Assigned to VIPIN Agent Process:

- ☐ Go to lead in Spear- Attempt to make phone contact with borrower
  - If contact attempt fails utilize e-mail / text to make contact
- ☐ Disposition lead in Spear as “prospect” if you cannot reach
- ☐ Gather underwriting, preferred rating, and auto information
- ☐ Note EZlynx with findings
- ☐ Run quotes with all carriers, pick the best option, provide coverage information on phone & e-mail, CC the loan officer on quote e-mail. (make sure to save activity w/ quotes from outlook to Ezlynx when prompted in outlook)
- ☐ Go to lead in Spear- Update to “Quote proposed” & upload quote in Spear at the bottom
- ☐ Set task in Ezlynx to follow-up on quote in 48 hours

Client Accepts Quote:

- Go to lead in Spear, disposition “Quote Accepted”
- Go to client in Ezlynx, Documents Tab, (green “add” button) – click form. Click on “Agency” search “evidence”- Click “evidence of insurance- VIP Mortgage Invoice Included” and click (blue) “add document”.
- Fill in:
  - Insurance Company
  - Loan Number (gather from Spear)
  - Policy Number (use quote ID or policy number agent will let you know)
    - How to find policy number: always use the quote number. You can find the quote number on the quote for most companies.
    - Safeco does not have a quote number, so you must make one up for the time being.
    - Travelers won’t be on the quote, it is the CCF number (you can find this on the quote tab in EZlynx)
  - Effective date (gather from Spear)
  - Location Description
  - Remarks—Total premium- premium due- Ins Company Name- Extended replacement cost percentage
  - Coverage Information- fill in the blanks and deductible
  - Check Mortgagee at the bottom under additional interest
- E-mail EOI to lender, CC client (for peace of mind it was taken care of)
- Add accepted premium into your own personal sales log tracker

Loan Closes- Ready to Issue:

- ☐ Issue policy through carrier site
- ☐ Save the application to e-sign
- ☐ Go to Ezlynx- Documents Tab- (Green) Add Button, Click upload, search for application, select it and save. Go down to the “create e-signature button” still in documents tab, add yourself to it as signee, fill out the form, and send to your client.
- ☐ Send Post Sale E-mail to client (use template including service’s info based off alpha split)
- ☐ Go to Ezlynx: Save in Activity the: Policy Number, Carrier Name, Effective Date, Method of payment, Annual Premium, trailing docs you are waiting on (quick release pictures, appraisals, alarm certificates, current declarations on auto, etc.)
- ☐ Go to lead in Spear- Disposition as “Converted”
- ☐ While in Spear, go to “feed” tab, click on “VIPIN closed policies” Update that w/ the premium, and add into Spear.