

## Trucking

### General Information

Once a policy has been issued, you can now submit for Cancellation.

### Searching for a Policy

1. On the home screen, in the Search tile, search by **Quote/Policy Number** or **Insured Name/DBA**.
2. Select **Starts With** or **Contains**.
3. Enter the **Keyword** (i.e. Policy Number or Insured Name).
4. Click **GO**.

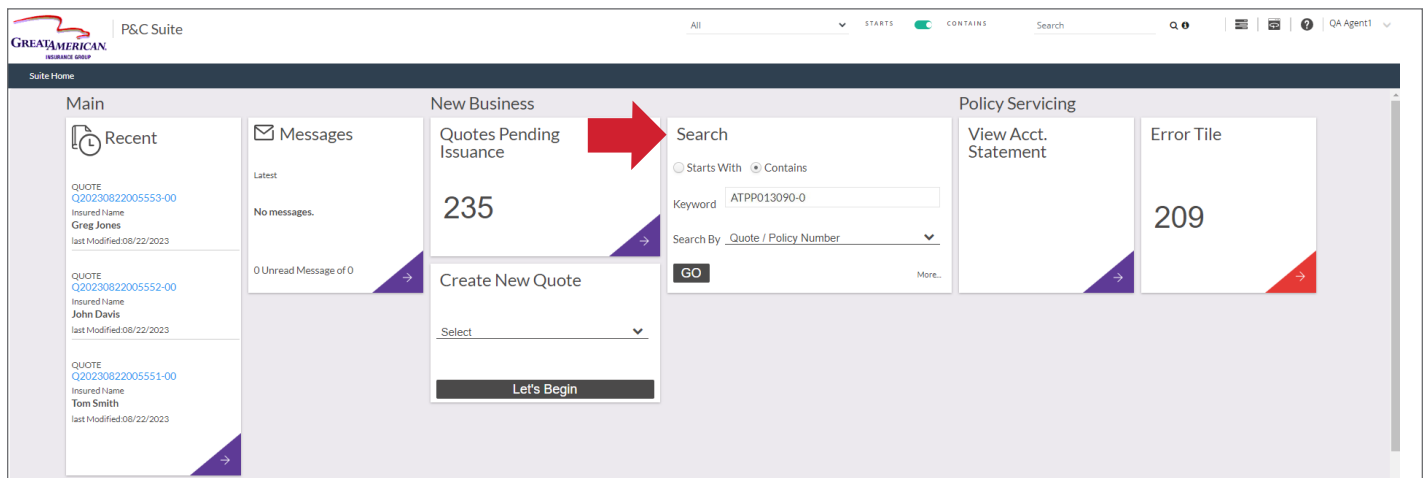


Figure 1. Searching from the Home screen.

## Cancelling a Policy

1. On the Dashboard, under Choose Next Action, click **Pending Cancellation**.

**John Doe**  
POLICY: ATPP013090-0 REVISION: 019

Transaction Premium \$0.00	Escrow Amount \$0.00	Taxes, Fees, Surcharges \$0.00	Written Premium \$8,148.41	Commission \$0.00	Policy Period 03/27/2023 - 03/27/2024	Current Due \$0.00	Open Claims 0	Status In Force
-------------------------------	-------------------------	-----------------------------------	-------------------------------	----------------------	--	-----------------------	------------------	--------------------

**Choose Next Action**  
Endorse  
Inquire  
**Pending Cancellation**

**Applicant Information**  
Name: John Doe  
Address: 123 Main Street Cincinnati, OH 45206  
FEIN: Not Available  
Phone: Not Available

**Producer Information**  
Code: 0000000010  
Name: Test Producer  
Address: #144 Test St - Changed Plano, TX 75024  
Phone: (123) 456-7890

