COM – New Submission & Quoting Commercial Workflow

Course Summary

The target audience for this session is the Commercial Lines Customer Service Representative responsible to produce a Quote for a Prospect customer and document the Insurance company quote result.

Course learning Outcomes/Competencies

After attending this session, you will understand how to*:*

1. *Create Prospect Customer*
2. *Create new Submission*
3. *Send Quote to Insurance Company*
4. *Document Quote result received from Insurance Companies*
5. *Identify as Sold or Not Sold*

Resources*:* COM User Guides

Course Outline

Entering and Managing Submissions

All COM Policies start as a Submission. This section demonstrates how to enter and complete a Submission.

- Enter a New Submission
- Print or Email the Submission.
- Update or View Submissions.

Quote Results and creating Proposal for the Customer

All Quote results are to be entered in COM. This section demonstrates how to enter the results in COM.

- Enter Quotes results from Insurers based on acceptance or reasons declined
- Create the Proposal for the Customer.

Confirmation from Customer (Sold or Not Sold)

All COM policies quotes have to be flagged as Sold or Not Sold. This section demonstrates how to identify it in COM.

- Enter Proposal Results.
- Print a Binder Document.
- Print Preview Options – Word Merge Options

Issuing and Managing Policies

- Issue the Policy
- Complete the Policy

Attach Documents