

- Here is our Login Screen

**Returning Agent**

View current applications or get a new quote

Login Account

Password

[Forgot My Password](#)

Not a returning agent? Click [here](#) to get started!

**New agents start here to create an account!**

- Below is the registration process to create an Agent account.
- **Accuracy of agent details is imperative to be able to issue business!**

## Need To Create Login To Continue.

**Creating a Login**

We need to create a login in order to:

- Secure your information
- Allow you to return and look at your application(s) and quote results in the future

(If you are a returning customer please click here to [login](#) .)

Login Account (we suggest email address)

Password (at least 6 characters)

Confirm Password

**Forgot Password**

Question to ask if you forget your password

Answer

**Contact Information**

First Name

Last Name

Preferred Method of Contact

Work Phone


- This is your unique and very simple agent “Dashboard” that you will use to transact quote data to our carriers and to communicate with us. It is managed in two tabs,
  - **Submitted Apps** – those you have completed the quote interview process, submitted the data for quotes, and are waiting for your rates to return.
  - **Unsubmitted Apps** – those where you may be waiting on some missing info before you submit it.





**IMPORTANT:**

This status is the same as a Hold or Manual Quote request, there will not be a rate returned unless the agent proactively calls or emails us to review!

These are your Statuses that are constantly being updated (even when you are not logged in!) Any new updates to your dashboard automatically trigger an email to you with a link back to that case for you to review.

Agents Name Here

Submitted Apps		Unsubmitted Apps						
1 item found.								
				Encompass	Safeco	MetLife		
App#	Client Name	Submitted	Line					
503236	Doe, John	01/23/08	PersAuto		\$1,800	\$2,154	<b>BUY</b>	<b>Modify</b>

Legend :  = In Quoting Queue |  = Waiting to try again |  = Currently Quoting |  = Underwriter Reviewing |  = No Result Available

If you did not receive a quote result, there may still be a carrier available. A representative will review your submission shortly and contact you if your business qualifies.

[Request a New Quote for Business Insurance](#)

[Request a New Quote for Personal Insurance](#)


Here is where you start a new customer quotation. And choose the line of business






- Once you have completed the entire interview process for a particular line of business and have submitted it for quotes. A rate will appear as developed by the carrier in real time. Once a rate returns, click on the rate to see the details and official proposal.

Agents Name Here

Submitted Apps    Unsubmitted Apps

1 item found.

App#	Client Name	Submitted	Line	Encompass	Safeco	MetLife		
<a href="#">503236</a>	Doe, John	01/23/08	PersAuto		\$1,800	\$2,154	<a href="#">BUY</a>	<a href="#">Modify</a>

Legend :  = In Quoting Queue |  = Waiting to try again |  = Currently Quoting |  = Underwriter Reviewing |  = No Result Available

If you did not receive a quote result, there may still be a carrier available. A representative will review your submission shortly and contact you if your business qualifies.

[Request a New Quote for Business Insurance](#)

[Request a New Quote for Personal Insurance](#)

Click on Rate

- When a carrier has returned a rate you can click on the that carrier rate displayed in your dashboard and a secondary window will appear which allows you to; email an underwriter, edit and re-submit, view a printable proposal you can provide your customer, review billing options, and notify an underwriter of your interest to bind (note this feature here is only an email!)
- TO BIND: You will want to go through the BUY process on the next page to expedite your complete application bind submission request!**

ViewCarrierResult - Microsoft Internet Explorer provided by AUJ

https://secure.insurezone.com/brand/iz/nobrand.jsp?ToPage=ViewCarrierResult&doc=Proposal&appId=503

**Next Steps** OK

Here are all the available Next Steps for this Carrier Result.

Email Underwriting → Edit Resubmit → View Proposal → View Payment Options → Submit Bind Request

Doe, John

App #	Description	Carrier	Line
503236	Customer ABC, 123	MetLife Insurance	PersAuto

**Quote**

Premium	Policy Id	Carrier Contract	
\$2,154.00	10518656	IZTexas [73]	<a href="#">MetLife Auto &amp; Home®</a>

Please review all carrier proposals carefully as coverages can vary by carrier.

**Assumptions and Coverage Changes**

Review information below and email us if necessary to resolve issues or questions.

- I certify that the request for a Consumer Report is made for a permissible purpose, underwriting insurance. I further certify that the Consumer Report will be used in connection with an application for

Internet 100%

- The Dashboard workflow is straight forward when it comes time to submitting a bind request. Simply click on BUY, choose appropriate quote and customer, click “submit bind request”, and supply specific details necessary to complete the transaction.

Agents Name Here

Submitted Apps
Unsubmitted Apps

1 item found.

App#	Client Name	Submitted	Line	Encompass	Safeco	MetLife		
503236	Doe, John	01/23/08	PersAuto	?	\$1,800	\$2,154	<b>BUY</b>	<b>Modify</b>

Legend : ■ = In Quoting Queue | ■ = Waiting to try again | ■ = Currently Quoting | ? = Underwriter Reviewing | ■ = No Result Available

Click on BUY

If you did not receive a quote result, there may still be a carrier available. A representative will review your submission shortly and contact you if your business qualifies.

[Request a New Quote for Business Insurance](#)  
[Request a New Quote for Personal Insurance](#)

- The bind submission request form captures the insured, effective dates, desired carrier you have selected, and payment information. After you have submitted, an underwriter will communicate via email about the progress and any potential supplement information requirements.

**Agent simply verifies and supplies needed information by Line of Business in order to process the Bind Submission Request.**

**BIND REQUEST FORM**  
 Coverage is in force and verified once you have received a Binder from an authorized company representative and/or agent.  
 All quotes are subject to verification and final approval by the insurance carrier.

Application ID: 503236  
 Insured Name: Doe, John  
 Named Insured as it should appear on the policy: ?

Mailing/Billing Address of the insured:  
 Street Address ?  
 Street Address (Line 2)   
 ZIP ? Lookup City/State

**Please enter the policy information that pertains to your bind request(s):**

Commercial Auto  
 Businessowners/Package Policy  
 Workers Compensation  
 Umbrella Liability  
 Personal Auto

Effective Date ?

Carrier ? Select One

Premium ?

Payment Plan ?

Please note: if the driver's license number provided on the application is not valid, there could be a delay in issuing the policy. Please verify all driver's license numbers before submitting the bind request form.

Payment Information  
 Note: Down payments must be made via online check (EFT), and are entered electronically - when the policy is issued - no need to send the check to the carrier. Please enter the information as it appears on their check you collected below:

Option ? Select One