

Epic Quotes Commercial Lines



Instantly quote commercial policies directly within Applied Epic.

Applied Epic® is the world's #1 agency management system, and with the ability to quote commercial business directly within the platform, you can stop bouncing between systems and close renewal or new business faster.

Manual data entry, fluctuating insurer appetite, and shorter quoting windows make quoting small commercial business difficult. You need a way to deliver fast, accurate quotes to your clients while lowering overhead costs and maximizing premiums. Epic Quotes Commercial Lines (EQCL) natively brings single entry, multi-insurer rating into Applied Epic®, and ensures a single data source for the quoting and application process.

EQCL will streamline workflows and ensure consistency across the top 4 business segments in Commercial Lines – Real Estate, Contractors, Retail, and Business & Professional Services, and more than 240 business categories associated with Canada's leading Commercial insurers.

With the ability to pre-fill policy data and quote multiple lines and locations within a single workflow, you can quote new and renewal business faster, improving productivity and profitability.

Core Capabilities

- **Pre-fill Quote with Epic Policy Data:** Seamlessly push risk data from Account or Policy screens to begin quoting screen, automatically pre-filling policy and risk details from Epic, eliminating the need to re-enter base question data.
- **Multi-Operation Quoting:** Include up to three IBC codes for the same quote request, eliminating a lot of the effort and time spent quoting submissions manually.
- **Multi-Location Quoting:** Enter multiple locations, buildings, and related details as a part of a single workflow when quoting, eliminating the need to re-enter data and submit multiple quotes for a single risk with multiple locations.
- **Mark Quote as Sold:** Indicate which market was bound to the business and create a policy directly in Applied Epic.
- **Single View of Submissions:** Maintain overarching visibility into historical and active quotes.

Allows your brokerage to

- Streamline operations with an integrated quoting workflow embedded in the management system that removes data re-entry.
- Provide customers with the most competitive rates and the best coverage through more access to markets.
- Manage, service, quote, and indicate which policies are bound, without ever leaving the management system.

Have Questions?

Call 866.899.5120

Visit appliedsystems.ca