**Milestones Table:**

MILESTONE	REVISION	ACTIVITY	TRANSACTION EFFECTIVE DATE	STARTED ON	LAST MODIFIED	MODIFIED BY	STATUS	TRANSACTION PREMIUM	POLICY PREMIUM	REMARKS	CHANGE SUMMARY
Quote Q20230306000840-00	000	New Business Quote	03/27/2023	03/06/2023 09:47	03/06/2023 14:18	Agent Insurance	Converted to Policy	\$7,498.50	\$0.00		
Policy ATPP013090-0	000	Quote to Policy	03/27/2023	03/06/2023 14:26	03/08/2023 15:16	Agent Insurance	In Force	\$7,498.50	\$7,498.50		
Policy ATPP013090-0	009	Notice of Cancellation	03/27/2023	03/09/2023 11:11	03/09/2023 11:12	Agent Insurance	In Force (Pending Cancellation)	\$0.00	\$7,498.50	Insured Request	
Policy ATPP013090-0	016	Notice of Cancellation	03/28/2023	03/09/2023 11:16	03/09/2023 11:17	Agent Insurance	In Force (Pending Cancellation)	\$0.00	\$7,498.50	Insured Request	

Figure 2. Dashboard.

2. On the Policy screen, enter the **Transaction Effective Date**.

**NOTE:** The Transaction Effective Date cannot be backdated more than 3 days or future dated more than 120 days.

3. Select a **Cancel Reason** from the pop-up window.

**NOTE:** If the cancel reason is at the Insured's request, the policy can be cancelled the day of. If the cancel reason is Non-Payment of Premium, the system will submit a request to ODEN which would then return a date the policy can be legally cancelled.

**John Doe**  
POLICY: ATPP013090-0 REVISION: 021

**Choose Cancel Reason**

Description	Type	Subject To Audit
<a href="#">Insured Request</a>	Pro-rata	N
<a href="#">Insured Request</a>	Flat	N
<a href="#">Non Payment Of Premium</a>	Flat	N
<a href="#">Non Payment Of Premium</a>	Pro-rata	N

**Transaction Effective Date:** 03/01/2024  
**Notice Date:** 03/10/2023

Figure 3. Select a Cancel Reason.

- GREAT AMERICANINSURANCE GROUP

P&C Suite

Suite HomeReportsWorkbench

John DoePOLICY: ATPP013090-0 REVISION: 020

In Progress\$0.00StatusPremium

SearchATPP013090-0

ATPP013090-0
CoveragesOptional CoveragesVehicle Information (1)Drivers (1)EligibilityPremium Summary

Policy/Product Information

Product	Non Trucking Liability and Physical Damage
Company	Great American Assurance Company
Policy Type	Individual Owner / Operator
Term of Insurance	Annual
Effective Date	03/27/2023
Expiration Date	03/27/2024
Transaction Effective Date	04/03/2023
Remarks	

SAVE & RESUME LATERSAVE & CONTINUECALCULATE PREMIUMNEXT

© 2023 Majesco. All rights reserved, worldwide

6. Wait for the **Status** to update to **Ready for Booking**.

Figure 5. Dashboard with status update



7. Under Choose Next Action, click **Book**.

The screenshot shows the P&C Suite interface for John Doe. The policy is ATPP013090-0, revision 023. The status is 'Ready for Booking (Pending Cancellation)'. A red arrow points to the 'Book' button under the 'Choose Next Action' tab. The 'Applicant Information' and 'Producer Information' tabs are also visible.

