

One. True. Partner.

Job Aid: Copy Claim Office Profile

Purpose	This job a	aid describes how to copy a Claim Office Profile.	
Copy Claim Office Profile	Use the t	following steps to copy a Claim Office Profile.	
	Step	Action	
	1	Go to Configure > Profiles . The Profiles screen displays.	
Search Results			
🕂 New Profile 👻 🗎	Import Profiles	😴 Refresh	
Claim Office	me	Company Code Office Code Type City	
IA Office		OCBI IA Location Huntingt	
inspection Facili	ity	AIGP Insurance Company	
📻 🛛 Repair Facility	6758	Tip! You can use the	
CCC1-IC1 TEST CON	MPANY-01	Copy Profile link instead!	
CCC1-IC1 TEST CON	MPANY-01 - CCC1	C1-IC1-CLAIM OFFICE 3 CCCT CERRITOS	
CCC1-IC1 TEST CON	MPANY-01 - CCC1	C1-IC1-OFFICE1 CCCT BC11 Claim Office CHICAGO	
🛍 CCC1-IC1 TEST COMPANY-01 - CC CCC CCC CCC CCC CC A Edit 🔯 Copy Data 📸 Copy Profile 🗙 Delete 🔊			
Note: This conies	New Profile	opens.	
all rates and	·		
settings except fo	or Insurance	ce Company: CCC1-IC1 TEST COMPANY-01	
Company	Office Co	code: CC (4)	
you can copy fro	m Copy Fro	om: Existing daim office for CCC1-IC1 TEST COMPANY-01	
one Insurance		CCC1-IC1 TEST COMPANY-01 - CCC1-IC1-CLAIM OFFICE 3	
Company to		Other existing daim office	
unomen			
		*	
		IA Location profile for OC'S BEST APPRAISERS 1	
		Create a blank profile	
		Next Cancel	
	3	Enter the Insurance Company name or select from droplist.	
	4	Enter the office code in the Office Code field.	

Continued on next page



Job Aid: Copy Claim Office Profile, Continued

Copy Claim Office Profile, continued

Step	Action
5	Click the Existing claim office for (insurance company claim office) and then select the claim office from the droplist.
6	Select the Claim Office Profile whose data you want to copy.
7	Click Next . The Claim Office Profile screen displays with the data copied over from the other Profile.
8	Update the data as needed for the new Claim Office Profile.
9	Click Save or Save and Close.