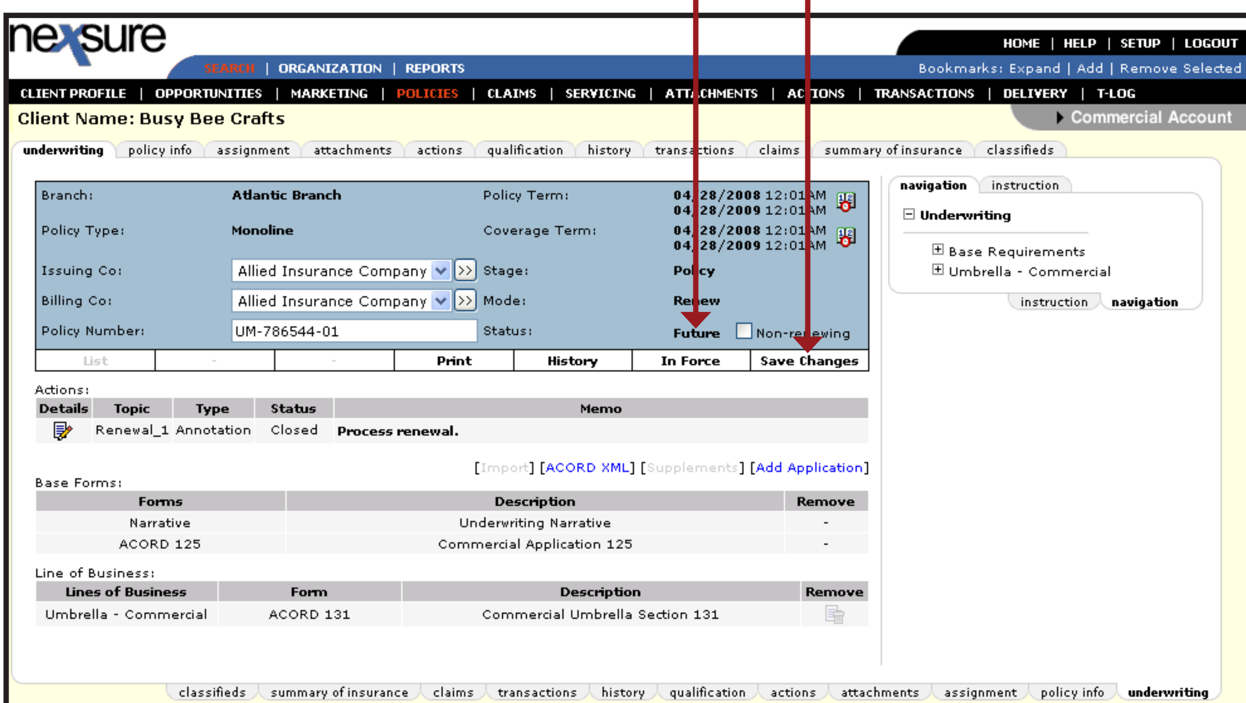

## In This Issue

- ✖ Save Changes to Update Forms with Policy Header Detail

# Populate the Term on Policy Forms

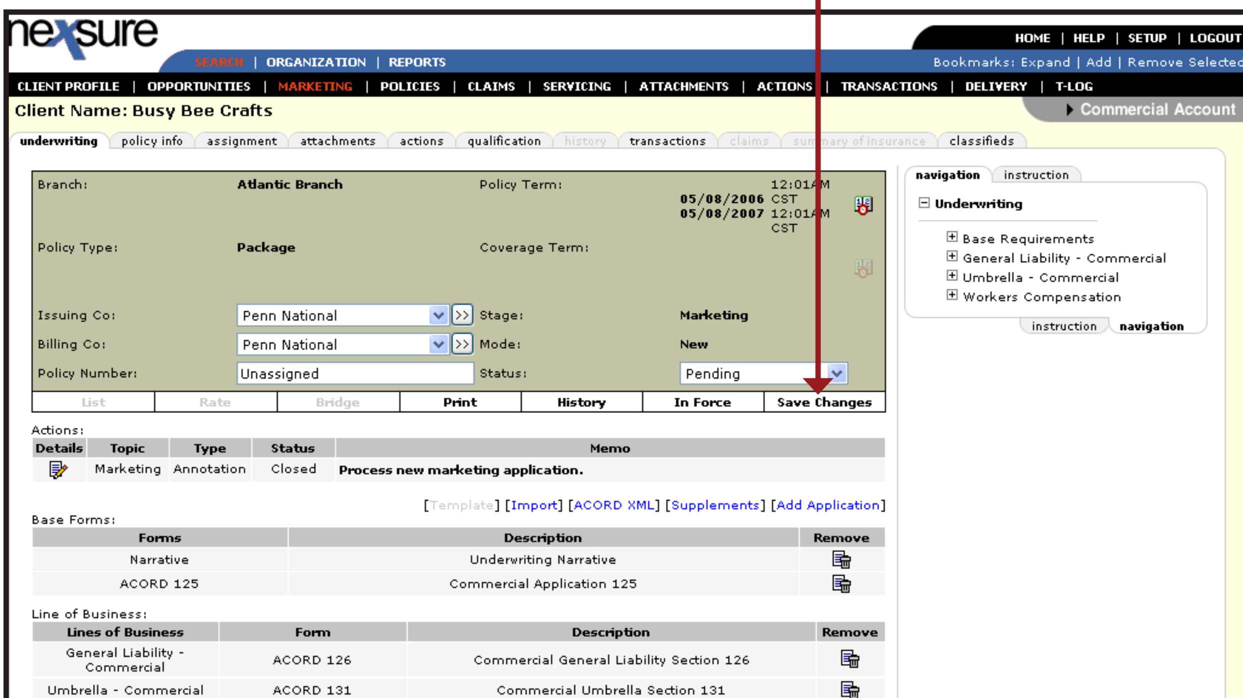
After a renewal is created, the policy status shows a **Future** status. To make sure the forms get updated with the correct carrier, policy number and policy term, check the header and update for the renewal. Whether any changes are made to the header or not, click the **Save Changes** link on the navigation toolbar. This is what updates the forms with the new carrier, policy number and policy term. If **Save Changes** is not clicked, the forms will retain the old carrier, policy number and term information.




**Note:** Changing the policy term requires that the coverage term also be changed. If the policy is in **Edit Pending** status and the header information is updated, the **Save Changes** link may be clicked immediately after the update to save and update the forms on the policy.


# Populate the Term on Marketing Records

Whenever information is modified in the header on the **MARKETING > underwriting** screen or a marketing record is created using the Servicing option of Market Existing (For more information, see **Re-Market an Existing Line of Business** in Chapter 13 of the Nexsure® CRM Training Manual), make sure to click the **Save Changes** link on the navigation toolbar. Clicking the **Save Changes** link will update the forms added to the marketing record with the carrier, policy number and term. If **Save Changes** is not clicked, the forms will retain the old carrier, policy number and term information.

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**Note:** If adding an application after clicking the **Save Changes** link and selecting the option in the application helper to copy another application, make sure to click the **Save Changes** link so it will not be necessary to update the newly added application manually with the carrier, policy number, and term.

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