Transaction Premium	Escrow Amount	Taxes, Fees, Surcharges	Written Premium	Commission	Policy Period	Current Due	Open Claims	Status	Cancel Eff Date
\$0.00	\$0.00	\$0.00	\$8,148.41	\$0.00	03/27/2023 - 03/27/2024	\$0.00	0	Ready for Booking (Pending Cancellation)	05/01/2023

MILESTONE	REVISION	ACTIVITY	TRANSACTION EFFECTIVE DATE	STARTED ON	LAST MODIFIED	MODIFIED BY	STATUS	TRANSACTION PREMIUM	POLICY PREMIUM	REMARKS	CHANGE SUMMARY
Quote Q20230306000840-00	000	New Business Quote	03/27/2023	03/06/2023 09:47	03/06/2023 14:18	Agent Insurance	Converted to Policy	\$7,498.50	\$0.00		
Policy ATPP013090-0	000	Quote to Policy	03/27/2023	03/06/2023 14:26	03/08/2023 15:16	Agent Insurance	In Force (Pending Cancellation)	\$7,498.50	\$7,498.50		
Policy ATPP013090-0	009	Notice of Cancellation	03/27/2023	03/09/2023 11:11	03/09/2023 11:12	Agent Insurance	In Force (Pending Cancellation)	\$0.00	\$7,498.50	Insured Request	

Figure 6. Book Cancellation

8. Wait for the **Status** to update to **In Force (Pending Cancellation)**.

The screenshot shows the P&C Suite interface for John Doe. The policy is ATPP013090-0, revision 021. The status is 'In Force (Pending Cancellation)'. A red arrow points to the 'Status' field. The 'Applicant Information' and 'Producer Information' tabs are also visible.

Transaction Premium	Escrow Amount	Taxes, Fees, Surcharges	Written Premium	Commission	Policy Period	Current Due	Open Claims	Status	Cancel Eff Date
\$0.00	\$0.00	\$0.00	\$8,148.41	\$0.00	03/27/2023 - 03/27/2024	\$0.00	0	In Force (Pending Cancellation)	05/01/2023

MILESTONE	REVISION	ACTIVITY	TRANSACTION EFFECTIVE DATE	STARTED ON	LAST MODIFIED	MODIFIED BY	STATUS	TRANSACTION PREMIUM	POLICY PREMIUM	REMARKS	CHANGE SUMMARY
Quote Q20230306000840-00	000	New Business Quote	03/27/2023	03/06/2023 09:47	03/06/2023 14:18	Agent Insurance	Converted to Policy	\$7,498.50	\$0.00		
Policy ATPP013090-0	000	Quote to Policy	03/27/2023	03/06/2023 14:26	03/08/2023 15:16	Agent Insurance	In Force (Pending Cancellation)	\$7,498.50	\$7,498.50		
Policy ATPP013090-0	009	Notice of Cancellation	03/27/2023	03/09/2023 11:11	03/09/2023 11:12	Agent Insurance	In Force (Pending Cancellation)	\$0.00	\$7,498.50	Insured Request	

Figure 7. Cancellation In Force.

# Direct Bill

## Trucking

### General Information

When doing Direct Bill for a policy, you will be required to enter the billing information on the Payment Plan tab of the dashboard.

Once you have converted a **Full Quote to a Policy**, follow the instructions for Direct Billing.

1. On the Payment Plan tab, if required, select a **Recurring Payment Method** from the drop-down menu. You can choose Check, Credit Card, or EFT.
2. Click **Make Down Payment**.

The screenshot shows the 'P&C Suite' dashboard for 'John Smith'. The 'POLICY: OAP013667-0' is displayed with a revision of '000'. A summary table shows Transaction Premium (\$1,980.00), Escrow Amount (\$0.00), Taxes, Fees, Surcharges (\$0.00), Written Premium (\$1,980.00), Commission (\$0.00), Policy Period (03/20/2023 - 03/20/2024), Current Due (\$0.00), Open Claims (0), and Status (Billing Information - Block). Below this, there are sections for 'Choose Next Action' (Inquire, Edit), 'Applicant Information' (Name: John Smith, Address: 123 3rd Street Cincinnati, OH 45202, FEIN: Not Available, Phone: Not Available), and 'Producer Information' (Code: 0000000010, Name: Test Producer, Address: #144 Test St - Chagrin Plano, TX 75024, Phone: (123) 456-7890). A red arrow points to the 'Payment Plan' tab in the navigation bar. Below the tabs, a form for 'Direct Bill' is visible with fields for Bill Type (Direct Bill), Payer (Insured - John Smith), Pay Plan (Direct Bill - Full Pay), Deposit Required (No), Recurring Payment Method (CHECK), Bill Cycle (Cut Off), and Cut Off Day (15). A red arrow points to the 'Recurring Payment Method' dropdown. A note states: 'NOTE: Installment Schedule does not include service charge (Installment Fees). Installment Fees of \$3 may be charged on each installment.' A red arrow points to the 'Make Down Payment' button. A 'View Transaction Amount Due' link and an 'Installment Schedule' link are also present. The footer shows '© 2023 Majesco. All rights reserved, worldwide'.

