

Renewal All Plans or Select Plans Quote

To generate an all-plans quote for an existing customer, select the customer from the renewal section of the dashboard.

A landing page for that group opens with the available renewal options. Groups can update some of their group information by clicking [here](#). Select all or selected renewal plans.

There are descriptions of what each quote type provides. Confirm the effective dates for the renewal and the quote, which should align with the renewal date. Click next. On the group details tab, confirm the street address for the company. If you need to change the address, you can do it on the screen if you are also submitting a plan change in partnership with the quote. If not, follow the existing process for address changes. Click next.

On the subscriber tab, you can view census information for the group. When generating this quote, you can remove subscribers by clicking remove to the right of the subscriber record. You can add subscribers by using the manually add subscribers or quick subscriber upload links. Click next.

On the review rates tab, rates for all available plans in the portfolio are listed by product type. To change the product type, use the pull-down menu under the products. All subscribers are listed.

Click the + to the left of the subscriber's name to see rates for that individual. For the selected product type, scroll to the bottom of the screen. If you are done viewing the quote, click close.

If you'd like to modify the information and create a new quote, click [this link](#) and go back through the tab. If you'd like to generate the quote and e-mail it to yourself or others, click [this link](#) on the e-mail my quote screen. You can designate your recipients by selecting or deselecting the boxes above. The person who will receive the renewal is listed under contract signer and your name should be listed under broker. If these fields are blank or incorrect, follow these steps. If you'd like to send it to others click additional recipients and enter the full e-mail address into the field. Click send. You'll receive a confirmation message saying that your quote should be delivered soon. The quote will be sent to only those recipients you designated on the previous screen. It usually takes a few minutes to arrive. Click close to return to the dashboard. The quote will be listed in the Transactional history list.

When you receive the e-mail, open the attachment to view the all plans quote.

To view the quote or do a requote, click the transaction ID for the quote. Scroll to the bottom. You can download the same quote document you received in the e-mail from [this link](#). You can create a new quote from [this link](#). Click close.