CREATING A QUOTE FOR AN EXISTING CONTACT WITH ACTIVE COVERAGE

01 Navigate to the Members Tab

| Quotes | Applications | **Members** | Cases | Re |
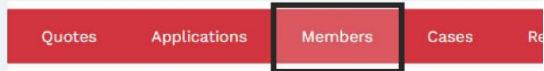
02 Member Search

Here you can search by any of the fields available.
Ideally first and last name and/or Subscriber ID.

Member Search

| First Name | Last Name | Subscriber ID | FB Membership ID | Date Of Birth |

Search   Reset

03 Select Member

Click on the Subsctiber's ID to select your member.

Member Search

04 Verify an email address is loaded

Contact Details
Email   Phone
sfust@fbhp.com   (815) 582-0930
✓ Email verified   ✓ Phone verified

Note: An email address has to be loaded to view Broker Actions.

05 Select "Create Quote" in Broker Actions

By clicking "Create Quote" you will be taken to the shopping page where you can select the plans to quote.

Create Quote

Blank APST Form
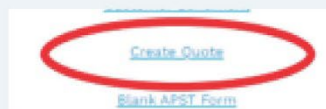
Note: This will then create the Opportunity at the Account/Contact level as well

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CREATING A QUOTE FOR AN EXISTING CONTACT WITHOUT ACTIVE COVERAGE

01 Search for Member in the Global Search

You can search by first and last name and/or date of birth.

02 Select Member and Navigate to the AccountRecord

Confirm Contact Name and Account Name match

03 Select the Related tab

04 Select 'New" on the Oppurtunities

05 Create new Opportunity

- **Opportunity Name:**
  - Last Name First Name – DOB Opp
- **Stage:**
  - Must be set as Qualification to create quote.
- **Opportunity Type:**
  - Select the plan they are applying for
- **Close Date:**
  - Set the date for 80 days from the date you are creating the opportunity.
- **Lead Source:**
  - Enter appropriate answer here
- Select Save to create opportunity

06 Navigate to new Opportunity

07 Select "Create Quote" at the top right of oppoutunity.