Figure 1. Payment Plan tab on the dashboard for Direct Bill.

3. In the Payment Details pop-up window, click **Make Down Payment** again.

The screenshot shows the 'Payment Details' pop-up window. It displays the 'Payment Method' as 'CC' and the 'Premium' as '1980'. Other fields include 'Escrow' (0), 'Taxes, Fees, Surcharges' (0), 'Payments Collected' (0), and 'Amount Due' (1980). There is a checkbox for 'Other Amount'. A red arrow points to the 'Make Down Payment' button. The background shows the same dashboard as Figure 1, with a red arrow pointing to the 'Make Down Payment' button in the background.

Figure 2. Payment Details pop-up window.



4. In the **MAKE A PAYMENT** pop-up window, click **REVIEW**.

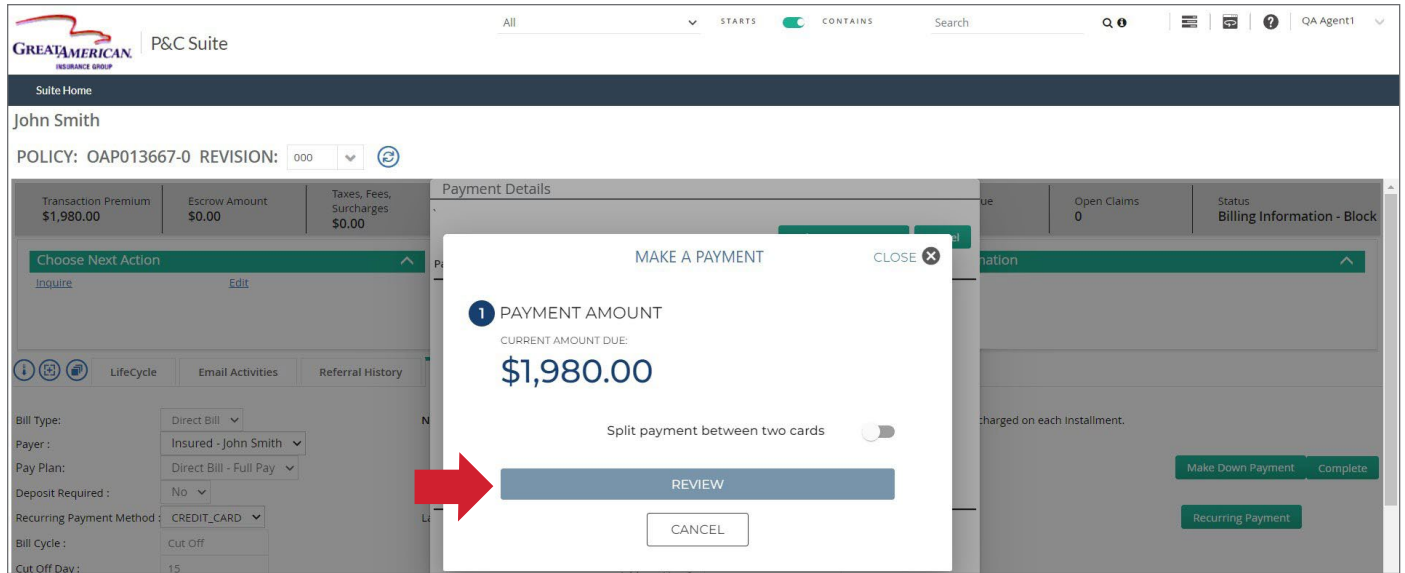


Figure 3. Make a payment window.

