### WITH AMANDA RICHARDS MONDAY DECEMBER 28, 2020

# Daily Bite Size Training

Topic: Add a Quote in a Deal Card

## How to Add a Quote

 Go to Pipeline Manager and open the deal card
 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.

Gathe	ar Info	Quoting		Revise Quote		Issu	ue Policy	
						Expected	closing date	e : NA 🖉
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					Note	Email	Scheduler	Activity
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	By John Doe		07-12-2020,	), 11:31 PM	Task	Files	SMS	Call
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	Now task caloni 2 area	ctod			× Quote	s		Proceed

### 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 \* Carrier Search Category Search Carrier Value Notes Notes



ustom Quotes		
tegory *	Carrier	
earch Category	Search Carrier	~
uto (Commercial)	Notes	
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OP Liability		4
OP Property		
onds Miscellaneous		
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#### Custom Quotes

egory *	Carrier
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ıe	AIA
200	AMERICAN ECONOMY INS CO
	AMERICAN RISK INS CO INC
	AMGUARD INS CO
	ASI (AMERICAN STRATEGIC INS)

Quotes				×
ategory	•	Carrier Search Carrier	-	
value		Notes	•	back
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### 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

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





Category: Auto (Personal) is added		
liams	12/28/2020, 9:40 AM	
ntake Form	Q	
Quotes	Proceed	
Quotes: 1 >		

# **THANK YOU!**

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