

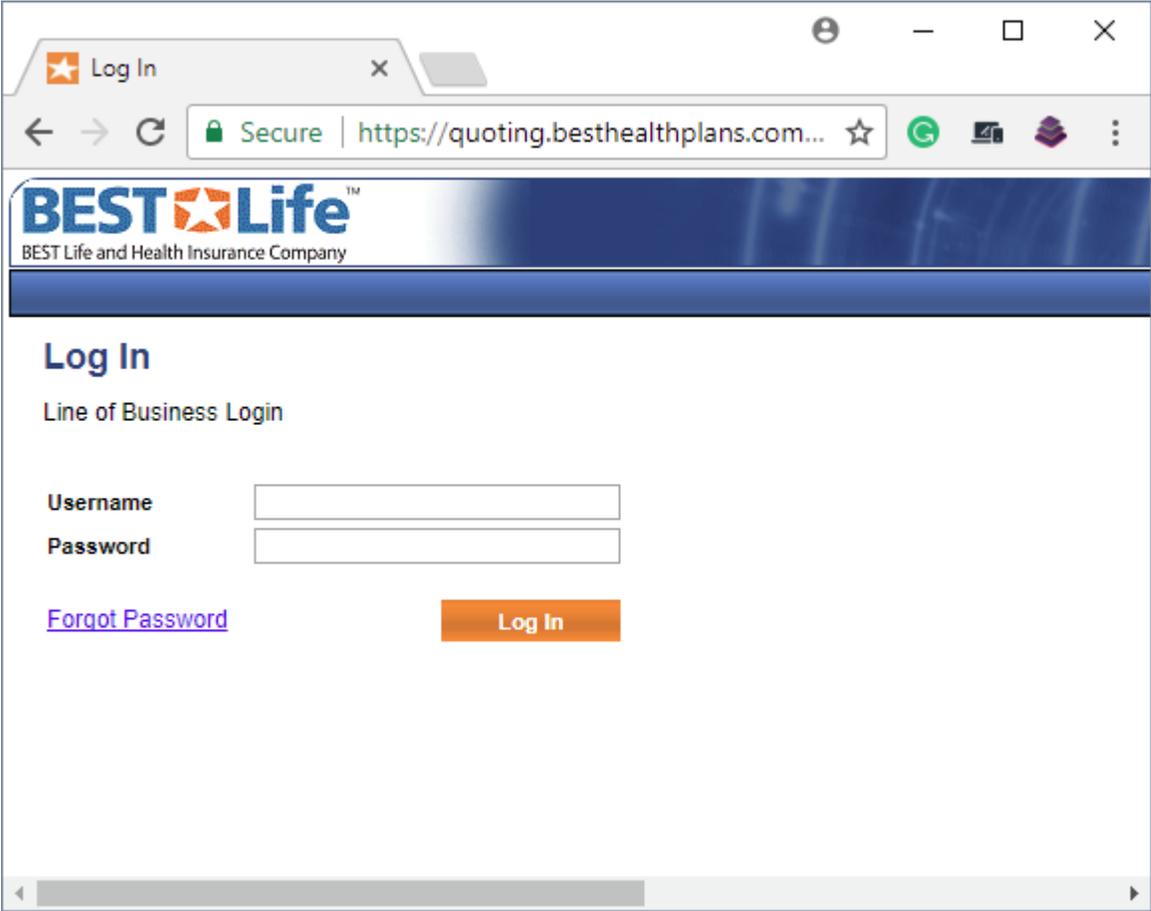


# Online Quoting Tutorial



disability · life · vision · dental

# Enter Login Information



The image shows a web browser window with a single tab titled "Log In". The address bar shows a secure connection to <https://quoting.besthealthplans.com...>. The page header features the BEST Life logo and the text "BEST Life and Health Insurance Company". The main content area is titled "Log In" and includes the sub-heading "Line of Business Login". There are two input fields: "Username" and "Password". Below the "Password" field is a blue link for "Forgot Password" and an orange "Log In" button. A horizontal scrollbar is visible at the bottom of the page content.

