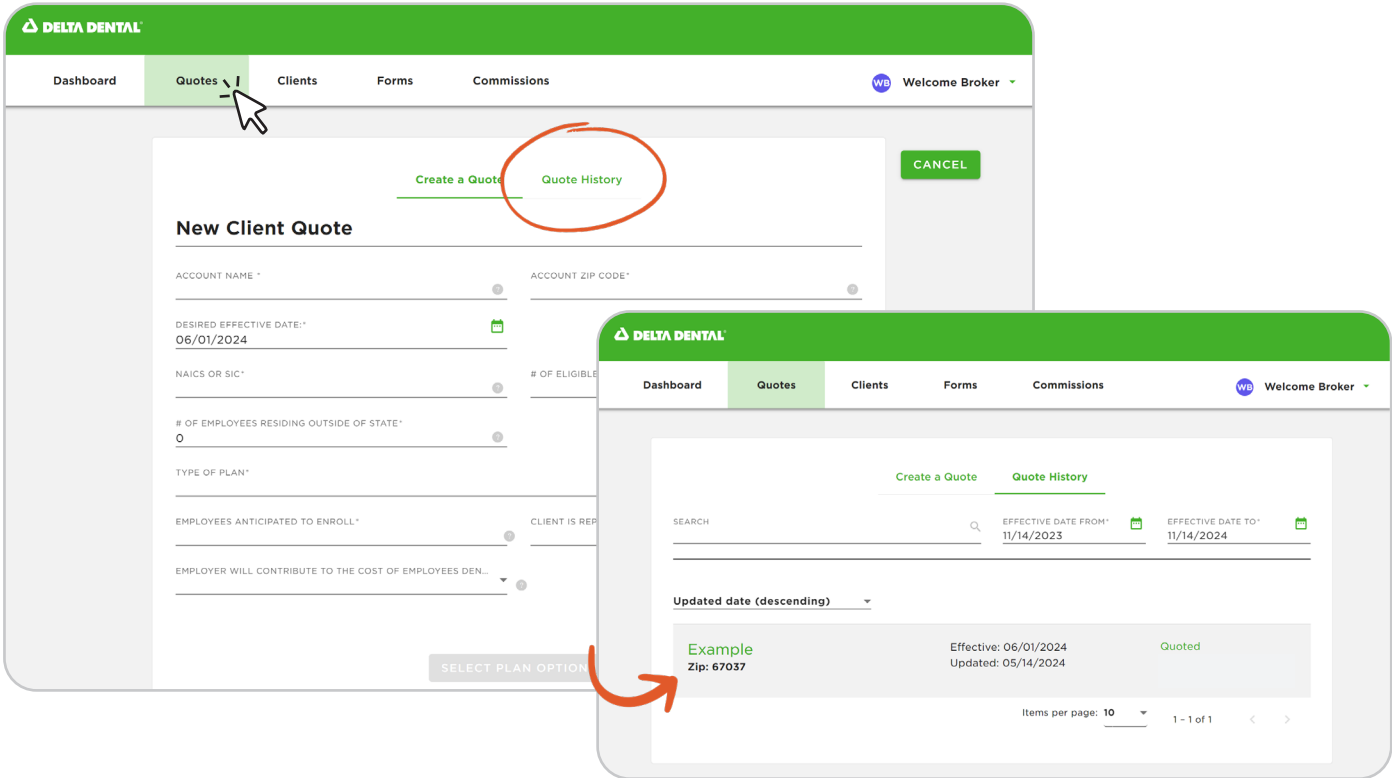


# Edit or Clone a Quote

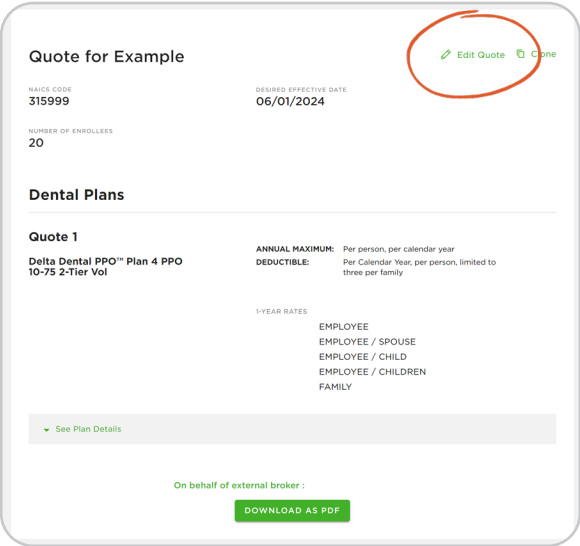
## Online Broker Account

### ★ How to Edit or Clone a Quote

1 In the **Quotes** tab, click **Quote History**. Click on the quote you would like to edit or clone.



2 To edit the quote, click **Edit Quote**.



# Edit or Clone a Quote

## Online Broker Account

### ★ How to Edit or Clone a Quote

3 You will be able to edit your quote or search for a new plan option. You can also remove plans from the quote by clicking **Remove From Quote** at the bottom of the screen. Once you make your edits, click **Save Quote**. You can view your new quote with any changes saved.

**New Client Quote**

ACCOUNT NAME \* Example ACCOUNT ZIP CODE \* 67037

DESIRED EFFECTIVE DATE \* 06/01/2024

NAICS OR SIC \* 315999 # OF ELIGIBLE EMPLOYEES \* 25

# OF EMPLOYEES RESIDING OUTSIDE OF STATE \* 0

TYPE OF PLAN \* Small Group Plans

EMPLOYEES ANTICIPATED TO ENROLL \* 20 CLIENT IS REPLACING OTHER DENTAL COV \* YES

EMPLOYER WILL CONTRIBUTE TO THE COST OF EMPLOYEES DEN \* NO

SELECT CURRENT CARRIER \* Blue Cross/Blue Shield of KS

**SELECT PLAN OPTIONS**

**Template Plan Options**

Template Configuration: No template selected

