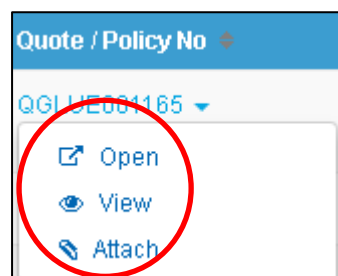


Edge Underwriting BROKER WORKBENCH user hints

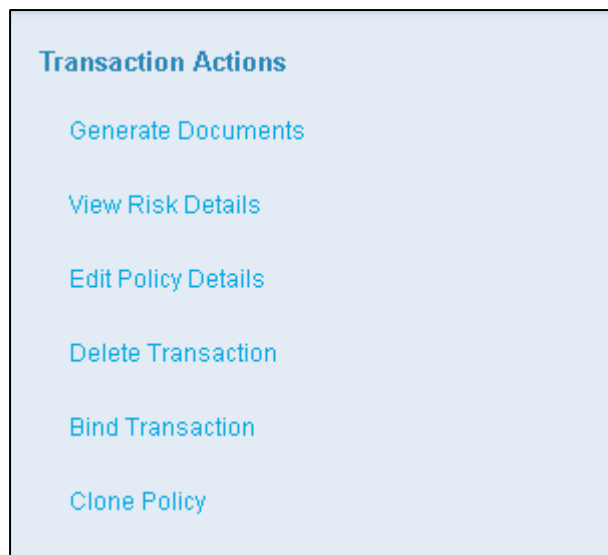
Always use **GOOGLE CHROME** to access the Edge workbench



To access Quote / Policy



Click on Quote / Policy number and select appropriate option



Generate Documents CLICK to obtain quotations, endorsements.

View Risk Details CLICK to view the risk information. Note no changes can be made via viewing.

Edit Policy Details CLICK to change or update policy information.

Delete Transaction CLICK if you want delete the transaction in entirety.

Bind Transaction CLICK to bind a quotation. Policy documentation, certificate of currency, invoices, and endorsements generated.

Clone Policy CLICK to clone a quotation completed. Allows alternative quotation options to be composed, eg, an alternative limit or different excess options, etc.

As many quote options can be generated as required

Save & Exit Abort Comments File Attachments Endorsement Clauses

Tool when in a Quote / Policy

Comments

Comments						
Commented By	Role	Comments	Date / Time	Transactions	Visibility	Actions
<div>+</div>						

Close Show Policy List

Comments tab allows you to add comments about an insured

CLICK +, populate and save

File Attachments

File Attachments							
Attached By	Role	File Name	Description	Date / Time	Transactions	Visibility	Actions
<div>+</div>							

Close Show Policy List

File Attachments tab allows you to add documents (quote slip, proposal form, claim report, photos, risk survey)

CLICK +, attach document, label and save

☐ Optional Extensions - Coverage

Back

Next

Optional coverages that
can be added to a
Quote / Policy