



Client Accepts Quote:

- Go to lead in Spear, make sure agent disposition “Quote Accepted” or “quote issued/converted”
- Go to client in Ezlynx, Documents Tab, (green “add” button) – click form. Click on “Agency forms” search “evidence”- Click “evidence of insurance- VIP Mortgage Invoice Included” and click green “preview”
- Fill in:
 - Insurance Company
 - Loan Number (gather from Spear)
 - If there is a co-borrower add them in
 - 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 should match “insured” address if primary
 - If secondary/investment make sure “insured” address is primary/ mailing, and “location description” is address we are insuring.
 - Remarks—Add in:
 - total premium- premium due (**these will always match**)
 - Extended replacement cost percentage (if not already typed in on template)
 - Most of the time we use 50% or 100%
 - If Encompass use 100% extended
 - If Metlife use “guaranteed replacement cost”
 - If Electric use “unlimited replacement cost”
 - Coverage Information- fill in the blanks and deductible
 - Check Mortgagee at the bottom under additional interest
 - Click green “actions” button and **SAVE**
 - Click green “actions” button and **DOWNLOAD**
 - Save EOI w/ “client name EOI and Invoice”
 - Use the RCC saved in documents tab for EOI/Invoice/RCC email
- E-mail signature template to send EOI and RCC to lender, CC client (for peace of mind it was taken care of) Find who to send it to on google share doc tab lender list, OR spear opportunity on the related tab.