# Creating a New Customer Profile



[Change Password](#) | [Logout](#)  
 Logged in: Jennifer Macedo Insurance

Customer Search

Customers

New Customer Quote

Search for Existing Customer

**Customer Name**

**Customer State**

**Sales Agent**

**Customer Number**

**Customer Zip Code**

**Quote Number**

Search
Clear Criteria

Customer Number	Customer Name	Zip Code	City	State	Quoting Agent	Sales Agent	Last Quote Effective Date	Customer Quotes
<a href="#">53234698</a>	Advanced Fuel Systems	43219	Columbus	OH	Jennifer Macedo Insurance	Jennifer Macedo Insurance	10/01/2012	<a href="#">Customer Quotes</a>
<a href="#">53236198</a>	Advanced Medical Arts	89511	Reno	NV	Jennifer Macedo Insurance	Jennifer Macedo Insurance	10/01/2012	<a href="#">Customer Quotes</a>
<a href="#">53233960</a>	Benchmark Signs	76116	Fort Worth	TX	Jennifer Macedo Insurance	Jennifer Macedo Insurance	09/01/2012	<a href="#">Customer Quotes</a>
<a href="#">53233908</a>	Big Intuit	92262	Palm Springs	CA	Jennifer Macedo Insurance	Jennifer Macedo Insurance	11/01/2012	<a href="#">Customer Quotes</a>
<a href="#">53235631</a>	Brake & Clutch Supply	98117	Seattle	WA	Jennifer Macedo Insurance	Jennifer Macedo Insurance	10/01/2012	<a href="#">Customer Quotes</a>
<a href="#">53236078</a>	Cincinnati Commercial Group	45150	Milford	OH	Jennifer Macedo Insurance	Jennifer Macedo Insurance	10/01/2012	<a href="#">Customer Quotes</a>
<a href="#">53235662</a>	EMI Electrical Representatives	92618	Irvine	CA	Jennifer Macedo Insurance	Jennifer Macedo Insurance	09/01/2012	<a href="#">Customer Quotes</a>

To start a new quote for a new customer, click on the **New Customer Quote** button. To search for a previous quote, fill in the client information and click on the **Search** button. For this example, we will click on the **New Customer Quote** button.

# Assigning an Agent to the Customer

<b>Email Address</b> <input type="text" value="johnd@health.com"/>	
<b>Sales Agent</b>	
<b>Agent Name</b> *	<input type="text" value="Jennifer Macario Insurance"/> <input type="button" value="Lookup Agent"/> <input type="button" value="Clear Agent"/>
<b>Address</b>	<input type="text" value="7 Newton Street"/>
<b>City, State Zip Code</b>	<input type="text" value="Irvine, California"/> * <input type="text" value="92612"/>
<b>Phone</b>	<input type="text" value="(949) 400-9900"/>
<b>Fax</b>	<input type="text"/>
<b>Email Address</b>	<input type="text" value="johnd@health.com"/>
<b>Agency Sales Contact Information</b>	
<b>Contact Name</b>	<input type="text"/>
<b>Address</b>	<input type="text"/>
<b>City, State Zip Code</b>	<input type="text"/>
<b>Phone</b>	<input type="text"/>
<b>Fax</b>	<input type="text"/>
<b>Email Address</b>	<input type="text"/>
<b>In-House Sales Representative</b>	
<b>In-House Sales Representative</b>	<input type="text" value="John, Jenifer"/>
<input type="button" value="Next&gt;&gt;"/> <input type="button" value="Cancel"/>	

To quote for a new customer, you will need to confirm the quoting agent and sales agent. The Quoting Agent is the agent who will represent the proposal to the client. The Sales Agent is the General Agent or Agency contact working with the Quoting Agent.

The Quoting and Sales Agent will automatically default to your profile information.

# Entering Customer Details

**Customer Search** **Customer Details**

**Mandatory fields are marked with an asterisk \***

Identifier

Customer Number	<input type="text"/>
Customer Name *	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
City, State Zip Code *	<input type="text"/>
Federal Tax ID	<input type="text"/>
Number Of People On Payroll *	<input type="text"/>

Nature of Business/Industry

SIC Code *	<input type="text"/>	<input type="button" value="Lookup SIC"/>
Division	<input type="text"/>	
Description	<input type="text"/>	

Customer Contact Information

Contact Name	<input type="text"/>
Phone	<input type="text"/>
Fax	<input type="text"/>
Email Address	<input type="text"/>

Provide the customer information. You will be able to select the coverages you would like to quote once a ZIP code is provided. The city and state will automatically populate for you.

## Performing an SIC Lookup

**SIC Lookup**

Lookup SIC code using any word in the description  
 Description

Lookup SIC code using division  
 Division

**Lookup SIC**

**SIC Code**

- Agriculture, Forestry, And Fishing
- Construction
- Finance, Insurance, And Real Estate
- Manufacturing
- Mining
- Public Administration
- Retail Trade
- Services
- Transportation, Communications, Electric, Gas, And Sanitary Services
- Wholesale Trade

Search for SIC codes by clicking on **Lookup SIC**. You can provide a description or use the dropdown menu to select a division.

