

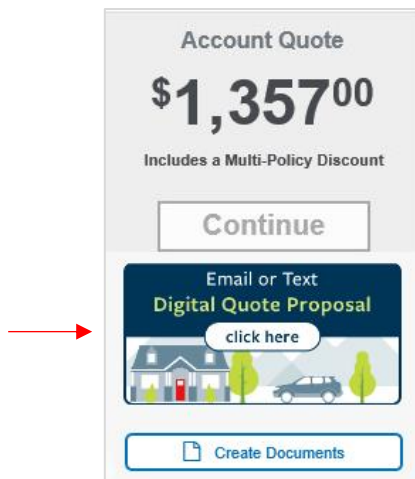
Digital Quote Proposal

Save time, educate your clients and increase response rates with our new Digital Quote Proposal! The Portfolio Page in our Quote and Issue system now includes a link to this exciting feature. Use it to send your customers monoline or rounded Quantum Auto 2.0® or Quantum Home 2.0® quotes. You can also include Travelers Click® for Umbrella and Jewelry.

Agent View

To initiate the digital proposal, click the button on the right side of the Portfolio page above 'Create Documents.' A link is also available under the Tools & Reports menu.

Important note: Always click "Rate" after making any changes to the Portfolio page. Examples: updating the bill method from Bill by Mail to EFT or adding or removing an Umbrella quote.



To send from the Travelers Quote and Issue System, choose your customer's contact preference and confirm you've entered their address or number correctly. Then select the quotes on the right side to include, and click **Send**.*

You can also send a Digital Quote Proposal yourself using the Copy Link button. You can copy and paste the Digital Quote Proposal Link into any email or materials you send to your customers.

Digital Quote Proposal

* Customer Name: TEST

* Contact Customer By: ☐ Text Message ☐ Email ☒ Both

* Customer Mobile Phone: (999)555-5555

Customer Email Address: test@test.com

Agent Name: _____

Agency: ABC AGENCY

Agency Address: 1 TOWER SQUARE

City: HARTFORD

State: Connecticut

Zip Code: 06183

Agency Phone Number: (860)277-0000

* Agent Email Address: _____

Include a personalized message for your customer: _____

Comments for Your Customer: _____

Quotes

Note - Deselecting a line of business will not update multi-policy discount(s) reflected in the quote. To make changes to quote(s) displayed here, return to the Portfolio page.

	\$575.00 2 Veh. 2 Drivers	☒ Include
	\$214.00 100 MAIN STREET	☐ Included
	\$568.00 100 MAIN ST	☒ Include

Learn More Before Sending

Interested in learning more about Digital Quote Proposal? Watch this short video to see the end to end experience and how it can benefit you and your customer!

Preview Before Sending

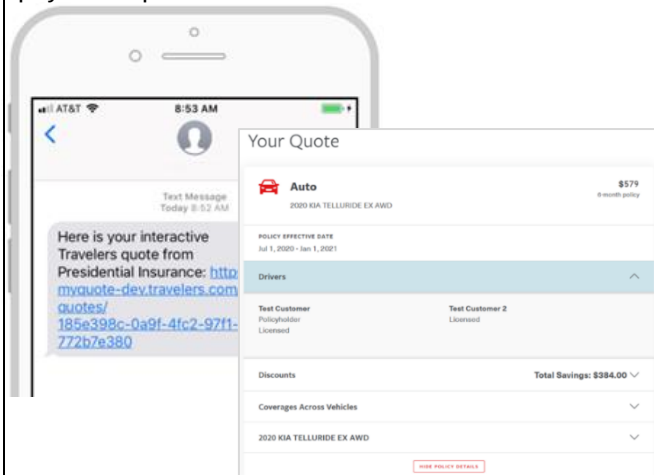
Preview your client's Digital Quote Proposal before sending.

There are 2 ways to send a Digital Quote Proposal to your customer:
1) Select "Copy Link" to send in your own materials or, 2) select "Send" to send directly from Travelers Quote & Issue system.

*[Click here](#) to learn how to resend or add another line of business to the existing digital quote proposal.

Customer View

Customers will receive the email or text with a link to the proposal. Clicking the link will display a quote with links to view policy details, coverages and limits, payment options and more.



The customer may request information on additional coverage options and send a message back to you that they are interested in pursuing the policy. Reach out to your customer to discuss billing and issuing the policy. No more missed calls!

Auto \$579
6-month policy

2020 KIA TELLURIDE EX AWD

Payment Details

Additional Options

This section allows you to learn about additional options not currently included in your quote, the approximate cost to add to your policy, and helpful information about each. Click on the title(s) to learn more. Select the checkbox next to the option(s) to indicate interest to your agent.

- ☐ [IntelliDrive® Program](#) | Save up to \$20 with enrollment
- ☐ [Roadside Assistance®](#) | + \$5
- ☐ [Premier Responsible Driver Plan®](#) | + \$18
- ☐ [Premier New Car Replacement](#) | + \$40

Thank you for your business and continued partnership. Please contact your Personal Insurance Sales Executive with any feedback or questions you may have.