

WITH AMANDA RICHARDS
MONDAY DECEMBER 28, 2020

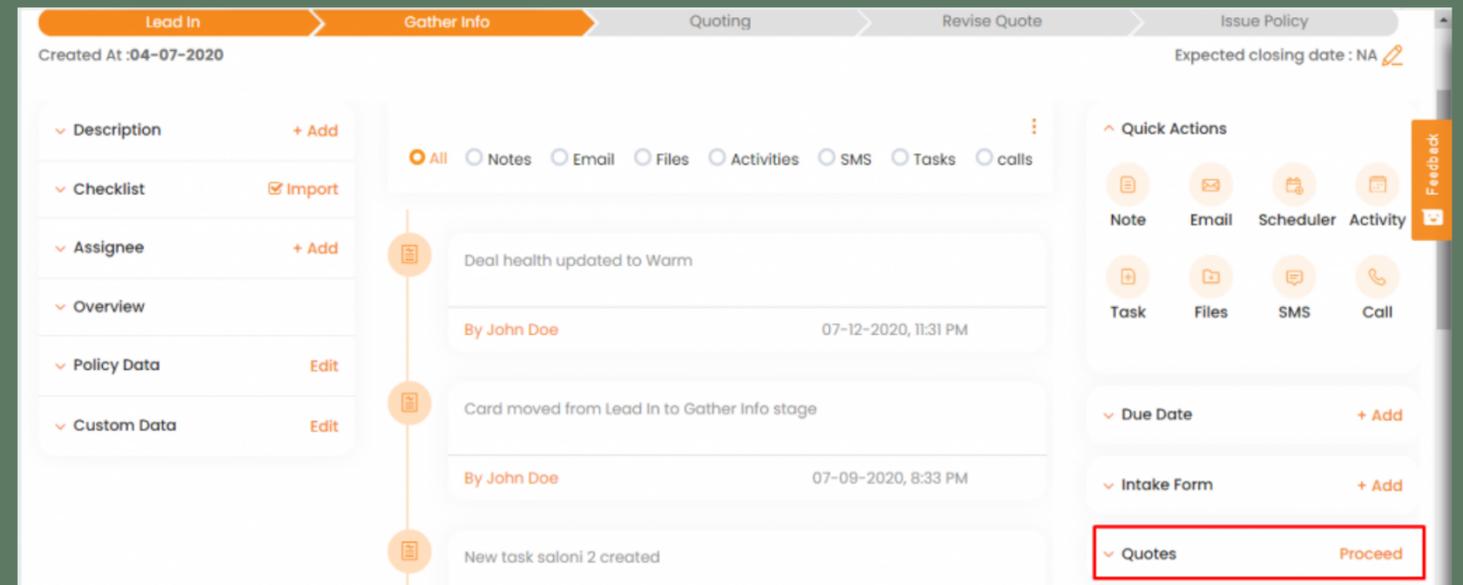
Daily Bite Size Training

Topic:
Add a Quote in a Deal Card

How to Add a Quote

1. Go to Pipeline Manager and open the deal card
2. Click Proceed in the Quotes segment on the right

Add quotes on the deal-card through the Quotes section to know which carriers you have quoted and the amount.



How to Add a Quote

3. Fill in the category name, the carrier name, and the value
4. Fill in any relevant notes

Custom Quotes

Category *
Search Category

Carrier
Search Carrier

Value
\$ 200

Notes
Notes

Custom Quotes

Category *
Search Category
Auto (Commercial)
Auto (Personal)
BOP Liability
BOP Property
Bonds Miscellaneous

Carrier
Search Carrier

Notes
Notes

Custom Quotes

Category *
Search Category

Carrier
Search Carrier
AIA
AMERICAN ECONOMY INS CO
AMERICAN RISK INS CO INC
AMGUARD INS CO
ASI (AMERICAN STRATEGIC INS)