DIAGNOSTIC AND PREVENTIVE / TYPE I \* 100 BASIC / TYPE II \* 90

MAJOR / TYPE III \* 60 WILL D&P COUNT TOWARDS MAXIMUM \* No

COMPOSITE FILLINGS ON ALL TEETH \* COVERED ENDOODONTIC / PERIODONTIC \* Type II - Basic

FOR GROUPS 10-200 ONLY - INCLUDE IMPLANTS IN MAJOR \* Yes NO Ortho Benefits

WAITING PERIOD / ORTHO BENEFITS \* 0 mo. ORTHO LIFETIME MAXIMUM \* 1000

DOES THE CLIENT HAVE ORTHO WITH THEIR CURRENT CARRIER \* Yes 50 DEDUCTIBLE \* 5000

ANNUAL MAXIMUM \* 3000 NUMBER OF TIERS \* 2-Tier

PRODUCT \* PPO

**SEARCH PLANS**

**Dental Plans**

ANNUAL MAXIMUM: Per person, per calendar year

1 plan selected. Save as a quote? view all plans **SAVE QUOTE**

**Dental Plans**

Delta Dental PPO™ Plan 4 PPO 10-75 2-Tier Vol remove from quote

4 You can view your new quote with any changes saved.

**Quote for Example** Edit Quote Clone

NAICS CODE 315999 DESIRED EFFECTIVE DATE 06/01/2024

NUMBER OF ENROLLEES 20

**Dental Plans**

**Quote 1**

Delta Dental PPO™ Plan 4 PPO 10-75 2-Tier Vol

ANNUAL MAXIMUM: Per person, per calendar year

DEDUCTIBLE: Per Calendar Year, per person, limited to three per family

1-YEAR RATES

EMPLOYEE

EMPLOYEE / SPOUSE

EMPLOYEE / CHILD

EMPLOYEE / CHILDREN

FAMILY

See Plan Details

On behalf of external broker :

