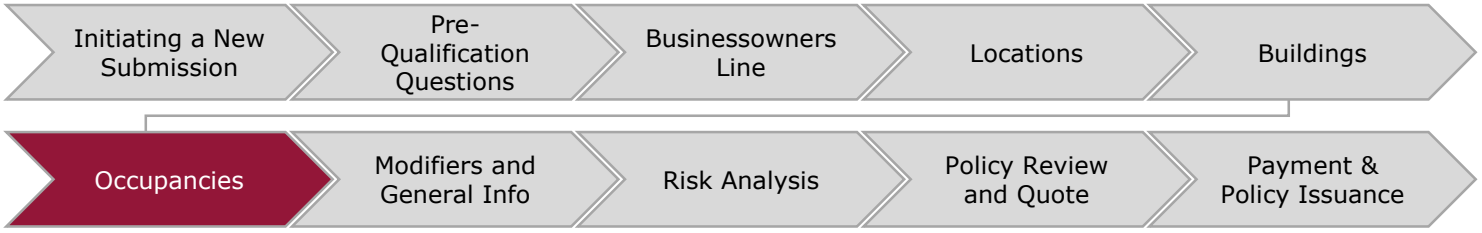
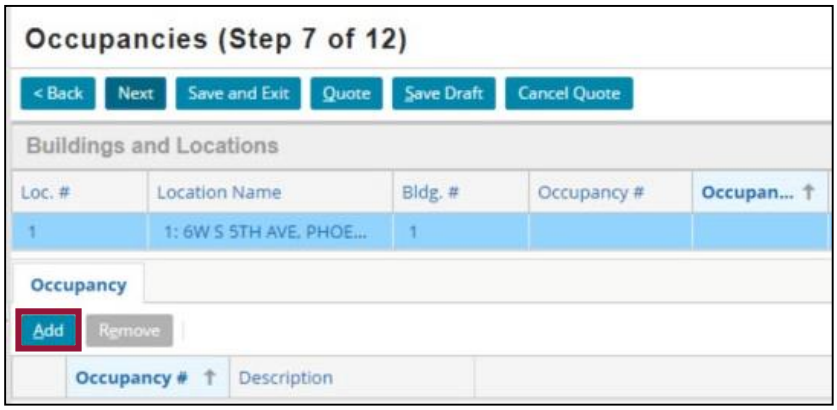
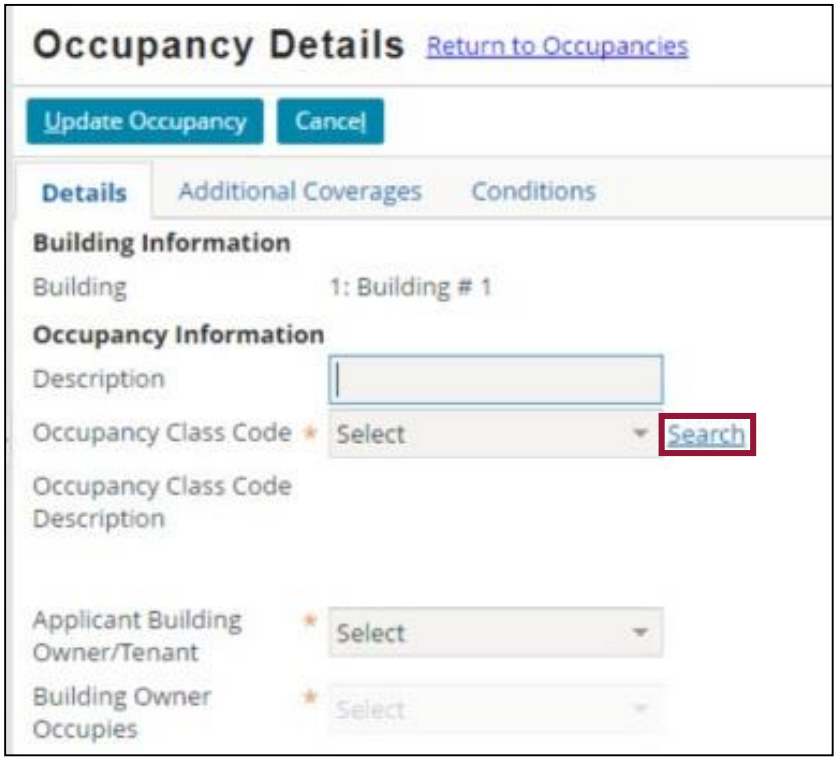
Quick Reference Guide

Deluxe BOP: Occupancies

Objective

This guide will take you through the process of updating Occupancies and coverages when quoting a Deluxe BOP.