5. Enter the information for the Credit Card, Check, or EFT as required. In this example, we are entering credit card information.

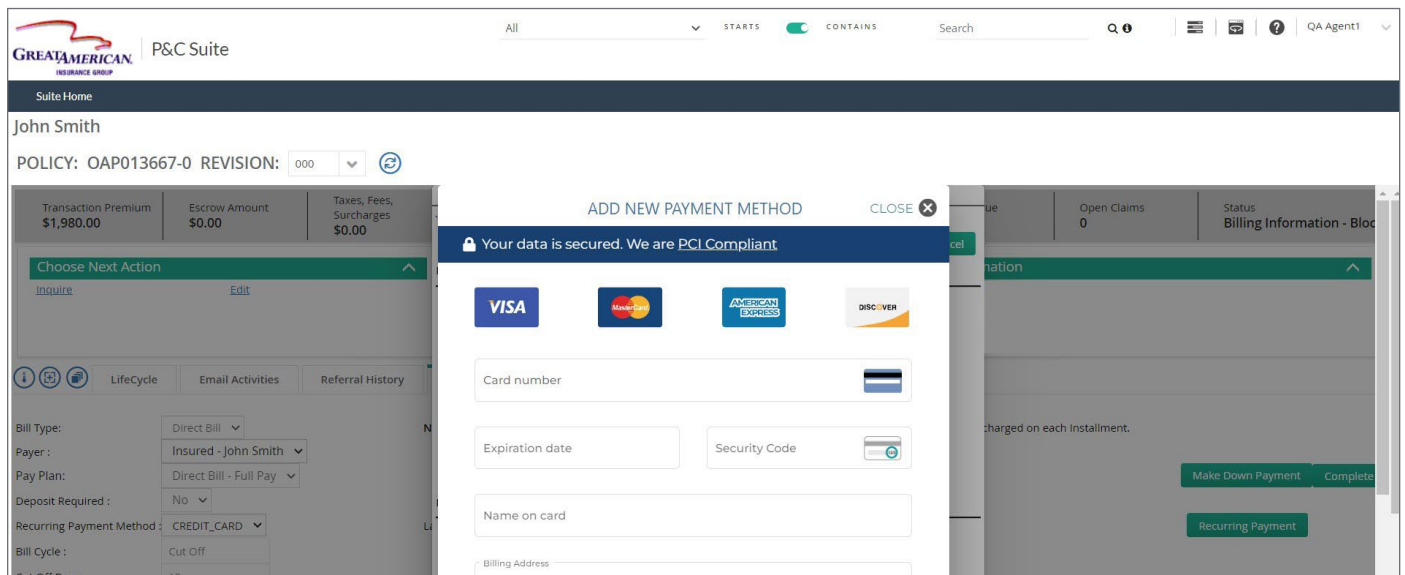



Figure 4. Add New Payment Method window.

6. When finished, click **REVIEW**.

7. On the next screen, click **PAY**. If the payment is accepted, you will receive a confirmation screen with the policy number, payment amount, and transaction number. You also have the ability to send a receipt via email.