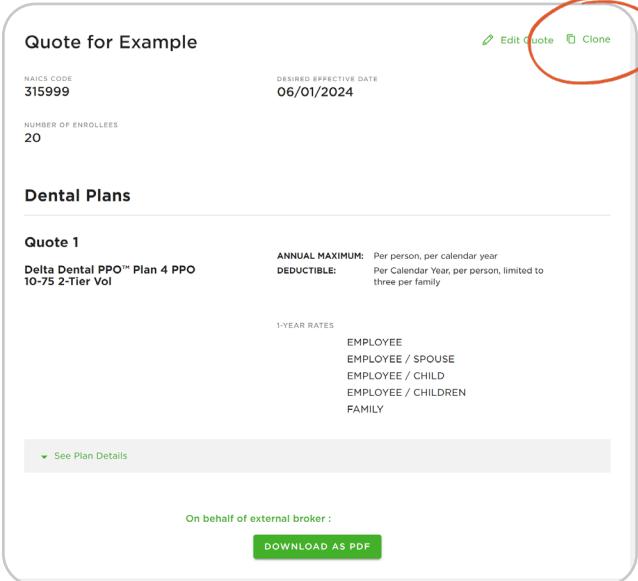
**DOWNLOAD AS PDF**

# Edit or Clone a Quote

## Online Broker Account

### ★ How to Edit or Clone a Quote

5 To clone a quote, click **Clone**.



Quote for Example

NAICS CODE: 315999      DESIRED EFFECTIVE DATE: 06/01/2024

NUMBER OF ENROLLEES: 20

**Dental Plans**

**Quote 1**

**Delta Dental PPO™ Plan 4 PPO 10-75 2-Tier Vol**

**ANNUAL MAXIMUM:** Per person, per calendar year  
**DEDUCTIBLE:** Per Calendar Year, per person, limited to three per family

1-YEAR RATES

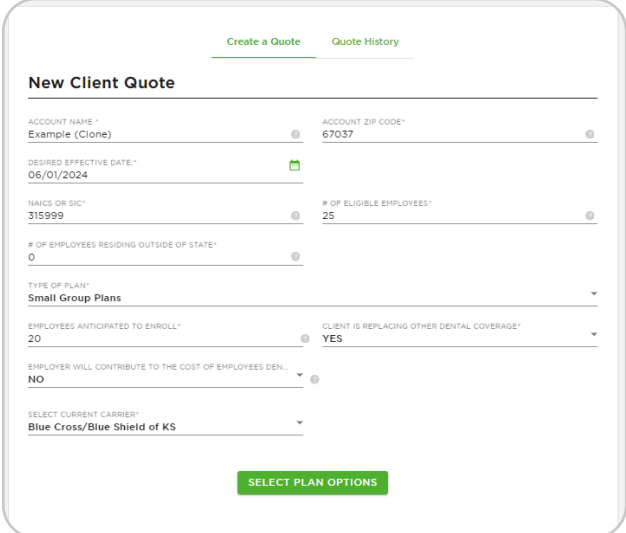
- EMPLOYEE
- EMPLOYEE / SPOUSE
- EMPLOYEE / CHILD
- EMPLOYEE / CHILDREN
- FAMILY

▼ See Plan Details

On behalf of external broker:

DOWNLOAD AS PDF

6 A clone of the quote will be made and you can edit any part to apply to the new quote. Once you make all the necessary adjustments, click **Save Quote**. You will see your new quote to view and download as a PDF.



Create a Quote      Quote History

**New Client Quote**

ACCOUNT NAME \*  
Example (Clone)

ACCOUNT ZIP CODE \*  
67037

DESIRED EFFECTIVE DATE \*  
06/01/2024

NAICS OR SIC \*  
315999

# OF ELIGIBLE EMPLOYEES \*  
25

# OF EMPLOYEES RESIDING OUTSIDE OF STATE \*  
0

TYPE OF PLAN \*  
Small Group Plans

EMPLOYEES ANTICIPATED TO ENROLL \*  
20

CLIENT IS REPLACING OTHER DENTAL COVERAGE \*  
YES

EMPLOYER WILL CONTRIBUTE TO THE COST OF EMPLOYEES DEN \*  
NO

SELECT CURRENT CARRIER \*  
Blue Cross/Blue Shield of KS

SELECT PLAN OPTIONS

# Edit or Clone a Quote

## Online Broker Account

### ★ How to Edit or Clone a Quote

6 Once you make all the necessary adjustments, click **Save Quote**.

**New Client Quote**

ACCOUNT NAME \*  
Example (Clone)

ACCOUNT ZIP CODE\*  
67037

DESIRED EFFECTIVE DATE\*  
06/01/2024

NAICS OR SIC\*  
315999

# OF ELIGIBLE EMPLOYEES\*  
25

# OF EMPLOYEES RESIDING OUTSIDE OF STATE\*  
0

TYPE OF PLAN\*  
Small Group Plans

EMPLOYEES ANTICIPATED TO ENROLL\*  
20

CLIENT IS REPLACING OTHER DENTAL COVERAGE\*  
YES

EMPLOYER WILL CONTRIBUTE TO THE COST OF EMPLOYEES DEN...  
NO

SELECT CURRENT CARRIER\*  
Blue Cross/Blue Shield of KS

**SELECT PLAN OPTIONS**

**Template Plan Options**

Template Configuration: [Use template as quote](#)