Step	Action	Screenshot
1	On the **Occupancies** screen, click **Add**.	
2	You will be directed to the **Occupancy Details** screen. You may search for the applicable occupancy either by code or description. To search by Class Code, click the **Search** hyperlink.	

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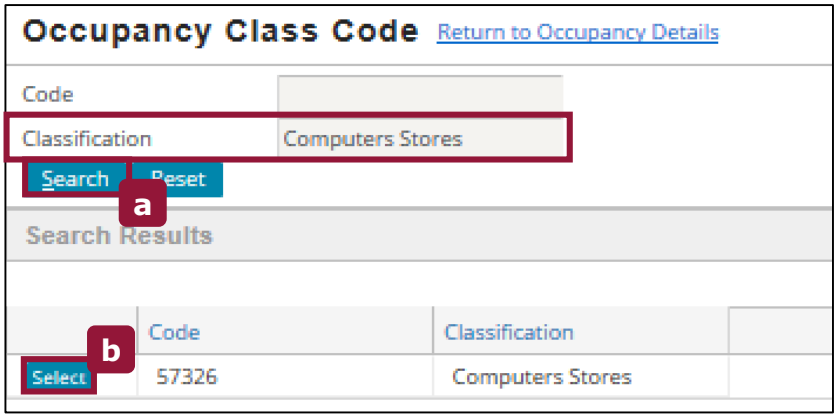
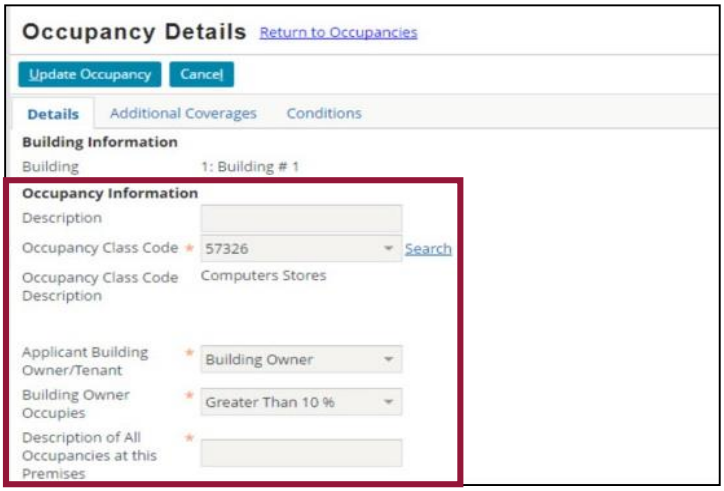
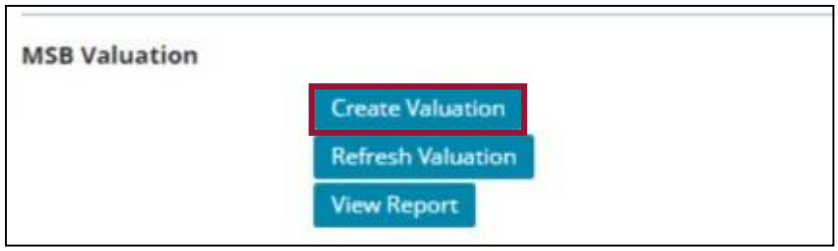
Step	Action	Screenshot
3	The **Occupancy Class Code** window will appear. a. Enter the applicable search criteria in the Classification field and click **Search** The search results are displayed in the lower half of the screen. b. Click **Select** to choose the applicable occupancy	
4	You will be redirected to the **Occupancy Details** screen. Populate the remaining fields in the **Occupancy Information** section.	
5	Scroll down to the MSB Valuation section. This is an optional tool available for the user to view the Replacement Cost and Actual Cash Value of the building. Click **Create Valuation**. Suggestions for Building Limits to be used are displayed. Review the **Replacement Cost Value** and **Actual Cash Value**.	

