

EVERYTHING JUST GOT BETTER. QUOTE DOWNLOAD IS NOW AVAILABLE IN ICON.



SAVE TIME AND INCREASE PRODUCTIVITY WITH ANOTHER AUTOMATION FIRST

With Quote Download you can move quote information that's in ICON as well as some third-party data (e.g., construction, occupancy, protection, exposure (COPE) information) into your Agent Management System (AMS) as a New Business Quote.

Quote downloads are available for BOP quotes with a status of declined, non-bindable or ready to issue. As soon as you select Download Quote to AMS, the NBQ policy download transactions will be in your Ivans account in seconds. For Applied EPIC, take advantage of Instant Download to update EPIC in real time.

INSTRUCTIONS:

1. When the quote downloads, it will download as New Issued Business (NEW).
2. Change the status to New Business Quote (NWQ).
3. Once this change is made, under Policies, it will display correctly as New Business Quote.

The screenshot shows the Applied EPIC software interface. A quote record for a BOP - Business Owners Policy is displayed. The status is set to 'New Policy'. The quote is issued to South Carolina. The policy number is BOP - 1/18/2025. The servicing/billing method is Direct bill. The premium is payable in CA. The quote is marked as non-bindable.

The screenshot shows the Applied EPIC software interface. The quote record for the BOP policy has been updated. The status is now 'New Business Quote'. The rest of the quote details remain the same as in the previous screenshot.

The screenshot shows the Applied EPIC software interface. The quote record for the BOP policy is now listed in the Policies section. It is categorized as a 'New Business Quote' with an effective date of 1/18/2024. The quote is marked as non-bindable.

AVAILABLE WHEN...

- › You have [Policy Download](#) in place.
- › You're quoting the next generation of Spectrum®.
- › You see it on the **ICON** premium summary screen under **QUOTE OPTIONS**.

The screenshot shows the ICON Small Commercial Quoting software interface. A message indicates that the agency is no longer the Broker of Record. Below this, a thank you message for considering The Hartford is displayed. A red box highlights the 'Download Quote To AMS' button at the bottom of the page.

KEY BENEFITS OF QUOTE DOWNLOAD

- › Quote is available in your Ivans account in seconds.
- › Builds a remarket lead source in your AMS.
- › If the business quoted is not in appetite or is non-bindable at The Hartford, you can request the quote data right back.
- › Coverage recommendations provided to close gaps and minimize E&O risk.



We're continuing to expand our appetite.

If we decline the account or our quote is unsuccessful, you can download the quote information into your Applied EPIC system.

KEEP YOUR BUSINESS MOVING.
Check out Quote Download today in ICON.