

## New Quote: New Account Details

**New Quote: New Account Details**

Account Type: Personal

Primary Named Insured

First Name\* -- Required for Quote --

Last Name\* -- Required for Quote --

Date of Birth\* MM/BB/YYYY

Address

Address Line 1\* -- Required for Quote --

Address Line 2

PO Box

ZIP Code\* -- Required for Quote --

City\* -- Required for Quote --

County\* -- Required for Quote --

State\* -- Required for Quote --

Contact Information

Phone Type\* Mobile

Mobile Phone\* \_\_\_\_\_

Email Address \_\_\_\_\_

Which line(s)/product(s) are you planning to quote under this account?

Personal Auto Home Dwelling

Also the following products

Watercraft Road & Trail

Cancel Next

When starting a new quote, you will be brought to the **New Quote: New Account Details** page.

- Enter the **Primary Named Insured's** contact information.
- Select the **line of business / product**.
- Once the information has been entered, select the **Next** button.

**Note:** If a match is found, it will bring you to the **Matching Account Found** screen. If no match is found, you will be brought to the **Account Holder** screen.

## Matching Account Found

Matching Account Found

There is no existing client for your agency.

You may also want to take a look at these or click on "Create New" to start with a new account.

Account #	Account Holder	Address	Phone #
494005690	BARB KUHW	1410 4th St, Camanche, IA 52730-2037	952-821-7217

Previous Add Quote To This Account (A) Create New Account (B)

Review the account found:

- If it's a match, select **Add Quote To This Account (A)**.
- If it isn't a match, select **Create New Account (B)**.

## Account Holder

Account Holder

Account Summary

Account 494005690

Account Holder Tommy Trainer

Address 1410 4th St, Camanche, IA, 52730-2037

Agency Of Service

Agency\* 445 - CENTRAL INSURANCE - STORM LAKE, IA

Licensed Producer\* Gregory Morris

Account Contact

Cancel Next

- Verify it is the correct **Agency**.
- Select the **Licensed Producer** and **Account Contact**.
- Select **Next**, which will bring you into the quote.