**SIC Lookup**

Lookup SIC code using any word in the description  
 Description

Lookup SIC code using division  
 Division

**Lookup SIC**

SIC Code	Group	Description
1521	GENERAL BUILDING CONTRACTORS	General Contractors-Single-Family Houses
1522	GENERAL BUILDING CONTRACTORS	General Contractors-Residential Buildings, Other Than Single-Family
1531	GENERAL BUILDING CONTRACTORS	Operative Builders
1541	GENERAL BUILDING CONTRACTORS	General Contractors-Industrial Buildings and Warehouses
1542	GENERAL BUILDING CONTRACTORS	General Contractors-Nonresidential Buildings, Other than Industrial Buildings and Warehouses
1611	HEAVY CONSTRUCTION, EX. BUILDING	Highway and Street Construction, Except Elevated Highways
1622	HEAVY CONSTRUCTION, EX. BUILDING	Bridge, Tunnel, and Elevated Highway Construction
1623	HEAVY CONSTRUCTION, EX. BUILDING	Water, Sewer, Pipeline, and Communications and Power Line Construction
1629	HEAVY CONSTRUCTION, EX. BUILDING	Heavy Construction, Not Elsewhere Classified
1711	SPECIAL TRADE CONTRACTORS	Plumbing, Heating and Air-Conditioning

1 2 3

**Close**

If the dropdown menu is used, you can select the SIC code for that division by clicking on the SIC code in blue.

Nature of Business/Industry	
<b>SIC Code</b>	* 8111 <input type="button" value="Lookup SIC"/>
<b>Division</b>	Services
<b>Description</b>	Legal Services
Customer Contact Information	
<b>Contact Name</b>	<input type="text"/>
<b>Phone</b>	<input type="text"/>
<b>Fax</b>	<input type="text"/>
<b>Email Address</b>	<input type="text"/>
Coverage Selection	
<b>Coverage</b>	<input type="checkbox"/> Select All <input type="checkbox"/> Dental <input type="checkbox"/> Medical <input type="checkbox"/> Vision
<input type="button" value=" &lt;&lt; Back"/> <input type="button" value=" Next &gt;&gt;"/> <input type="button" value=" Cancel"/>	

Check the boxes for the coverages you would like to quote and click **Next**.

Tip: By checking the **Select All** box, you will be able to quote other lines of coverage. Otherwise, you will need to return to the **Customers** page to edit the coverage selection.

# Completing a Census

**Census**

Use Current Census    Use Census at next Renewal Date

Census Summary    Primary Members

Identifier

Customer Name: Sample Co.    Customer Number: 53292421

Census	Count
1. Employee Only	0
2. Employee & Spouse	0
3. Employee & Child(ren)	0
4. Employee & Family	0

Primary Members    Done    Cancel

When quoting dental or vision product, please use the **Census Summary**.

# Creating a Quote

**BEST Life**  
BEST Life and Health Insurance Company

Change Password | Logout  
Logged in: [username] [email]

### Plan Selection

Mandatory fields are marked with an asterisk \*

To create a quote for sample company, please fill in the following:

What type of coverage do you wish to quote? \* Dental

Effective Date? \* <Select One>

Is this a dual choice plan? (Minimum Participation requirements will apply. Contact your In-House Sales Rep for details)

Which plan(s) do you wish to quote? \*

Available Plans

Plans to be Quoted

Select the coverage you would like to quote first, and then the effective date.

If you are quoting more than one type of coverage, you will have the option to add other coverages once you are finished selecting the plans for this coverage type.

To create a quote for Sample Co., please fill in the following:

What type of coverage do you wish to quote? \* Dental

Effective Date? \* 05/01/2012

Is this a dual choice plan? (Minimum Participation requirements will apply. Contact your In-House Sales Rep for details)

Which plan(s) do you wish to quote? \*

Available Plans

- Indemnity 100|50|0
- Indemnity 100|80|0
- Indemnity 100|80|50
- Indemnity 100|90|60
- PPO 100|50|0
- PPO 100|80|0
- PPO 100|80|50
- PPO 100|90|60

Plans to be Quoted

Next>> Cancel

Choose the plans you would like to quote from the **Available Plans** menu. You can add and remove plans to the **Plans to be Quoted** window with the arrow keys in the middle. Click **Next**.

