QuickQuote

This job aid provides step-by-step directions to create a quote using the QuickQuote system. The steps below assume that you have signed on to the system and that your agency is registered.

Search and/or Create the Account

Begin at the **Home** screen to search for or create an account.

Account Search

Your agency may have many accounts in the system. To avoid duplicating an existing account, the best practice is to search first to determine if the account already exists.
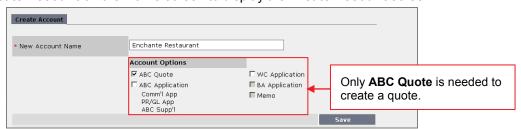
Follow these steps:

1. Select the criterion by which to search from the **Search By** drop-down list. You can search for accounts by producer code, producer name, account name, or effective date.
2. Enter the text by which to search in the **Search Text** field. An asterisk (*) wildcard may be used in the **Search Text** field so that you don't have type the full account name. For example, type **Restaurant*** to pull up accounts beginning with Restaurant and ***Terry** to pull up accounts ending with Terry.
3. Click the magnifying glass icon to begin the search.
4. If the search results display the correct account, select the account, and then skip to the section *Account Selection*, otherwise proceed to the following section, *Account Creation*.

Account Creation

Create a new account name for the customer or entity and identify the quote or policy options that you are completing.

Follow these steps:

1. Click **Create Account** on the **Home** screen to display the **Create Account** screen.

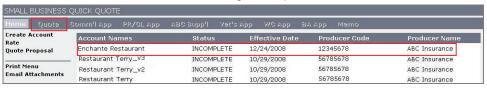Type the new account name in the **New Account Name** field, taking care not to duplicate an existing account name.
2. Click **ABC Quote** (American Business Coverage).
3. Click **Save** to save your entries and return to the **Home** screen.

Account Selection

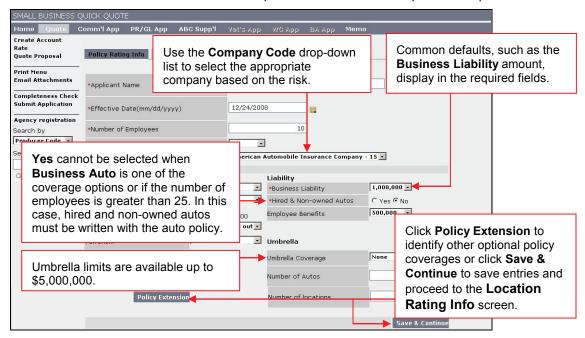Select the account from the **Home** screen to begin the quote.

Follow these steps:

1. Select (click) the account name from the displayed list. The tabs available for entry will be enabled (will no longer be grayed out).
2. Click **Quote** in the **Menu** bar to display the **Quote** screens.

Complete the Quote

Policy Rating Information

Use the **Quote** screens to enter rating information for the policy and individual locations to be quoted for this account. Both screens must be completed for QuickQuote to produce a quote.

Follow these steps:

1. Complete the required fields identified by red asterisks. Many required fields display common default values that may be changed as needed.
2. Do one of the following:
   − Click **Policy Extension** to enter optional policy coverages.
   − Click **Save & Continue**, and then skip to the *Quote Location Rating Information* section.

Policy Extensions

Use the **Policy Extension** screen to enter additional optional coverage extension endorsements, such as an extension of coverage for restaurants, hotels, or motels.

Follow these steps:

1. Identify the optional coverage extension endorsements as needed.
2. Click **Save** to save your entries and return to the **Policy Rating Information** screen.
3. Click the **Location Rating Info** tab.

Location Rating Information

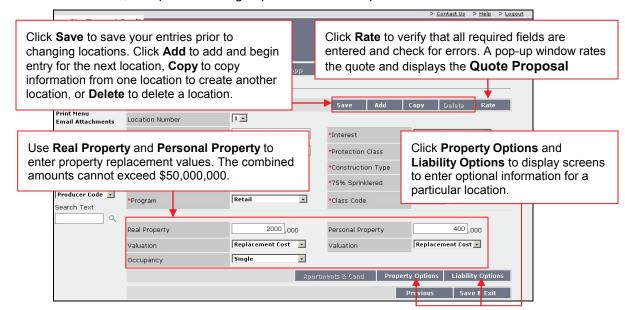The **Location Rating Information** screen works in a similar fashion to the **Policy Rating Information** screen, except the coverage options are tied to specific locations.

Click **Save** to save your entries prior to changing locations. Click **Add** to add and begin entry for the next location, **Copy** to copy information from one location to create another location, or **Delete** to delete a location.

Click **Rate** to verify that all required fields are entered and check for errors. A pop-up window rates the quote and displays the **Quote Proposal**

Use **Real Property** and **Personal Property** to enter property replacement values. The combined amounts cannot exceed $50,000,000.

