COL Quoting/Binding Tips & Tricks

Whether you're a new Century Online user or a seasoned pro, check out these tips and tricks for quoting a risk in COL. Download the handy reference & training guide in the link below for more detailed steps & screenshots!

Accurate Effective Dates: Use the actual effective date, not the date you are entering the risk into COL. This will ensure the correct rate is applied.

Save & Create Quote Letter: Once the risk is entered and fully quoted in COL, create the quote letter. After filling in the information on the quote page; first click the "Save" button, and then the "Print/View Quote Letter". This will produce a pdf of the quote that can be saved or sent directly to the agent.

Lock the Quote: It is very important to "Lock" the quote and lock in the quoted rate, terms and coverages.

Bind Quote: Double check the premium on the left side of the screen and then click the blue button on the bottom labeled "Bind with COL – Assigned Policy Number (Recommended)".

Create Bind Letter: After clicking the bind button, the policy number will be displayed and you can click and "Create Bind Letter".

More details and step-by-step screen shots are available in the link!**Download and save for your reference or to help with training when you welcome a new member to your team!**

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COL Quoting Procedures and Tips

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