Value
\$ 200

Custom Quotes

Category *
Search Category

Carrier
Search Carrier

Value
\$ Enter value

Notes
Notes

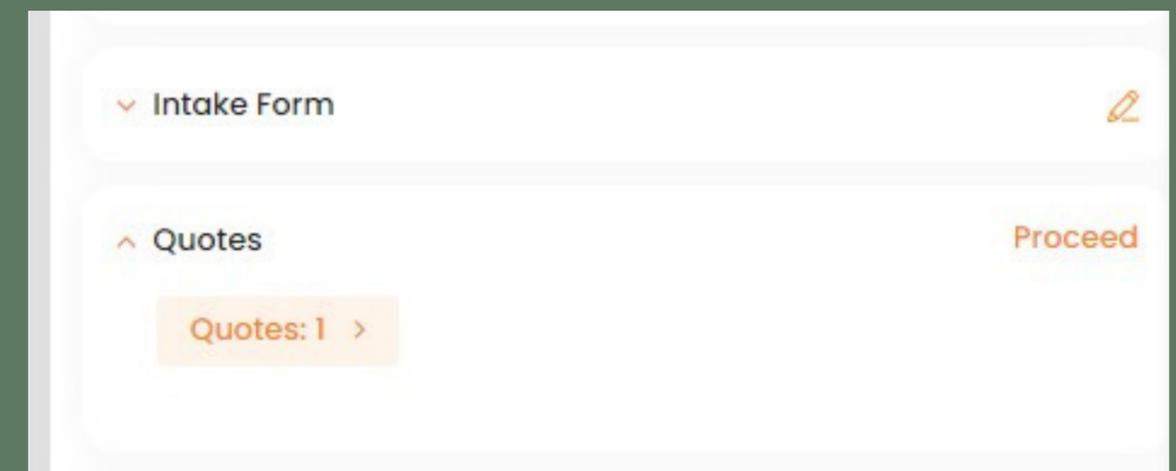
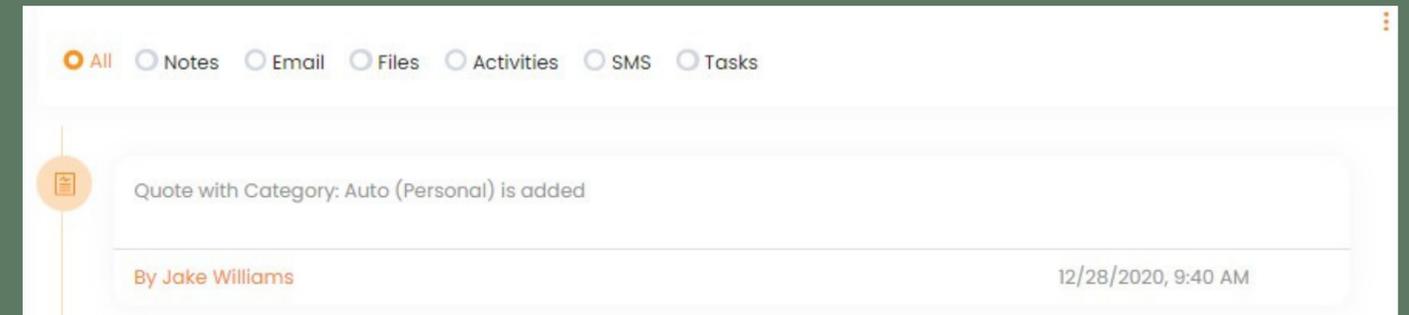
Feedback

How to Add a Quote

- You may add multiple quotes here by clicking on the Add More button
- Click Submit when you are done
- The quotes will be visible in that particular deal card

Custom Quotes

Category * Auto (Personal) x v	Carrier AMERICAN ECONOMY INS ... x v
Value \$ 500	Notes XYZ Notes
Category * Auto (Personal) x v	Carrier Allied x v
Value \$ 1000	Notes Higher Quote



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