Click **Property Options** and **Liability Options** to display screens to enter optional information for a particular location.

Follow these steps:

1. Select the number in the **Location Number** field to change locations.
2. Identify the coverages for each location.
3. Do one of the following:
   - Click **Save** to save your changes for this location.
   - Click **Save & Exit** to save your entries and return to the **Home** screen.
   - Click **Property Options** to save your entries and display the **Property Options** screen.
   - Click **Liability Options** to save your entries and display the **Liability Options** screen, and then skip to the *Quote Liability Options* section.

Property Options

Use the **Property Options** screen to identify additional optional property coverages, such as building value or property protection, for a specific location.

Follow these steps:

1. Identify the property coverages for each location as needed.
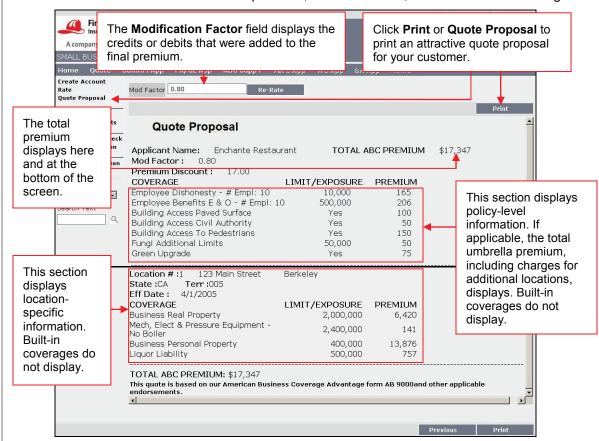2. Click **Save** to save your entries and return to the **Location Rating Information** screen.

Liability Options

Use the **Liability Options** screen to identify additional optional liability coverages, such as liquor sales, for a specific location.

Follow these steps:

1. Identify the liability coverages for each location as needed.
2. Click **Save** to save your entries and return to the **Location Rating Information** screen.

Quote Proposal

The **Quote Proposal** screen is accessed by clicking **Rate** on the **Location Rating Information** screen. Use this screen to determine the premium, check for errors, and fine tune the coverages.

The **Modification Factor** field displays the credits or debits that were added to the final premium.

Click **Print** or **Quote Proposal** to print an attractive quote proposal for your customer.

The total premium displays here and at the bottom of the screen.

This section displays policy-level information. If applicable, the total umbrella premium, including charges for additional locations, displays. Built-in coverages do not display.

This section displays location-specific information. Built-in coverages do not display.

Quote Proposal

| Applicant Name: | Enchante Restaurant | TOTAL ABC PREMIUM | $17,347 |
| Mod Factor : | 0.80 | | |

Premium Discount : 17.00

COVERAGE	LIMIT/EXPOSURE	PREMIUM
Employee Dishonesty - # Empl: 10	10,000	165
Employee Benefits E & O - # Empl: 10	500,000	206
Building Access Paved Surface	Yes	100
Building Access Civil Authority	Yes	50
Building Access To Pedestrians	Yes	150
Fungi Additional Limits	50,000	50
Green Upgrade	Yes	75

Location # :1	123 Main Street	Berkeley	
State :CA	Terr :005		
Eff Date :	4/1/2005		

COVERAGE	LIMIT/EXPOSURE	PREMIUM
Business Real Property	2,000,000	6,420
Mech, Elect & Pressure Equipment - No Boiler	2,400,000	141
Business Personal Property	400,000	13,876
Liquor Liability	500,000	757

TOTAL ABC PREMIUM: $17,347
This quote is based on our American Business Coverage Advantage form AB 9000and other applicable endorsements.

Follow these steps:

1. Review the policy-level information including the rated coverages, limits/exposures, and premiums.

2. Review the location-specific information including the rated coverages, limit/exposure, and premium for each.

3. Review the **Total ABC Premium** amount.

4. Change the modification factor, if needed. The **Modification Factor** field default is 1.0. When approved by your underwriter, enter a new modification factor between .60 (40% credit) and 1.40 (40% debit), and then click **Re-Rate** to update the final premium.

   Note Modification factors must meet risk characteristic guidelines and are subject to individual state filings.

5. Once the quote premium is determined, click **Print** or **Quote Proposal** in the left pane to print a customer version of the quote proposal.

QuickQuote On Line Training Course

Agency Access

- Enter Agency Desktop
- Open "Services" tab – top of page
- Expand (Open) "On Line tools" – left column of page
- Click on Small Business Quote Tools – near the end of the tools list
- Click on Training Module – lower right of page
    a. User can select the "Quote Creation Job Aid" to guide them in QQ
- Course opens for user to complete