

Broker User Guide - Cloning a Quote

Cloning a Quote

The purpose of cloning a quote is so you can have multiple quotes under one opportunity. Cloning a quote will allow you to apply different plans and funding types. Cloning will keep all of the quotes grouped together under one opportunity.

A quote can be cloned from any status by clicking **Clone Quote**. You need to enter the effective date and plans from the **Plan Selection** page before you can proceed with cloning the quote. The remaining fields such as group information, contact details and census information is carried over from the original quote, however you have the flexibility to change any details as necessary. Once the quote is cloned, the quote status is set to **In Review if underwriting is required**.



The screenshot displays a quote management interface. At the top left, there is a green icon with a white 'Q' and the text 'Quote Acme Group 9/1/2021 John Broker'. In the top right corner, there are two buttons: 'Clone Quote' (highlighted with a red box) and 'Close Quote'. Below this, a table lists quote details:

| Quote Number | Expiration Date | Opportunity ID | Status | Total Price | Type |
|--------------|-----------------|---------------------|-----------|-------------|--------------|
| 00000863 | 8/31/2022 | Acme Group 9/1/2021 | In Review | \$0.00 | New Business |

At the bottom, a progress bar shows the quote's status: 'In Review' (highlighted in blue), 'Underwritten', 'Final Review', 'Closed', and 'Sold'.