

Generating Proposals at the Account Level

End users will click **On Demand** from the policy list screen and then select **Proposal** to get the merge process started.

When merging a proposal at the Account Level, the order in which user selections are made matter.

1 Be sure to have the policy with the most lines highlighted before clicking the On Demand button. This will save a click or two.

2 On Demand

3 Proposal

CPKG	06/01/2017	06/01/2018	CPP 28489135		Commercial Package
BAUT	Renewal	06/01/2017	06/01/2018	CPP 28489135	D CHUGR1 Commercial Package
EQFL	Renewal	06/01/2017	06/01/2018	CPP 28489135	D CHUGR1 Commercial Package
GLIA	Renewal	06/01/2017	06/01/2018	CPP 28489135	D CHUGR1 Commercial Package
PROP	Renewal	06/01/2017	06/01/2018	CPP 28489135	D CHUGR1 Commercial Package
EPLI	Renewal	06/01/2017	06/01/2018	CPP 28489135	D CHUGR1 Commercial Package

4 Choose all additional lines as the first thing when the Proposal window opens.

5 Language English (United States of Amer)

6 ~Named Ins & Location Sche.. None

7 Change Line Association

8 Contact: Mr. Bob Cromer, Owner, Primary Contact

9 Suppress blank templates Page break Yes No

10 Finish

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