DIAGNOSTIC AND PREVENTIVE / TYPE I\*  
100

BASIC / TYPE II\*  
90

MAJOR / TYPE III\*  
60

WILL D&P COUNT TOWARDS MAXIMUM\*  
No

COMPOSITE FILLINGS ON ALL TEETH\*  
COVERED

ENDODONTIC / PERIODONTIC\*  
Type II - Basic

FOR GROUPS 10-200 ONLY - INCLUDE IMPLANTS IN MAJOR\*  
Yes

ORTHOBENEFITS / TYPE IV\*  
No Ortho Benefits

WAITING PERIOD / ORTHO BENEFITS\*  
0 mo.

ORTHOLIFETIME MAXIMUM\*  
1000

DOES THE CLIENT HAVE ORTHO WITH THEIR CURRENT CARRIER\*  
Yes

DEDUCTIBLE\*  
50

ANNUAL MAXIMUM\*  
3000

NUMBER OF TIERS\*  
2-Tier

PRODUCT\*  
PPO

**SEARCH PLANS**

**Dental Plans**

ANNUAL MAXIMUM: Per person, per calendar year

1 plan selected. Save as a quote? [view all plans](#) **SAVE QUOTE**

**Dental Plans**

Delta Dental PPO™ Plan 4 PPO 10-75  
2-Tier Vol [remove from quote](#)

7 You will see your new quote to view and download as a PDF.

**Quote for Example (Clone)** [Edit Quote](#) [Clone](#)

NAICS CODE  
315999

DESIRED EFFECTIVE DATE  
06/01/2024

NUMBER OF ENROLLEES  
20

**Dental Plans**

**Quote 1**

Delta Dental PPO™ Plan 4 PPO 10-75 2-Tier Vol

ANNUAL MAXIMUM: Per person, per calendar year

DEDUCTIBLE: Per Calendar Year, per person, limited to three per family

1-YEAR RATES

EMPLOYEE  
EMPLOYEE / SPOUSE  
EMPLOYEE / CHILD  
EMPLOYEE / CHILDREN  
FAMILY

[See Plan Details](#)

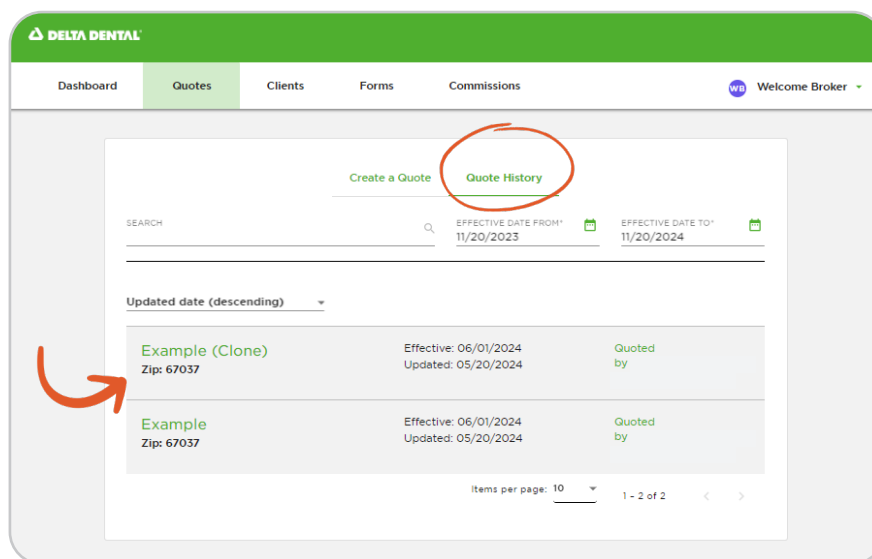
On behalf of external broker: **DOWNLOAD AS PDF**

# Edit or Clone a Quote

## Online Broker Account

### ★ How to Edit or Clone a Quote

8 You can view the new quote in the **Quote tab** under **Quote History**.



### ▶ Edit or Clone a Quote [Watch Video](#)

Watch this video to edit or clone a quote on the new online Broker Account.