Quote(s) will be created upon clicking the Finish button

**Mandatory fields are highlighted with red or marked with an asterisk \***

Indemnity 100|80|50

Single Choice Quote: 1 of 1

Quote Variables

What is the quoted Network? \*

Plan Choices

Indemnity 100|80|50

Benefits

Item	Schedule of Benefits
Deductible	
Calendar Year Deductible	
<input type="radio"/> \$0	\$0
<input type="radio"/> \$25	\$25
<input type="radio"/> \$50	\$50
<input type="radio"/> \$75	\$75
<input type="radio"/> \$100	\$100
Orthodontics	
Employer Contributory or Voluntary	
<input type="radio"/> Employer Contributory	Employer Contributory
<input type="radio"/> Voluntary	Voluntary
Endodontics	
<input type="radio"/> Basic	Basic
<input type="radio"/> Major	Major
Periodontics	
<input type="radio"/> Basic	Basic
<input type="radio"/> Major	Major
Usual and Customary Reimbursement	
<input type="radio"/> 80th Percentile	80th Percentile
<input type="radio"/> 90th Percentile	90th Percentile

Item	Schedule
Calendar Year Maximum	
<input type="radio"/> \$1000	\$1000
<input type="radio"/> \$1200	\$1200
<input type="radio"/> \$1500	\$1500
<input type="radio"/> \$2000	\$2000

Optional Benefits

Rate Guarantee Two (2) Years

Additional Plan Choices

Do you wish to Include Child Orthodontic Coverage ?

Yes  No

Benefits

Item	Schedule
Orthodontic Maximums	
<input type="radio"/> Lifetime Max   Calendar Max	\$1000   \$500
<input type="radio"/> Lifetime Max   Calendar Max	\$1500   \$750

Navigate To

Single Choice Quote: 1 of 1

[Indemnity 100|80|50](#)  
[Child Orthodontic Coverage](#)

Navigate To

Single Choice Quote: 1 of 1

[Indemnity 100|80|50](#)  
[Child Orthodontic Coverage](#)

Choose the benefits you would like to quote. Select between employer-sponsored rates or voluntary rates. If you are quoting more than one plan, you will be prompted to enter benefit information for the next plan once you click **Finish**.

The **Navigate To** side bar shows which plan you are currently on.

# Reviewing Customer Quotes



[Change Password](#) | [Logout](#)  
 Logged in: [Jennifer Macmillan](#)

- Customer Search
- Agents Assignment
- Customer Details
- Census
- Customer Quotes

## Customer Quotes

Identifier

**Customer Name**  **Customer Number**

Hide Inactive Quotes New Plan Selection

Print	Quote Number	Plan Name	Coverage	Pre-Screen	Quote Status	Quote Date	Effective Date	Load	Premium	Dual Choice	Linked Quotes	Copy Quote
<input type="checkbox"/>	2	<a href="#">Indemnity 1008060</a>	Dental	<input type="checkbox"/>	Initial	02/28/2013	05/01/2012	N/A	\$411.90	<input type="checkbox"/>		Copy Quote
<input type="checkbox"/>	1	<a href="#">Indemnity 1008050</a>	Dental	<input type="checkbox"/>	Initial	02/28/2013	05/01/2012	N/A	\$291.50	<input type="checkbox"/>		Copy Quote

Print
Generate Employer Agreement
Generate SBC
Done

The quotes you have generated are listed below the customer name. This window gives you the option to select a new plan, copy a quote, view plan details or print a proposal.

# Reviewing Plan Details

**Plan Details**

Indemnity 100|90|60

Navigate To: [Indemnity 100|90|60](#)

**Benefits**

*Basic*

- Palliative Care
- Space Maintainers
- Fillings
- Limited Oral Exam
- Oral Surgery

*Major*

- Denture and Bridgework
- Denture or Bridgework Repair
- Denture or Bridgework Replacement or Alteration
- Implants
- Lab Fabricated Restorations

*Preventive*

- Routine Oral Examination
- Oral Prophylaxis
- X-rays
- Sealants
- Topical Fluoride Treatment

*Select*

- Periodontics
- Endodontics

**BES**  
BEST Life and Health

**Plan Details**

- Oral Prophylaxis
- X-rays
- Sealants
- Topical Fluoride Treatment

*Select*

- Periodontics
- Endodontics

Item	Schedule of Benefits
<b>Deductible</b>	
Calendar Year Deductible	
\$50	\$50
<b>Orthodontics</b>	
Employer Contributory or Voluntary	
Employer Contributory	Employer Contributory
Endodontics	
Basic	Basic
Periodontics	
Basic	Basic
Usual and Customary Reimbursement	
90th Percentile	90th Percentile

Item	Schedule
Calendar Year Maximum	
\$2500	\$2500

Close

To view the plan details, select the **Plan Name** highlighted in blue for each quoted plan. You can scroll down to view all the plan details. Click **Close** to return to the **Customer Quotes** page.

