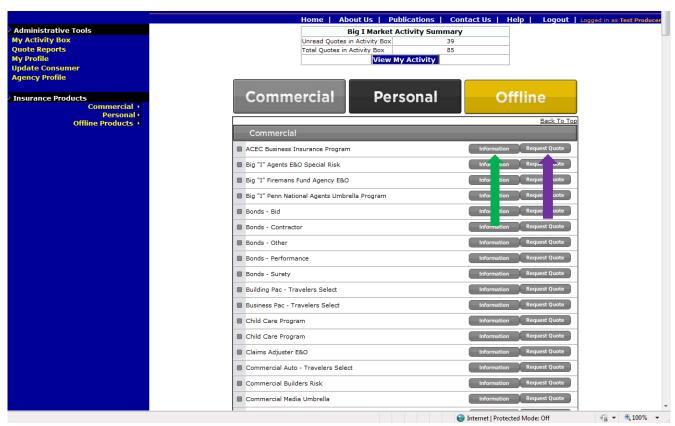
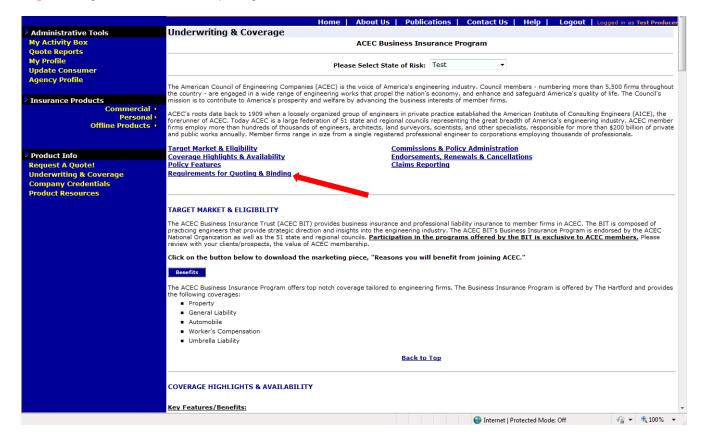
On the Home page there are three sections of Products; **Commercial**, **Personal**, and **Offline***. For each product you have two options; **Information** or **Request Quote**.



^{*}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.

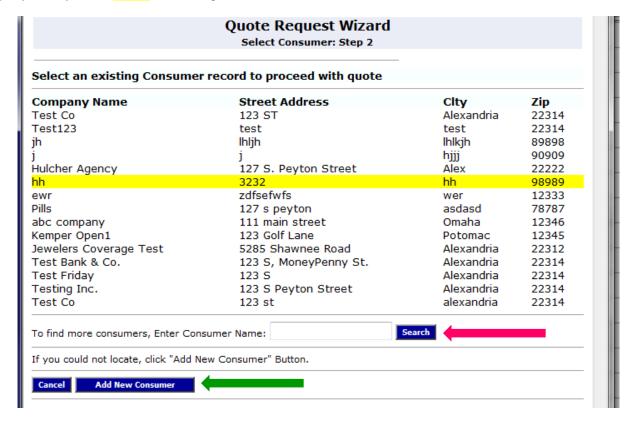
Only a licensed agent may be the Primary Contact.

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

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



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



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.

	Consumer Information: Step 3		
Previou	us Cancel Save Next		
Please enter the contact informatio 'Next' to continue.	n for the consumer. A name and address are required values. Press		
Commercial			
Requested Effective Date (mm/dd/yyyy)	—		
Applicant's Organization Name	TestCo		
Applicant's Physical Address	123 ST		
City, State & Zip Code	Alexandria , Virginia → 22314 -		
Is the Applicant's Mailing Address the sam	e as the Physical Address? O Yes O No		
Applicant's Mailing Address	123 ST		
City, State & Zip Code	Alexandria , Virginia ▼ 22314 -		
Applicant's Phone Number	123 - 456 - 7899		
Applicant's Fax Number	123 - 456 - 7899		
Applicant's Email Address			

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 Deta	ail - 86364					
lessage Log						
	#	Subject	Author	Date & Time		
	1 Quote Reque	sted	Producer, Test	4/16/2012 10:17 AM		
	Version #1 (Curren					
uote Status	Quote Requested	Tell us wh	at you think! Survey			
				State of Risk - Primary : Test		
Product Infor	mation					
Product Name:				Company Test Product		
Product Type:				Commercial		
Product Catego	Commercial					
Underwriter C	Contact Informatio	on				
Name:				Manager, Product		
Please click on	the image to contac	t the Underwriter				
Fax Number:				7036837556		
Agency Conta	ct Information					
Agency Name:				Pills Test Agency		
rimary Contac	Producer, Test					
-mail:				monipillai@gmail.com		
Address:				43455 Kips Sq sq kiplingtona Alexandria, AL 22314		
Phone Number:				703-6834422		
ax Number:				333-333333		
Producer Code:				555 555566		
Producer Name				IIAA Agency Administrative Services, Inc.		
Sub-Producer C	Code:			313684		
Consumer Cor	ntact Information					
Commercial						
Requested Effec	ctive Date:			12/31/2014		
Commercial Na				Test Co		
Physical Address:				123 ST Alexandria, VA US 22314		
Mailing Address				123 ST		