Epic Quotes Commercial Lines

Delivering a seamless, fully integrated connected commercial lines experience 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.

Maintaining profitability while handling high-volume commercial policies can be a challenging task for brokers. Additionally, enhancing the efficiency of an expanding commercial book, evaluating new business and repositioning existing policies can take up a significant amount of time. Leveraging Applied's Connected Commercial Lines within Epic, brokers can benefit from a more integrated and comprehensive experience.

Through Epic Forms, Epic Quotes, CSR24, Indio, Data Lake, and APIs, brokers can efficiently manage all their commercial lines policies within Epic, enhancing visibility and operational efficiency. This move to a more connected experience empowers brokers to access real-time data and automation tools, ultimately leading to improved client service and streamlined processes. By embracing this solution, brokers can position themselves as forward-thinking industry leaders, offering a more seamless and advanced insurance experience for their clients.

EQCL will streamline workflows and ensure consistency across all commercial package industry segments: Contractors, Retail, Business & Professional Services, Real Estate, Farming Services, Hospitality, Warehousing Servicing, Health Services, Wholesale Services, Manufacturing/Processing Services, Member Organization Services and Education Services associated with Canada's leading commercial insurers for both real-time and email submissions.

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.
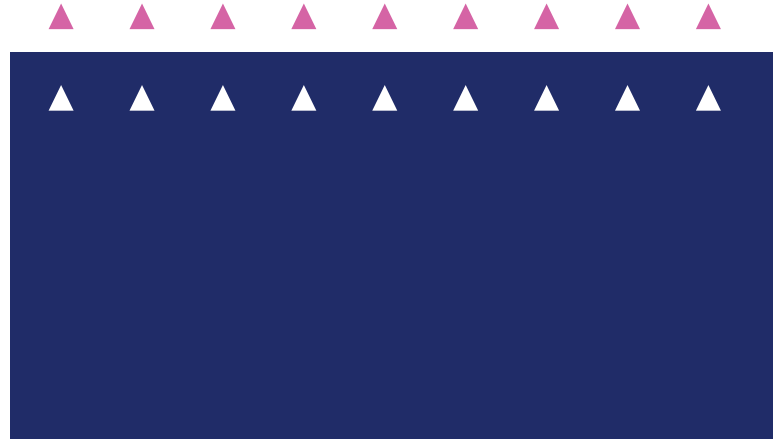
Allows your brokerage to

- Streamline operations with an integrated submission 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 polices are bound, without ever leaving the management system.

Core Capabilities

- **Pre-fill Submission with Epic Policy Data:** Seamlessly transfer risk data from Account or Policy screens to the submission screen, automatically populating policy and risk details from Applied Epic. All data is retained in Epic to support enterprise-level BI and AI analytics.

- **Multi-Operation Quoting:** Include up to three Business Operations for the same submission request, streamlining the process and reducing the time and effort spent manually quoting submissions.

- **Multi-Location Quoting:** Enter multiple locations, buildings, and related details as a part of a single workflow when quoting..

- **Mark as Sold:** Bind the market and create policies directly in Applied Epic, enabling seamless transitions from submissions to policy management and downstream services like branded proposals, certificates, and enterprise reporting via Data Lake.

- **Single View of Submissions:** Maintain overarching visibility into historical and active submissions.

Have Questions?

Call 866.899.5120
Visit appliedsystems.ca

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