- Customer Search
- Agents Assignment
- Customer Details
- Census
- Customer Quotes

## Customer Quotes

Identifier

**Customer Name**  **Customer Number**

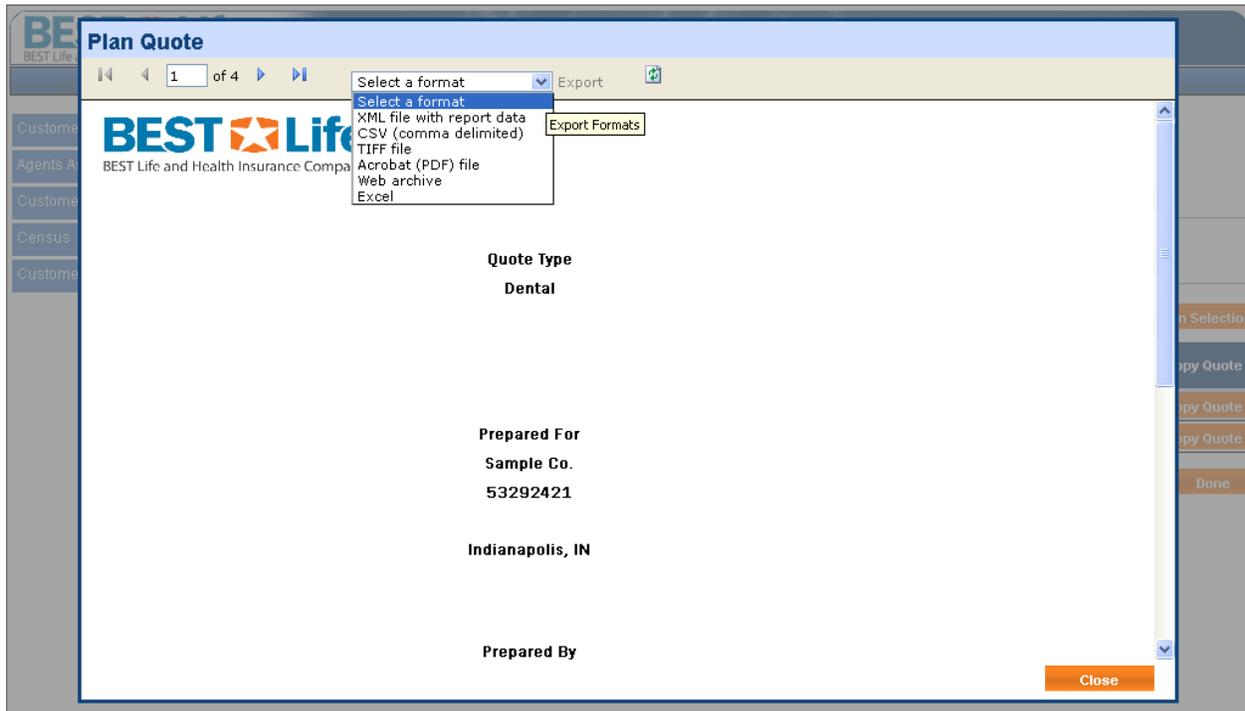
Hide Inactive Quotes

New Plan Selection

Print	Quote Number	Plan Name	Coverage	Pre-Screen	Quote Status	Quote Date	Effective Date	Load	Premium	Dual Choice	Linked Quotes	Copy Quote
<input type="checkbox"/>	2	<a href="#">indemnity 10080/60</a>	Dental	<input type="checkbox"/>	Printed	02/28/2013	05/01/2012	N/A	\$411.90	<input type="checkbox"/>		Copy Quote
<input type="checkbox"/>	1	<a href="#">indemnity 10080/50</a>	Dental	<input type="checkbox"/>	Printed	02/28/2013	05/01/2012	N/A	\$291.50	<input type="checkbox"/>		Copy Quote

To create a proposal for this client, check the print box for each plan and click **Print**.

## Creating a Proposal



To export the proposal, select a format from the **Select a Format** drop-down menu at the top, and click **Export**. A proposal in the format you selected will populate and you will have the option to open or save the file.

