

Quick Guide - How to Request Quote Reservation

The program offers 2 methods to request that coverage is bound, either with the **Quote Package** or **Quote Reservation Package**.

REQUESTING QUOTE RESERVATION

1. Quote Package
 - a. The first method is to print the **Quote Package**. Completed and signed documents should be submitted to plsubmissions@appund.com. With this method coverage can only be bound effective on the date that we receive all the relevant completed and signed forms. To generate the **Quote Package**, click the **Show Quote Proposal** button on the **Billing** screen. A message will pop up stating the **Quote Proposal** is being generated. Click back to the **Dashboard**. Click on the Quote number under the **Notifications** box to print the package.
2. Quote Reservation Package
 - a. The second and preferred method is to move forward with the **Quote Reservation Package**. Once you know the insured is interested, with a confirmed effective date, click the **Submit & Reserve Quote** button to submit to underwriting. **This locks the quote, billing plan and effective date**. Documentation needs to be remitted within 5 days. Payment needs to be remitted within 30 days from the effective date. If payment is not received in this time, the **Quote Reservation** will expire and no coverage was afforded.

BILLING OPTIONS

1. Agency Bill
 - a. Remit **full gross payment** with a check or completed ACH form, from the Agency or Insured within 30 days of policy effective date.
2. Mortgagee Bill
 - a. Ensure that the mortgage company has been accurately entered. You will need to click on the "Bill To" check box to generate the Mortgagee Invoice as part of the Quote Reservation Package, see screenshot below. Payment will need to be remitted within 30 days of the effective date. So with Mortgagee Billed policies it is preferable to use a future effective. However, with this billing plan we are able to over-ride the 30 day Quote Reservation expiration if payment is received within 60 days of the policy effective date.

Name	Type	Bill To	Address	Phone	Loan Number
GREEN TRUST SERVICES LLC:15A0A	Mortgagee 1	<input checked="" type="checkbox"/>	FOURX RESERVATION MIAMI FL 33157		0027400125

3. Premium Finance
 - a. Remit the 25% down payment that is printed on the Premium Finance Agreement within 30 days of the policy effective date. The finance company will fund the balance and mail a payment booklet to the insured.

WHICHEVER BILLING PLAN YOU SELECT WILL AUTOMATICALLY GENERATE THE CORRECT FORMS IN THE QUOTE RESERVATION PACKAGE.

Once you click on **Submit & Reserve Quote** the quote is now locked and in **Submitted** status. An underwriter will review the quote, once reviewed and **Approved** the underwriter will email the **Quote Reservation Package** to you. You will also see that the **Quote Reservation** has been **Approved** under the **Notifications** box on the **Dashboard**. The file is now **Binder Approved** status. Once the signed documents and payment have been received the full Policy will generate and will be emailed to you. It is your responsibility to ensure that the insured and, if applicable, the mortgage company receive a copy.