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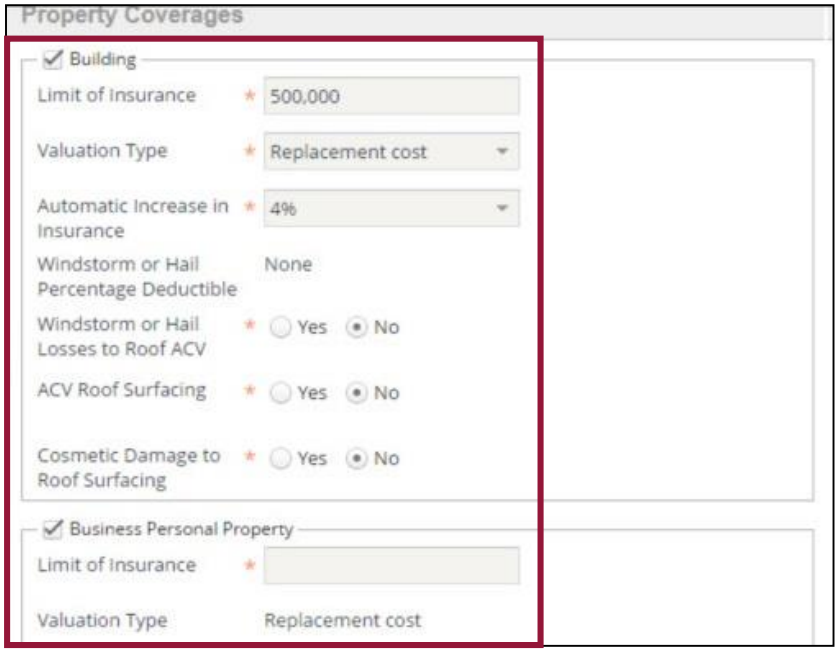
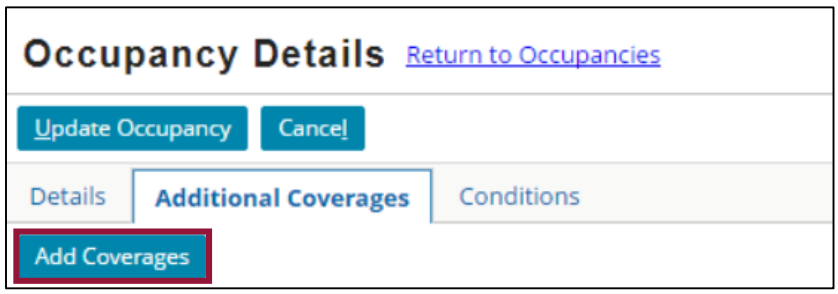
Step	Action	Screenshot
6	Under **Property Coverages**, select the applicable checkboxes to add relevant coverages. In this example, checking the **Building** checkbox reveals a set of fields where users may update building coverages and limits.	
7	Enter the total **Sales** at this Location in the **Liability** section.	
8	Scroll to the top of the screen and click the **Additional Coverages** tab to add more coverages.	
9	Click the **Add Coverages** button.	

