Setting up Defaults - Pictures
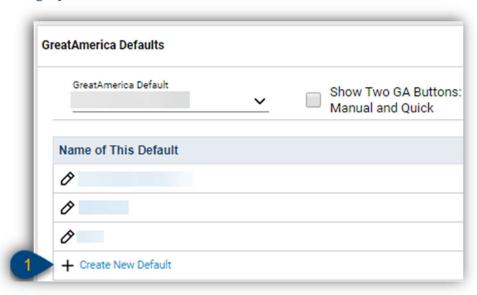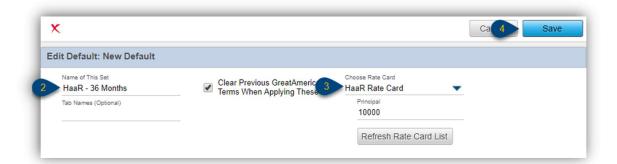

1. Click **Create New Default**
2. Name the **Set**
3. Choose the **Rate Card** from the drop down
4. Click **Save**

5. Select as many options to add to the default, though we recommend not more than two options per quote as to not give the customer too many options. Pick a **Group Name for New Options** and click **Preview Options**

6. **Optional**: Rename the **Term Option Name** field(s). We recommend naming them after your program name.
7. Click **Add Options**.
8. Click **Save** in the top right corner.