Tip: if you chose to open the proposal file, you can save it by going to **File** and **Save As**.



BEST Life and Health Insurance Company

Sample Co. 53292421, IN 46201

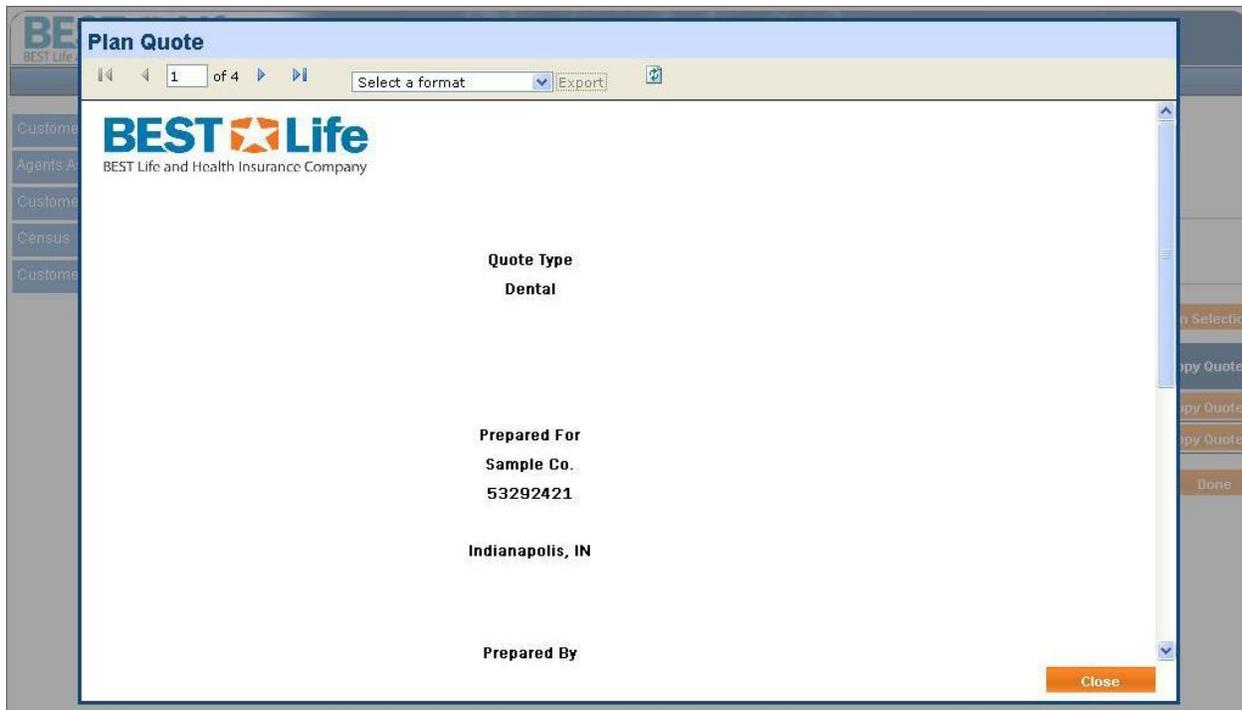
Date Quote Prepared  
03/01/2013

Industry SIC Code 1521

### Plan Comparison

Benefit Summary	Indemnity 100 80 50 Quote No 1 Effective Date 05/01/2012 Maverest Dental Alliance Overlay	Indemnity 100 90 60 Quote No 2 Effective Date 05/01/2012 Maverest Dental Alliance Overlay
	Schedule of Benefits	Schedule of Benefits
Employer Contributory or Voluntary	Employer Contributory	Employer Contributory
Endodontics	Basic	Basic
Oral Surgery	Basic	Basic
Periodontics	Basic	Basic
Usual and Customary Reimbursement	90th Percentile	90th Percentile
Preventive Care	100%	100%
Basic	80%	90%
Major	50%	60%
Calendar Year Maximum	\$1500	\$2500
Calendar Year Deductible	\$50	\$50
Special Dental Accident Benefit	\$1000 maximum per accident	\$1000 maximum per accident
<b>Premium Summary</b>		
1. Employee Only	\$29.15	\$41.19
2. Employee & Spouse	\$58.29	\$82.37

The proposal will provide you with a **Plan Comparison** and **Plan Details**. The plan details will show the total cost for each tier of the rate structure separately for each plan.



When you are done with the proposal, click **Close** and you will be returned to the **Customer Quotes** page.