8. Once the payment box closes, click **COMPLETE**.

 P&C Suite

Suite Home

John Smith

POLICY: ATPP016200-0 REVISION: 000

Transaction Premium	Escrow Amount	Taxes, Fees, Surcharges	Written Premium	Policy Period	Current Due	Open Claims	Status
\$2,028.00	\$0.00	\$0.00	\$2,028.00	05/23/2023 - 05/23/2024	\$0.00	0	Billing Information - Block

**Choose Next Action**  
[Inquire](#) [Edit](#)

**Applicant Information**  
Name: John Smith  
Address: [301 E Fourth Street Cincinnati, OH 45202](#)  
FEIN: Not Available  
Phone: Not Available

**Producer Information**  
Code: 0000000010  
Name: Test Producer  
Address: [#144 Test St - Changed Plano, TX 75024](#)  
Phone: (123) 456-7890

LifeCycle | Email Activities | Referral History | **Payment Plan** | Forms | UW Rules | Claims

Bill Type: Direct Bill  
Payer: Insured - John Smith  
Pay Plan: Direct Bill - Full Pay  
Deposit Required: No  
Recurring Payment Method: CREDIT\_CARD  
Bill Cycle: Pro-rata  
Cut Off Day:  
[View Transaction Amount Due](#)  
[Installment Schedule](#)


NOTE: Installment Schedule does not include service charge (Installment Fees). Installment Fees of \$3 may be charged on each installment.

Last Four Digits of Credit Card: 1111 Expiry Date: 2027/5

[Make Down Payment](#) [Complete](#)  
[Recurring Payment](#)

Figure 5. Completing Down Payment.

9. Once the Down Payment has been made, click **BOOK**.

 P&C Suite

Suite Home

John Smith

POLICY: ATPP016200-0 REVISION: 000

Transaction Premium	Escrow Amount	Taxes, Fees, Surcharges	Written Premium	Policy Period	Current Due	Open Claims	Status
\$2,028.00	\$0.00	\$0.00	\$2,028.00	05/23/2023 - 05/23/2024	\$0.00	0	Ready for Booking

**Choose Next Action**  
[Book](#) [Inquire](#) [Edit](#)

**Applicant Information**  
Name: John Smith  
Address: [301 E Fourth Street Cincinnati, OH 45202](#)  
FEIN: Not Available  
Phone: Not Available

**Producer Information**  
Code: 0000000010  
Name: Test Producer  
Address: [#144 Test St - Changed Plano, TX 75024](#)  
Phone: (123) 456-7890

LifeCycle | Email Activities | Referral History | **Payment Plan** | Forms | UW Rules | Claims

[VIEW](#) [Download](#) [Refresh](#)

MILESTONE	REVISION	ACTIVITY	TRANSACTION EFFECTIVE DATE	STARTED ON	LAST MODIFIED	MODIFIED BY	STATUS	TRANSACTION PREMIUM	POLICY PREMIUM	REMARKS	CHANGE SUMMARY
<a href="#">Quote Q20230523003205-00</a>	000	New Business Quote	05/23/2023	05/23/2023 12:44	05/23/2023 12:52	Agent Insurance	Converted to Policy	\$2,028.00	\$0.00		
Policy ATPP016200-0	000	Quote to Policy	05/23/2023	05/23/2023 12:53	05/23/2023 13:01	Agent Insurance	Ready for Booking	\$2,028.00	\$2,028.00		

Release Version: © 2023 Majesco. All rights reserved, worldwide

Figure 6. Book Policy.

10.If monthly payments are required, set up a recurring payment method by clicking **RECURRING PAYMENT**.

John Smith  
POLICY: ATPP016200-0 REVISION: 000

Transaction Premium	Escrow Amount	Taxes, Fees, Surcharges	Written Premium	Policy Period	Current Due	Open Claims	Status
\$2,028.00	\$0.00	\$0.00	\$2,028.00	05/23/2023 - 05/23/2024	\$0.00	0	Ready for Billing Information

**Choose Next Action**  
[Inquire](#) [Edit](#)

**Applicant Information**  
Name: John Smith  
Address: 301 E Fourth Street Cincinnati, OH 45202  
FEIN: Not Available  
Phone: Not Available

