

On the Home page there are three sections of Products; **Commercial**, **Personal**, and **Offline***. For each product you have two options; **Information** or **Request Quote**.

* Most items under Offline are not actually quotable, check the Information page for more details.

The Information page contains specific details about the product. The various underlined sections will take you to different sections of the page or you may simply scroll down. One of these sections is **“Requirements for Quoting & Binding”** which gives instructions on quoting.

Request Quote opens the Quote Request Wizard. On Step 1 there are two questions. "What is the **primary state** of risk?" and "Who shall be the **Primary Contact**?" These will default to your state and your name unless you only have the CSR role in which case you will need to use the drop-down box to select someone identified as a Producer in our database.


Only a licensed agent may be the Primary Contact.

In South Carolina only an agent with a Broker License may be the Primary Contact.


The **Secondary Risk** button need only be used with the Affluent Program with multi-state risks.

Quote Request Wizard


State of Risk: Step 1

Select the Primary State of Risk for this Quote: 

Reminder: the State of Risk may not be changed after the request has been requested.

Secondary Risk 

Please select the agency Producer that is responsible for this quote request. The users that appear in this list are the Producers with verified licensing information on file. CSRs do have the ability to request a quote, however a licensed Producer needs to be identified here.

 Quote Primary Contact :


On Step 2 you may either **Select** an existing Consumer, **Search** for them, or **Add a New** one.

Quote Request Wizard


Select Consumer: Step 2

Select an existing Consumer record to proceed with quote

Company Name	Street Address	City	Zip
Test Co	123 ST	Alexandria	22314
Test123	test	test	22314
jh	lhjh	lhkjh	89898
j	j	hjjj	90909
Hulcher Agency	127 S. Peyton Street	Alex	22222
hh	3232	hh	98989
ewr	zdfsewfs	wer	12333
Pills	127 s peyton	asdasd	78787
abc company	111 main street	Omaha	12346
Kemper Open1	123 Golf Lane	Potomac	12345
Jewelers Coverage Test	5285 Shawnee Road	Alexandria	22312
Test Bank & Co.	123 S, MoneyPenny St.	Alexandria	22314
Test Friday	123 S	Alexandria	22314
Testing Inc.	123 S Peyton Street	Alexandria	22314
Test Co	123 st	alexandria	22314

To find more consumers, Enter Consumer Name: 

If you could not locate, click "Add New Consumer" Button.




If you selected an existing Consumer these fields will be blank. Otherwise you will just need to fill in the **Requested Effective Date**. If the Physical Address and Mailing Address are the same, just fill in the Physical Address and **select the Yes option** to automatically fill in Mailing Address.

Quote Request Wizard
Consumer Information: Step 3

Previous Cancel Save Next

Please enter the contact information for the consumer. A name and address are required values. Press 'Next' to continue.


Commercial

Requested Effective Date (mm/dd/yyyy) 

Applicant's Organization Name

Applicant's Physical Address

City, State & Zip Code , -

Is the Applicant's Mailing Address the same as the Physical Address? Yes No 

Applicant's Mailing Address

City, State & Zip Code , -

Applicant's Phone Number - -

Applicant's Fax Number - -

Applicant's Email Address

Previous Cancel Save Next

The next Step varies depending on the risk. **In all cases** you will need to get to the last page and click on **Submit** to create a Quote Detail page

1. For some products all the data is filled in online.
2. For some products some data is filled in online and then a button will either
 - a. Allow you to download a separate application/supplemental application(s) to be filled out and either
 - i. Attached to the Quote Detail page
 - ii. Faxed to Big "I" Markets and we will attach it for you
 - iii. Submitted to the underwriter directly (by fax or email)
 - b. Take you to the provider's website to submit data. Remember to return to the Quote Request Wizard and finish creating a Quote Detail page
3. For a select few products you will be asked a few questions and the underwriter will contact you directly complete the application.

If you have any process questions you may call out Technical Support Hotline at 703-647-7800 (M-F, 9-5 Eastern).

This is an example of a Quote Detail page. This will be used during the quoting process and during the life of the policy.

Quote Detail - 86364

Message Log

#	Subject	Author	Date & Time
1	Quote Requested	Producer, Test	4/16/2012 10:17 AM

Quote Version Version #1 (Current)

Quote Status Quote Requested

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State of Risk - Primary : Test

Product Information

Product Name: Company Test Product
Product Type: Commercial
Product Category: Commercial

Underwriter Contact Information

Name: Manager, Product

Please click on the image to contact the Underwriter



Fax Number: 7036837556

Agency Contact Information

Agency Name: Pills Test Agency
Primary Contact Name: Producer, Test
E-mail: monipillai@gmail.com
Address: 43455 Kips Sq
sq kiplingtona
Alexandria, AL 22314
703-6834422
333-3333333
Phone Number:
Fax Number:
Producer Code:
Producer Name: IIAA Agency Administrative
Services, Inc.
Sub-Producer Code: 313684

Consumer Contact Information

Commercial
Requested Effective Date: 12/31/2014
Commercial Name: Test Co
Physical Address: 123 ST
Alexandria, VA US 22314
Mailing Address: 123 ST