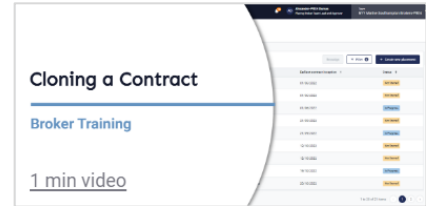


## Cloning

You can clone a Placement or a Contract on the Structure tab by selecting the ellipsis menu for the appropriate item and selecting **Clone Placement** or **Clone Contract**.

**Note:** for Renewals, it's recommended that you use the **Clone Placement** option, as this enables you to clone all the contracts within it and apply a new **Placement Effective Year**.



The Underwriters on the cloned contracts and sections don't get copied over to the new contracts and sections, but you can make them available for selection without having to search for them again, as explained below.

If you are cloning the whole placement:

1. Select the ellipsis menu for the placement and select **Clone Placement**.
2. On the Clone Placement screen, enter a **Placement Description** and on the **Placement Structure** tab, select the items in the structure that you wish to clone. All are selected by default.
3. On the **Underwriter Pool** tab, select the Underwriters that you want to be available for quick reselection from the Pool tab when adding the renewal Underwriters to the cloned contract.
4. Select **Clone**. The cloned placement will then appear.
5. In the new placement, select the contract then select the Underwriters tab. Select **+ Add Underwriter** and on the **Pool** tab choose which of the expiring contract's Underwriters to include.
6. Select **Add**.
7. Enter the Underwriters' proposed lines, and update the Data and Documents as required. Submit to Underwriters when ready.

Clone Placement
✕

● All Contracts within the cloned Placement will be created with an automatically generated Contract Reference. Please ensure these are updated.

Placement Description

Placement Structure
Underwriter Pool

	Underwriter	Company	
JR	JK-DEMO1 Rowling	HG Marine Risks-DEMO1	<input checked="" type="checkbox"/>
BE	Bernardine-DEMO1 Evaristo	BH UK Marine Risks-DEMO1	<input checked="" type="checkbox"/>
TM	Toni-DEMO1 Morrison	ABC Property Risks-DEMO1	<input checked="" type="checkbox"/>

Cancel
Clone

If you are cloning a contract but not the whole placement:

1. Select the ellipsis menu for the contract and select **Clone Contract**.
2. On the Clone Contract to a placement screen, in the **Contract reference** field enter or generate the contract reference.
3. Enter a **Contract description**.
4. In the **Contract destination** field, select the placement that you want this contract to be placed in. The field defaults to the current placement.

**Note:** As contracts are cloned to an existing placement, it may be preferable to clone the whole placement for renewals.

5. If the contract has sections, in the **Contract Structure** field, select the sections that you wish to clone.
6. Select **Clone**.

7. In the cloned contract, on the Underwriters tab select **+ Add Underwriter**. Find and select the required Underwriters.

**Note:** The **Pool** tab will contain the Underwriters who were on the contract used to create the clone.

8. Enter the Underwriters' proposed lines, and update the Data and Documents as required. Submit to Underwriters when ready.

Clone contract to a placement
✕

Contract reference

Generate Contract Reference

Contract description

Contract destination

13/03 Sections ▾

Contract Structure

▾
Property Multi National

▾
UK
☑

▾
EEA - France
☑

Expand all
Collapse all
Cancel
Clone