**Producer Information**  
Code: 0000000010  
Name: Test Producer  
Address: #144 Test St - Changed Plano, TX 75024  
Phone: (123) 456-7890

LifeCycle | Email Activities | Referral History | **Payment Plan** | Forms | UW Rules | Claims

Bill Type: Direct Bill  
Payer: Insured - John Smith  
Pay Plan: Direct Bill - Full Pay  
Deposit Required: No  
Recurring Payment Method: CREDIT\_CARD  
Bill Cycle: Pro-rata  
Cut Off Day:  
[View Transaction Amount Due](#)  
Installment Schedule

NOTE: Installment Schedule does not include service charge (Installment Fees). Installment Fees of \$3 may be charged on each Installment.

Last Four Digits of Credit Card: 1111 Expiry Date: 2029/5

[Make Down Payment](#) [Complete](#)  
[Recurring Payment](#)

Release Version 2023 Majesco. All rights reserved, worldwide

Figure 7. Recurring Payment.

11. Review the billing details and click **CREATE PAYMENT PROFILE**.

John Smith  
POLICY: ATPP016200-0 REVISION: 000

Transaction Premium	Escrow Amount	Taxes, Fees, Surcharges
\$2,028.00	\$0.00	\$0.00

**Choose Next Action**  
[Inquire](#) [Edit](#)

**Applicant Information**  
Name: John Smith  
Address: 301 E Fourth Street Cincinnati, OH 45202  
FEIN: Not Available  
Phone: Not Available

**Producer Information**  
Code: 0000000010  
Name: Test Producer  
Address: #144 Test St - Changed Plano, TX 75024  
Phone: (123) 456-7890

LifeCycle | Email Activities | Referral History | **Payment Plan** | Forms | UW Rules | Claims

Bill Type: Direct Bill  
Payer: Insured - John Smith  
Pay Plan: Direct Bill - Full Pay  
Deposit Required: No  
Recurring Payment Method: CREDIT\_CARD  
Bill Cycle: Pro-rata  
Cut Off Day:  
[View Transaction Amount Due](#)  
Installment Schedule

NOTE: Installment Schedule does not include service charge (Installment Fees). Installment Fees of \$3 may be charged on each Installment.

Last Four Digits of Credit Card: 1111 Expiry Date: 2029/5

[Make Down Payment](#) [Complete](#)  
[Recurring Payment](#)

Release Version 2023 Majesco. All rights reserved, worldwide

**Payment Details**  
Payment Method: CC  
Billing Address:  
Reset Address: ☐  
Address Line 1\*: 301 E Fourth Street  
Address Line 2: GAT-26N  
City\*: Cincinnati  
State\*: Ohio  
Country: USA  
Zip Code\*: 45202  
Email Id:  
Phone No: 5555551234

Figure 8. Create Payment Profile pop-up window.

12. Review payment details and click **SUBMIT**.

Great American Insurance Group | P&C Suite

Suite Home

John Smith

POLICY: ATPP016200-0 REVISION: 000

Choose Next Action: Inquire, Edit

LifeCycle, Email Activities, Referral History

Bill Type: Direct Bill  
Payer: Insured - John Smith  
Pay Plan: Direct Bill - Full Pay  
Deposit Required: No  
Recurring Payment Method: CREDIT\_CARD  
Bill Cycle: Pro-rata  
Cut Off Day: View Transaction Amount Due  
Installment Schedule

Expiration date: 05/29  
Name on card: John Smith  
Billing Address: 301 E Fourth Street, GAT-26N, Cincinnati, OH, USA  
Billing Zip: 45202

SUBMIT, CANCEL

Release Version © 2023 Majesco. All rights reserved, worldwide

Figure 9. Review Payment Details pop-up window.

