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* Process for Handling Download Marketing Quotes on Renewals

Process for Handling Download Marketing Quotes on Renewals

Some carriers will download a marketing quote approximately 30 days prior to a policy's expiration date for renewal.

There are two scenarios for handling these type of renewals when:

- Payment is received from the client, resulting in a renewal policy download.
- No payment is received from the client resulting in a cancellation download.

Renewal Policy Download

Approximately 30 days prior to the expiration of a policy, the carrier will download a quote application into the client's marketing policy which is accessed through the **MARKETING** link on the **Home** or **Client** menu.

Perform the following steps to access a quote application for a client in marketing:

. On th	ne Home menu	. click INTERFA	CE.					
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Click on Deta	ils to view the Interface	Details.				[Impo	ort Files] [Br	idge]
Details	Interface ID Carrier Sequence ID	Carrier	File Name File Type	Import Date Completed Date	Exceptions Transactions	Status	Remove	
P	816 7839	Progressive	Org9_XD22DB.AL3 (5k) Daily Download	5/9/2006 5/9/2006	0 1	Complete		
. In th	e interface tab.	click the appr	opriate file's Details	📑 icon				

Note: Marketing records may also be accessed from Home > MARKETING or Client > MARKETING.



In the interface details tab, click the appropriate client's Details
 icon to access the CLIENT PROFILE > underwriting tab.

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[Select All] [Deselect A	II]							[Import Files]
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5. The **Action** can be viewed on the **CLIENT PROFILE** > **underwriting** tab. The **Action** was added when the record downloaded.

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6. Once the client makes payment to the carrier for the policy, the carrier will send the renewed policy download. The download will not set the status of the policy to **In Force** while in the marketing stage, therefore the user will need to send the marketing quote to **History**. Click **History** on the navigation toolbar to open the **History** dialog box.



7. In the History dialog box, select the appropriate Status and Reason, enter reason the record is being sent to History in the Notes: box and click Save. The marketing record is sent to History. When the download for the renewal is received it will be added to the In Force list and the expiring policy status will be updated to renewed.

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Billing Co:	PROGRESSIVE CLASSIC I 🔽 >	> Mode:	Renew	
Policy Number:	01 SBA 62364233	Status:	No Response 🛛 👽	
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Note: After the expiration date is reached on the renewed policy, the user will need to manually send the expired policy to **History**.



Cancellation Download

If the client does not pay the carrier, the carrier sends a cancellation policy download. An exception is created in the **interface details** tab because the record is in the stage of **Marketing** rather than **Policy**.

Perform the following steps to clear the exception:

1. On the Utility	menu, click i	HOME.							
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Click on Details to view the	Interface Details.						[Import Fil	es] [Bridge]	ſ
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4. To clear the exception, the marketing policy will need to be placed **In Force**. This will allow the download to find the policy to cancel. Click **In Force** on the navigation toolbar to open the **In Force** dialog box.

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5. In the **In Force** dialog box, the **In force** option is automatically selected. Click **Save** to set the policy to **In Force**.

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In force	OBound	
	Create Binder	
Click here to creat	te binder.	
	(Save Cancel



6. Once the marketing policy is **In Force**, repeat steps 1 thru 3 of this section to go back to the **interface details** tab and accept the download for cancellation. In the **interface details** tab, select the appropriate client's check box and click **Accept** on the navigation toolbar to accept the download for cancellation.

rf	ce interface details								
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d	uld not determine po	licy to re-instate. Select a	a cancelled pol	icy to re-instate.					
	AE0514946	KATHY L JONES PAUTOP C	8400 Cancellation	8/3/2003 Processing Policy	\$0.00	8/3/2003 8/3/2004	Initial Import 8/11/2004	DONEGAL MUTUAL INSURANCE	B

7. If placing the policy to **In Force** is not desired, reject the cancellation acception. Click the appropriate client's cancellation transaction check box and click **Reject** on the navigation toolbar.

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9.	In the m	arketing tab,	click the [Show]	link to filt	er for the client.)—			1
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All	ls Assign	Client Name Policy Number	Policy Type Line of Business	Stage Status	ng Page 0 of 0 Updated By Updated Date	Estimated Premium	Policy Term	Filters: [S Billing Carrier Issuing Carrier	how]

10. Click **Clear** to empty all filter boxes. In the **Client Name:** box, enter the client's name. Click **Search** to find the client's marketing policy.

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Policy Status: All	*	Issuing Carrier:		LOB:		Updated By:				
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Details Assign	Client Name Policy Number	Policy Type Line of Busines	Stage Status	Updated By Updated Date	Estimated Premium	Policy Term	Billing	g Carrier g Carrier		
		Filter result fo	ound no record(s). Plea	se modify search criteria a	nd try again.				~	

11. In the marketing tab, click the client's Details 📑 icon.

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		2	HO13124218B	Monoline Homeowners (HOME)	Marketing Quoted	Laurel Walster 10/26/2007		\$937.00 D	01/06/2007 01/06/2008	Mercury Casualty Company 11908	
		(Renewal Quote d	ownload received.							

Note: The marketing record may also be selected by searching for the client and clicking **MARKETING** on the **Client** menu.



12. Send the marketing quote to **History**. Click **History** on the navigation toolbar to open the **History** dialog box.

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ctions:				

13. In the **History** dialog box, select the appropriate **Status** and **Reason**, enter reason the record is being sent to **History** in the **Notes:** box and click **Save** to send the policy to **History**.