# Copying a Quote



[Change Password](#) | [Logout](#)  
 Logged in: Jennifer Macaulis [username]

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- Customer Search
- Agents Assignment
- Customer Details
- Census
- Customer Quotes

## Customer Quotes

Identifier  

Customer Name

Customer Number

Hide Inactive Quotes New Plan Selection

Print	Quote Number	Plan Name	Coverage	Pre-Screen	Quote Status	Quote Date	Effective Date	Load	Premium	Dual Choice	Linked Quotes	Copy Quote
<input type="checkbox"/>	3	<a href="#">Indemnity 100 90 60</a>	Dental	<input type="checkbox"/>	Initial	03/01/2013	05/01/2012	N/A	\$411.90	<input type="checkbox"/>		<a href="#">Copy Quote</a>
<input type="checkbox"/>	2	<a href="#">Indemnity 100 90 60</a>	Dental	<input type="checkbox"/>	Printed	02/28/2013	05/01/2012	N/A	\$411.90	<input type="checkbox"/>		<a href="#">Copy Quote</a>
<input type="checkbox"/>	1	<a href="#">Indemnity 100 80 50</a>	Dental	<input type="checkbox"/>	Printed	02/28/2013	05/01/2012	N/A	\$291.50	<input type="checkbox"/>		<a href="#">Copy Quote</a>

Print
Generate Employer Agreement
Generate SBC
Done

Our online quoting tool provides the option to copy a quote for a customer. This comes in handy when you want to quote a different plan and do not want to reenter census and customer information. To perform this function, click **Copy Quote** for the plan you would like to modify.

**To create a quote for Sample Co., please fill in the following:**

What type of coverage do you wish to quote? \*

Effective Date? \*

Is this a dual choice plan? (Minimum Participation requirements will apply. Contact your In-House Sales Rep for details)

Which plan(s) do you wish to quote? \*

**Available Plans**

- Indemnity 100|50|0
- Indemnity 100|80|0
- Indemnity 100|80|50
- Indemnity 100|90|60
- PPO 100|50|0
- PPO 100|80|0
- PPO 100|80|50
- PPO 100|90|60

>

<

**Plans to be Quoted**

- Indemnity 100|90|60

Next>>

Cancel

You will be taken to the **Plan Selection** page. The type of coverage and effective date will automatically show what was previously selected. Click **Next**.

What is the quoted Network? \* Maverest Dental Alliance Overlay

Plan Choices

**Indemnity 100|90|60**

**Benefits**

Item	Schedule of Benefits
<b>Deductible</b>	
Calendar Year Deductible	
<input type="radio"/> \$0	\$0
<input type="radio"/> \$25	\$25
<input checked="" type="radio"/> \$50	\$50
<input type="radio"/> \$75	\$75
<input type="radio"/> \$100	\$100
<b>Orthodontics</b>	
Employer Contributory or Voluntary	
<input checked="" type="radio"/> Employer Contributory	Employer Contributory
<input type="radio"/> Voluntary	Voluntary
<b>Endodontics</b>	
<input checked="" type="radio"/> Basic	Basic
<input type="radio"/> Major	Major
<b>Periodontics</b>	
<input checked="" type="radio"/> Basic	Basic
<input type="radio"/> Major	Major
<b>Usual and Customary Reimbursement</b>	
<input type="radio"/> 80th Percentile	80th Percentile
<input checked="" type="radio"/> 90th Percentile	90th Percentile

Navigate To

**Single Choice Quote: 1 of 1**

[Indemnity 100|90|60](#)

[Child Orthodontic Coverage](#)

You will be taken to the **Plan Selection** page. Here you will see the benefits you had previously selected. You can make your modifications here and then click **Finish** to be taken to the **Plan Quotes** page.

# New Plan Selection



[Change Password](#) | [Logout](#)  
 Logged in: [View Profile](#) | [My Account](#)

- Customer Search
- Agents Assignment
- Customer Details
- Census
- Customer Quotes

## Customer Quotes

Identifier

**Customer Name**  **Customer Number**

Hide Inactive Quotes New Plan Selection

Print	Quote Number	Plan Name	Coverage	Pre-Screen	Quote Status	Quote Date	Effective Date	Load	Premium	Dual Choice	Linked Quotes	Copy Quote
<input type="checkbox"/>	3	<a href="#">Indemnity 100190160</a>	Dental	<input type="checkbox"/>	Initial	03/01/2013	05/01/2012	N/A	\$411.90	<input type="checkbox"/>		Copy Quote
<input type="checkbox"/>	2	<a href="#">Indemnity 100190160</a>	Dental	<input type="checkbox"/>	Printed	02/28/2013	05/01/2012	N/A	\$411.90	<input type="checkbox"/>		Copy Quote
<input type="checkbox"/>	1	<a href="#">Indemnity 100180150</a>	Dental	<input type="checkbox"/>	Printed	02/28/2013	05/01/2012	N/A	\$291.50	<input type="checkbox"/>		Copy Quote

Print
Generate Employer Agreement
Generate SBC
Done

From the **Customer Quotes** page, you can create a quote for another line of coverage by clicking **New Plan Selection**.