13. Click **SAVE PAYMENT METHOD**.

Great American Insurance Group | P&C Suite

Suite Home

John Smith

POLICY: ATPP016200-0 REVISION: 000

Choose Next Action: Inquire, Edit

LifeCycle, Email Activities, Referral History

Bill Type: Direct Bill  
Payer: Insured - John Smith  
Pay Plan: Direct Bill - Full Pay  
Deposit Required: No  
Recurring Payment Method: CREDIT\_CARD  
Bill Cycle: Pro-rata  
Cut Off Day: View Transaction Amount Due  
Installment Schedule

Expiration date: 05/29  
Name on card: John Smith  
Billing Address: 301 E Fourth Street, GAT-26N, Cincinnati, OH, USA  
Billing Zip: 45202

SAVE PAYMENT METHOD, GO BACK

Release Version © 2023 Majesco. All rights reserved, worldwide

Figure 10. Save Payment Details pop-up window.

14. Once the recurring payment box closes, click **COMPLETE**.

**John Smith**  
POLICY: ATPP016200-0 REVISION: 000

**Choose Next Action**  
Inquire Edit

**Applicant Information**  
Name: John Smith  
Address: 301 E Fourth Street Cincinnati, OH 45202  
FEIN: Not Available  
Phone: Not Available

**Producer Information**  
Code: 0000000010  
Name: Test Producer  
Address: #144 Test St - Changed Plano, TX 75024  
Phone: (123) 456-7890

LifeCycle Email Activities Referral History **Payment Plan** Forms UW Rules Claims

Bill Type: Direct Bill  
Payer: Insured - John Smith  
Pay Plan: Direct Bill - Full Pay  
Deposit Required: No  
Recurring Payment Method: CREDIT\_CARD  
Bill Cycle: Pro-rata  
Cut Off Day: View Transaction Amount Due

NOTE: Installment Schedule does not include service charge (Installment Fees). Installment Fees of \$3 may be charged on each installment.

Last Four Digits of Credit Card: 1111 Expiry Date: 2029/5

Make Down Payment **Complete**  
Recurring Payment

INSTALLMENT	DUE DATE	PREMIUM DUE	TOTAL AMOUNT
D	07/03/2023	\$2,028.00	\$2,028.00

Release Version 2023 Majesco. All rights reserved, worldwide

Figure 11. Completing Recurring Payment.

15. Once the recurring payment has been completed, click **BOOK**.

**John Smith**  
POLICY: ATPP016200-0 REVISION: 000

Transaction Premium	Escrow Amount	Taxes, Fees, Surcharges	Written Premium	Policy Period	Current Due	Open Claims	Status
\$2,028.00	\$0.00	\$0.00	\$2,028.00	05/23/2023 - 05/23/2024	\$0.00	0	Ready for Booking

**Choose Next Action**  
Book Inquire Edit

**Applicant Information**  
Name: John Smith  
Address: 301 E Fourth Street Cincinnati, OH 45202  
FEIN: Not Available  
Phone: Not Available

**Producer Information**  
Code: 0000000010  
Name: Test Producer  
Address: #144 Test St - Changed Plano, TX 75024  
Phone: (123) 456-7890

LifeCycle **Payment Plan** Email Activities Referral History Forms UW Rules Claims

VIEW

MILESTONE	REVISION	ACTIVITY	TRANSACTION EFFECTIVE DATE	STARTED ON	LAST MODIFIED	MODIFIED BY	STATUS	TRANSACTION PREMIUM	POLICY PREMIUM	REMARKS	CHANGE SUMMARY
Quote Q20230523003205-00	000	New Business Quote	05/23/2023	05/23/2023 12:44	05/23/2023 12:52	Agent Insurance	Converted to Policy	\$2,028.00	\$0.00		
Policy ATPP016200-0	000	Quote to Policy	05/23/2023	05/23/2023 12:53	05/23/2023 13:01	Agent Insurance	Ready for Booking	\$2,028.00	\$2,028.00		

Release Version 2023 Majesco. All rights reserved, worldwide

Figure 12. Booking Policy after setting up the Recurring Payment.