

How to clone & renew submissions



HOW TO CLONE AND RENEW SUBMISSIONS

The purpose of this section is to show users what is required if you are needing to clone or renew a risk. **Step 1:** From the main homepage we can view a list of our team's risks.

UNDERSCORE David Turner
US Producing Broker

Welcome to Underscore,
the Digital Insurance Platform from McGill and Partners Create a New Quote

Your Risks

All	Draft	Submitted	Quoted	Quote Accepted	Bound	Not Taken Up	Quote Declined	Expired
SIT								
Contract Name	Product Type	Primary Owner	Creation Date	Last Update	Status	Action		
SIT Quote Version Creation	Terrorism	David Turner	25 Jan 2024	26 Jan 2024, 12:37	Submitted		Clone	Renew
SIT QV creation6	Terrorism	Drashti Client	25 Jan 2024	26 Jan 2024, 12:34	Quoted	ACTION NEEDED	Clone	Renew
SIT QV creation5	Terrorism	David Turner	25 Jan 2024	25 Jan 2024, 11:40	Submitted		Clone	Renew
SIT Quote Version creatio...	Terrorism	David Turner	25 Jan 2024	25 Jan 2024, 11:37	Submitted		Clone	Renew
SIT Test Quote Version cr...	Terrorism	David Turner	25 Jan 2024	25 Jan 2024, 11:33	Submitted		Clone	Renew
SIT Test Quote Version cr...	Terrorism	David Turner	25 Jan 2024	25 Jan 2024, 11:30	Quoted	ACTION NEEDED	Clone	Renew
SIT Cargo Stock Premium...	Cargo	David Turner	24 Jan 2024	24 Jan 2024, 16:07	Quote Accepted	ACCEPTED	Clone	Renew
sit	Terrorism	David Turner	19 Jan 2024	19 Jan 2024, 16:12	Submitted		Clone	Renew
Tris Transit	Cargo	David Turner	12 Jan 2024	12 Jan 2024, 21:26	Bound	ACCEPTED	Clone	Renew
SIT Test Special Characte...	Construction	David Turner	12 Jan 2024	12 Jan 2024, 18:31	Submitted		Clone	Renew
Milakhi cargo SIT-200	Cargo	David Turner	8 Jan 2024	12 Jan 2024, 18:20	Quoted	ACTION NEEDED	Clone	Renew

'Clone' and 'Renew' buttons are visible on the right of the screen:

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Your Risks

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Tris Transit	Cargo	David Turner	12 Jan 2024	12 Jan 2024, 21:26	Bound	ACCEPTED	Clone	Renew

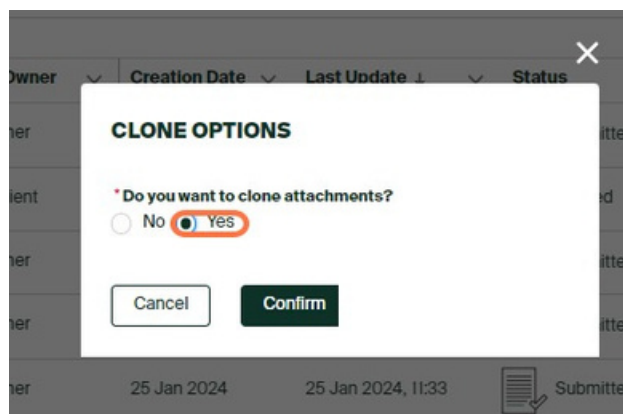


HOW TO CLONE AND RENEW SUBMISSIONS

Step 2: By selecting 'Clone' you will be presented with an options box pop up.

Creation Date	Status	Action
2024, 11:30	Quoted	ACTION NEEDED
2024, 16:07	Quote Accepted	ACCEPTED
2024, 16:12	Submitted	
2024, 21:26	Bound	ACCEPTED
2024, 18:31	Submitted	
2024, 18:30	Quoted	ACTION NEEDED

Step 3: Users now have the ability to add existing attachments from the risk.



Step 4: Once happy you can click confirm.



HOW TO CLONE AND RENEW SUBMISSIONS



Step 5: The page will auto refresh and your cloned risk will be located at the top of the list.

Your Risks

All	Draft	Submitted
SIT		
Contract Name	Product Type	Primary Owner
Iria Transi	Cargo	David Turner
SIT Quote Version Creation	Terrorism	David Turner

Step 6: If you click on the cloned risk you will see all of the original information has been copied, or 'cloned' into the relevant fields.



1. INSURED DETAILS

*Insured's Name
The Transit

*Line Address
The No Stock

City
The No Stock

*State
AZ - Arizona

*Country
USA

Supplier Lines Risk?

2. BUSINESS OVERVIEW

Contract Start Date
01/01/2024

*Contract End Date
01/01/2025

*Description of business and of the interest to be insured
The Transit

Website

Interest Types

Electronics Shipments Clothing & Textiles Lumber

This is relevant for all the information on the risk.

4. TRANSIT RISK

4.1 LIMITS

*Average value on any one contingency
USD \$

*Maximum value on any one contingency
USD \$

4.2 INCOMING VALUES

International

*% Contribution
0.00 %

*Amount subject to Transit
USD \$

*% of which shipped at Insured's risk of loss
0.00 %

Domestic

*% Contribution
0.00 %

*Amount subject to Transit
USD \$

*% of which shipped at Insured's risk of loss
0.00 %



HOW TO CLONE AND RENEW SUBMISSIONS

Step 7: The renew function is similar, with a few minor differences. By selecting 'Renew' you will be presented with an options box pop up.

Sound	ACCEPTED	Clone	Renew
Sound	ACCEPTED	Clone	Renew
Sound	ACCEPTED	Clone	Renew
Sound	ACCEPTED	Clone	Renew
Sound	ACCEPTED	Clone	Renew
Sound	ACCEPTED	Clone	Renew
Sound	ACCEPTED	Clone	Renew

Step 8: Not only do you have clone attachments, but you also have an 'Add 12 months to expiring date' option, which can be used for rolling annual renewals as an example.

RENEW OPTIONS

Do you want to clone attachments?

No Yes

Add 12 months to expiring dates?

No Yes

Cancel Confirm

Step 9: You click on confirm in the same way as you would 'Clone'. A new draft risk is then created.

RENEW OPTIONS

Do you want to clone attachments?

No Yes

Add 12 months to expiring dates?

No Yes

Cancel Confirm

HOW TO CLONE AND RENEW SUBMISSIONS



Step 10: Select the renewed risk in the list and navigate through to the main questionnaire page.

Your Risks

All	Draft	Submitted
Filter		
Contract Name	Product Type	Primary Owner
Testing Tria US	Cargo	David Turner

Step 11: You can see that the Contract Start Date has been modified to be 12 months into the future from the expiry date of the risk which is being renewed. You can now continue to either edit or submit the risk as you see fit.

2. BUSINESS OVERVIEW

*** Contract Start Date**

12/01/2025 *C

*** Description of business and of the Interest to be Insured**

Testing Tria US

Website

Website

Step 12: Whether Clone or Renew functions have been used, a draft will be created ready for you to edit if required before submitting to Insurers. It is important to carefully review the submission to ensure all accurate and correct as by submitting the risk you are confirming that.

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