

Market

Sheila Delray

X

Bob Denver

X

Sheila Delra

X

Rayon Reynolds

X

Juan Valdez

X

Connor Graves

X

Create Market for Risk

☐ Send Appetite Pre-Check

Create your market worksheet by selecting reps and carriers you want to market this risk to


Q search

- Filter
- ☒ All
 - ☐ Company
 - ☐ By Carrier

Carrier

Quisque elit urna, aliquam sed, dignissim at, pellentesque sed, ante. Curabitur sit amet turpis. Fusce sem. Fusce ultricies, quam ac pharetra interdum, arcu tellus sollicitudin velit, in volutpat turpis nisi quis enim.


Add

TRAVELERS

Carrier

Quisque elit urna, aliquam sed, dignissim at, pellentesque sed, ante. Curabitur sit amet turpis. Fusce sem. Fusce ultricies, quam ac pharetra interdum, arcu tellus sollicitudin velit, in volutpat turpis nisi quis enim.


Add

 Nationwide
is on your side

Carrier

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Add

TRAVELERS

Carrier

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Add

☐ Publish in Market (viewable by all appointed carriers)


Tom Cruising

Sales Rep


Appetite Fit Check

Send

Skip



Nationwide[®]
is on your side



Initial state. Need to check appetite


Deborah Winger

Underwriter


Appetite Fit Request sent (1/22/2021)

Loved it

Not so much



TRAVELERS



Message

Appetite Check email/message sent. Waiting for response. Buttons are for manually inputting the rep response in case they replied outside of RM

Deborah Winger

Underwriter

Appetite Fit Request sent (1/22/2021)

Loved it on 1/24/2021

Tasks

☐ Quote Sent


☐ Quote Received

☐ update AMS


☐ send additional information


☐ Review with boss

Add Task



TRAVELERS





Messages

1/20/2021

Did you receive the updated forms?


New Message

Notes

1/20/2021

Need to send more information

Add Note





Employers

Login URL <https://login.employers.com/>

Industries

agriculture

autos

business

cities

wholesale

drama

electronics

landscaping

finance

games

health

home

medicine

movies

news

people



Insurance Lines

Workers Comp

Employees

Show Company Contacts Only ▼

show all

Dana Carvey

Underwriter

Description: Small Business. Medium Business. BOP



Brainstorming: Can also the standard "favorite" icon for representing company contacts

Bob Dylan

Sales Rep

Description: Small Business. Medium Business. BOP



clicking plus icon adds as Brokerage-wide contact