### Plan Selection

Mandatory fields are marked with an asterisk \*

To create a quote for Sample Co., please fill in the following:

What type of coverage do you wish to quote? \*

Effective Date? \*

Is this a dual choice plan? (Minimum Participation requirements will apply. Contact your In-House Sales Rep for details)

Which plan(s) do you wish to quote? \*

Available Plans

Plans to be Quoted

>

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This will take you back to the **Plan Selection** and follow the same process (see **Creating a Quote**). **New Plan Selection** will only provide choices for the lines of coverage you selected in **Customer Details**.

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# Editing a Customer Profile

**BEST Life** BEST Life and Health Insurance Company Change Password | Logout  
Logged in: Jennifer Macedo Insurance

**Customer Quotes**

Customer Search | Agents Assignment | Customer Details | Census | Customer Quotes

Identifier

**Customer Name**  **Customer Number**

Hide Inactive Quotes New Plan Selection

Print	Quote Number	Plan Name	Coverage	Pre-Screen	Quote Status	Quote Date	Effective Date	Load	Premium	Dual Choice	Linked Quotes	Copy Quote
<input type="checkbox"/>	3	<a href="#">Indemnity 100190160</a>	Dental	<input type="checkbox"/>	Initial	03/01/2013	05/01/2012	N/A	\$411.90	<input type="checkbox"/>		<a href="#">Copy Quote</a>
<input type="checkbox"/>	2	<a href="#">Indemnity 100190160</a>	Dental	<input type="checkbox"/>	Printed	02/28/2013	05/01/2012	N/A	\$411.90	<input type="checkbox"/>		<a href="#">Copy Quote</a>
<input type="checkbox"/>	1	<a href="#">Indemnity 100180150</a>	Dental	<input type="checkbox"/>	Printed	02/28/2013	05/01/2012	N/A	\$291.50	<input type="checkbox"/>		<a href="#">Copy Quote</a>

[Print](#) [Generate Employer Agreement](#) [Generate SBC](#) [Done](#)

To edit customer information, like the type of coverage to quote, click the **Customer Search** tab from the left menu bar.

BEST Life and Health Insurance Company Logged in: Jennifer Macedo Insurance

**Customers**

Customer Search | Agents Assignment | Customer Details | Census | Customer Quotes

[New Customer Quote](#)

Search for Existing Customer

**Customer Name**  **Customer Number**

**Customer State**  **Customer Zip Code**

**Sales Agent**  **Quote Number**

[Search](#) [Clear Criteria](#)

Customer Number	Customer Name	Zip Code	City	State	Quoting Agent	Sales Agent	Last Quote Effective Date	Customer Quotes
<a href="#">53234698</a>	Advanced Fuel Systems	43219	Columbus	OH	Jennifer Macedo Insurance	Jennifer Macedo Insurance	10/01/2012	<a href="#">Customer Quotes</a>

Click **Customer Number**. This will take you to the **Customer Details** page.

Nature of Business/Industry	
<b>SIC Code</b>	* 8111 <input type="button" value="Lookup SIC"/>
<b>Division</b>	Services
<b>Description</b>	Legal Services
Customer Contact Information	
<b>Contact Name</b>	<input type="text"/>
<b>Phone</b>	<input type="text"/>
<b>Fax</b>	<input type="text"/>
<b>Email Address</b>	<input type="text"/>
Coverage Selection	
<b>Coverage</b>	<input type="checkbox"/> Select All <input type="checkbox"/> Dental <input type="checkbox"/> Medical <input type="checkbox"/> Vision
<input type="button" value=" &lt;&lt; Back"/> <input type="button" value=" Next &gt;&gt;"/> <input type="button" value=" Cancel"/>	

Check the boxes for the lines of coverage you would like to quote for this customer and click **Done**. You will be taken to the **Customer Quotes** page. From here you can click on **New Plan Selection** and can create a quote for another line of coverage.