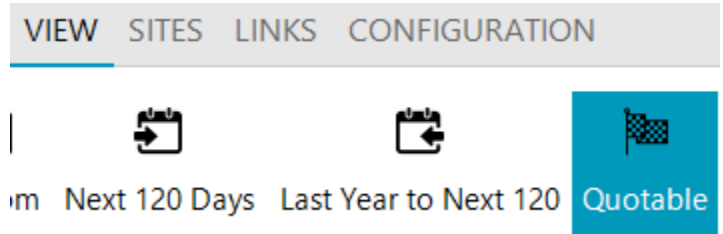




Batch Quoting Overview

Batch quoting allows you to simultaneously submit all of your quoting for the day with a single click. Every named insured will be submitted to every available market, returning results typically in under 60 seconds.

Batch quoting is initiated from the "Quotable" view. You may switch to the quotable view by choosing the "View" tab and clicking on the Quotable button.



The quotable view is essentially a dashboard of all available quoting for the day. Quotes are divided into three groups:

- **Quoting Available (90 Days Out)** - Quotes with expiration or effective dates that are 90 days from the present date. Quotes will be displayed in this group only if AeroQuote detects that there are markets for which you have not yet obtained a quote but have selected an aircraft model.

Quoting Available (90 Days Out)				
<input checked="" type="checkbox"/>	13096	Tom Carb...	10/14/2018	Bains, Willi
<input type="checkbox"/>	13091	Tom Carb...	10/14/2018	FXD Autoe
<input checked="" type="checkbox"/>	13100	Tom Carb...	10/14/2018	Thirenis, Ca

- **Quoting Available (Expires Soon)** - Quotes with expiration or effective dates that are 60 days or less from the present date. Quotes will be displayed in this group only if AeroQuote detects that there are markets for which you have not yet obtained a quote but have selected an aircraft model.
- **Ready for Renewal** – Quotes from the previous year that are ready to update for renewal (expiration dates within the next 90 or 60 days).

Also on the View tab are controls to "look forward" and "look back" a number of days. This is useful, for example, on a Monday morning when renewals might have come up over the weekend when you were out of the office. On such a day you might look back 2 days to capture quotes that became available on Saturday or Sunday.

Look Forward
 Look Backward

[Dashboard Settings](#)

Quotes within the first two groups are considered for the day's batch. In order for a quote to be included, it must meet the following criteria:

It must be "marked as ready." A quote is marked as ready by checking the box on the General tab of the quote's data entry screen.

It must be quotable by at least one market and not have already obtained a quote from that market.

If "exclude holding company" is selected for the quote (selectable via the check box on the General tab of the quote's data entry screen), It must be quotable by at least one market that is not the holding company.

Global	LAU	Menger
HOLDING	B8-0418-24	
Q30593 ...	B8-0418-15	
Q30593 ...		

For clarity, AeroQuote will display the quotability of each quote by coloring the market's cell yellow if a quote has yet to be obtained. If the market is the holding company, the word "HOLDING" will also appear within the cell.

In addition, the cell for the quote ID number will be colored in green if it has been marked as ready.

The check boxes in the batch column allow you to select or deselect quotes that will be included in the batch. AeroQuote will automatically check the box for a quote if it meets the criteria.

QUOTES VIEW SITES LINKS CONFIGURATION









New Edit Copy Delete Refresh Online Batch

Initiating the batch is as simple as clicking on the Batch button from the Quotes tab. The batch screen will list all named insureds on the left, and a familiar listing of markets on the right.

Batch	ID	Pro
<input checked="" type="checkbox"/>	13092	Tom
<input checked="" type="checkbox"/>	13096	Tom
<input type="checkbox"/>	13091	Tom
<input checked="" type="checkbox"/>	13100	Tom

Submitting every quote is as simple as clicking on the "Submit All Insureds" button. This will send all quotes to each market for each named insured simultaneously.







A check box for each market indicates if a quote will be submitted to that market, and you can uncheck a box if you do not wish to submit a quote to that market.

The check box will be disabled if quoting is not available for that market, or if the market is the holding company and the quote is set to exclude that market.

The results are displayed in the same, familiar format in which you are accustomed. You do not need to wait for all quoting to finish before viewing the results.

Submit Batch

SUBMIT ALL
EDIT

Bains, William	<input checked="" type="checkbox"/>		Status: Ready Quote:
DuBois, Francis	<input checked="" type="checkbox"/>		Status: Quote: Premium:
Farbman, Carl	<input checked="" type="checkbox"/>		Status: Ready Quote:
Mill Pond Air, Inc.	<input checked="" type="checkbox"/>		Status: Ready Quote:
Thirenis, Cathi	<input checked="" type="checkbox"/>		Status: Ready Quote:
	<input checked="" type="checkbox"/>		Status: Ready

The submit buttons are present only if you want to edit the quote for a named insured and resubmit manually.