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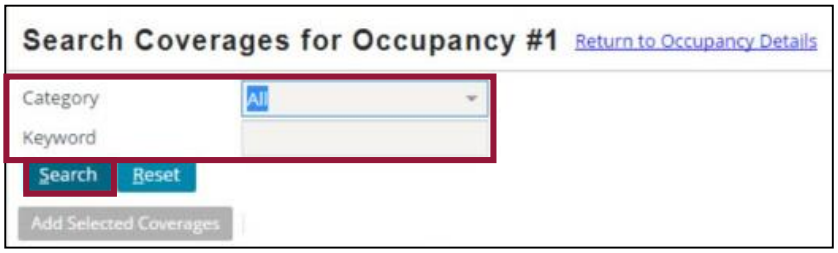
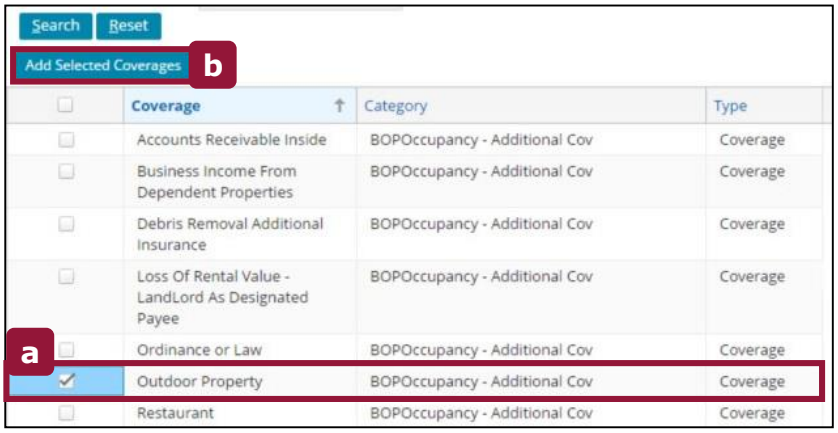
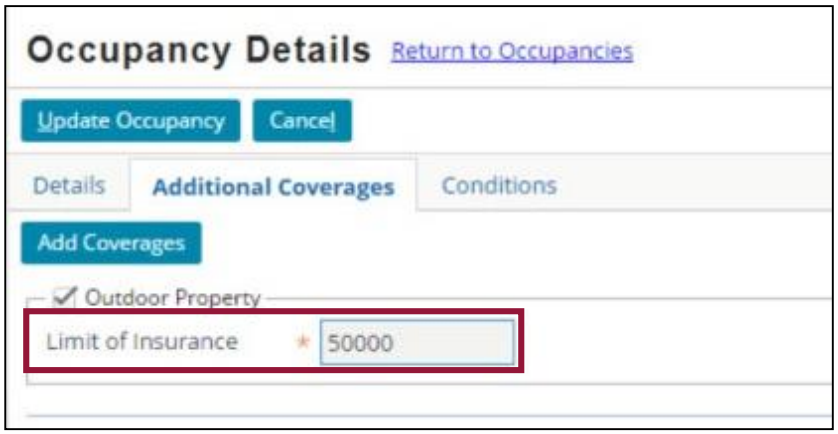
Step	Action	Screenshot
10	You will be directed to the **Search Coverages for Occupancy #1** screen. Enter applicable search criteria and click **Search**.	
11	The search results are displayed in the lower half of the screen. a. Check the applicable coverage b. Click the **Add Selected Coverages** button	
12	You will be redirected to the **Occupancy Details** screen. Enter the applicable **Limit of Insurance**.	
13	Click the **Conditions** tab.	

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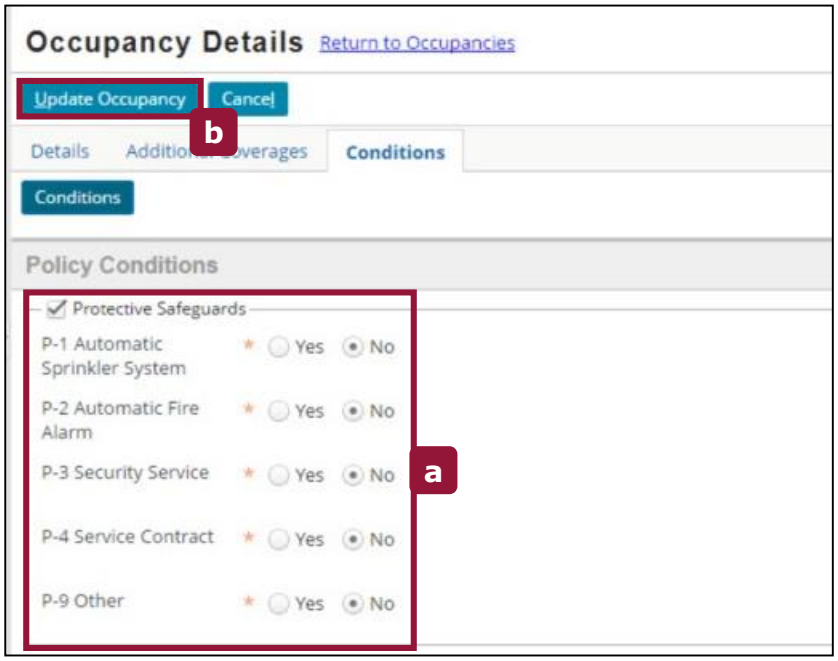
Step	Action	Screenshot
14	Protective Safeguards is not always indicated on every quote. a. Select applicable **Policy Conditions** and complete the required fields b. Click **Update Occupancy**	
15	You will be redirected to the **Occupancies** screen. Click **Next** to proceed. *Refer to the Deluxe BOP: Modifiers and General Info QRG next.*	