

# Amwins InstantQuote Agent FAQ

External Use

Amwins IQ was designed to expedite the quoting process for small, light-touch accounts. Creating efficiency for these accounts frees up your time to focus on difficult risk placements. Answers to commonly asked questions on how to operate Amwins IQ can be found below.

## How do I access Amwins IQ?

- Navigate to <https://digital.amwins.com>
- **First time user:** If your entity uses Microsoft or Google, we recommend using our single sign on feature otherwise you can (insert what's in there now) click 'Create an account'. [Click here for detailed instructions](#). If you have additional questions, email [digital.customerservice@amwins.com](mailto:digital.customerservice@amwins.com).
- **Returning user:** If your entity uses Microsoft outlook, consider using the Microsoft single sign on feature. However, if you receive an authentication error due to your network protection, simply enter your email address and password.
- If you have inquiries about the platform, please reach out to your Amwins broker or email [digital.customerservice@amwins.com](mailto:digital.customerservice@amwins.com).

## How do I create a new submission?

Once logged in, click **+ New Submission** in the top right of your Dashboard. You can select a single line of coverage or check all that you'd like to quote to combine applications and generate multiple quote comparisons.

What coverages do you need?

Cyber Liability	Tech E&O with Cyber	Misc E&O	Private D&O Management Liability	Non-Profit D&O Management Liability	Employment Practices Liability Management Liability
-----------------	---------------------	----------	-------------------------------------	--	---

[Looking for Personal Lines coverage?](#)

## How can I provide my client with a quick quote?

Once the first page is completed, you will find a **Pre-fill for Indication** option that will help expedite the quoting process. Please be advised these answers should be reviewed/confirmed and adjusted per insured. You also have the ability to [share a link](#) to an application directly with your client for them to fill out.

Prefill for Indication

## How do I filter & sort market comparison results?

When your quotes load on the comparison page, filters will default to the lowest limit and lowest retention. However, you can manually filter quotes by selecting from a range of **Market**, **Limit**, **Retention** and **Status options**. Click **Show All** for maximum results.

AMWINS™

+ New Submission

X copy

Show All Default Filter

Markets 8

Limit - Lowest

Ret / Ded - Lowest

Status 5

1 Total Payable

Tip: Click here to access additional features such as Upload an External Quote for easy comparison.

Carrier	Limit	Retention / Deductible	Insurance Type	Actions
cfc	\$4,375.00	\$1M	Admitted	<input type="checkbox"/> Add to Proposal
ZURICH	\$4,726.03	\$2.5K	Non-Admitted	<input type="checkbox"/> Add to Proposal
		\$0	Non-Admitted	<input type="checkbox"/> Add to Proposal

< Edit & Requote

Build Proposal >

## What if a quote says 'Referral' or 'Not Offered'?

- A submission is referred because the insurer cannot provide a price at this time and your submission is being reviewed by an underwriter, please contact your broker for more information.

**Referral:** The insurer cannot provide a price at this time and your submission is being reviewed by an underwriter or will require you to trigger the referral submission by clicking the “Submit Referral” button.

- A carrier will not offer a quote when the submission is currently outside of the carrier’s appetite, either try a different limit/retention combination or contact your broker for more information.

**Not Offered:** Unfortunately, this submission is currently outside the carrier’s appetite. Either try a different combination of limit and retention/deductible, or contact your broker for more information.

at bay

Not Offered

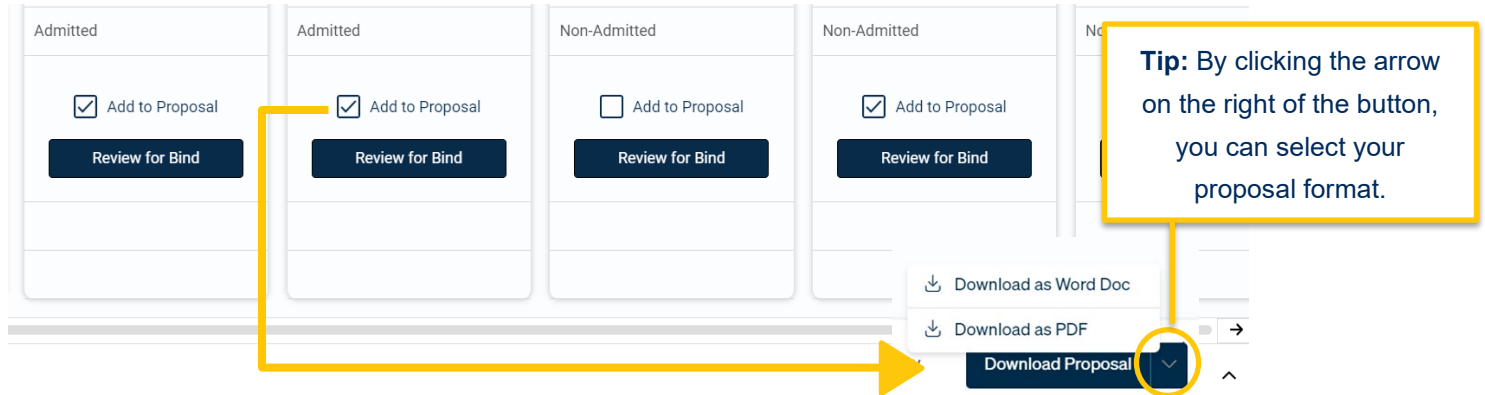
Limit/Retention combo not offered.

\$0

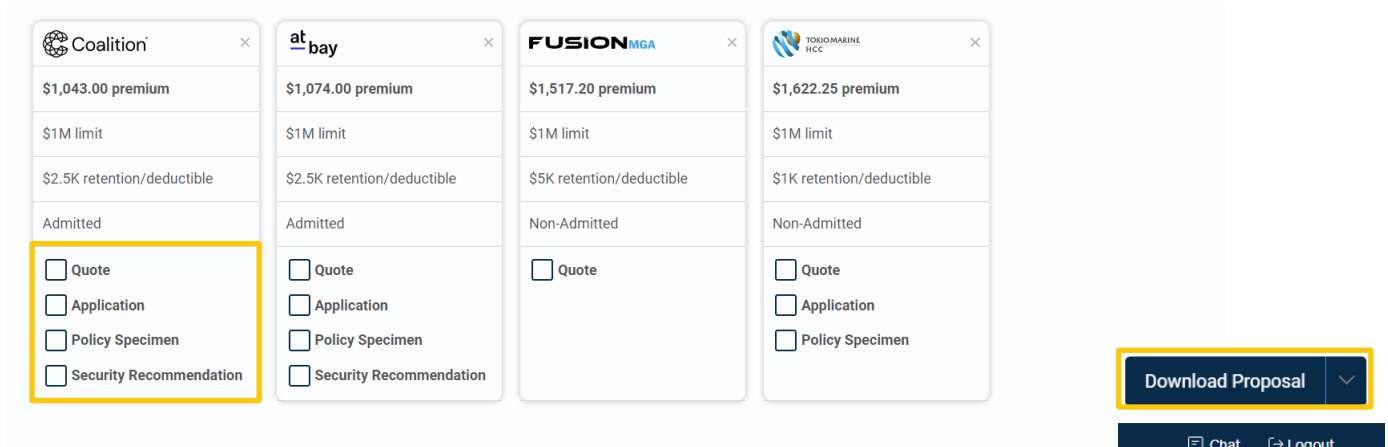
Non-Admitted

## How can I generate a quote proposal?

To create a shareable quote proposal for presenting to your customers, check **Add to Proposal** on the market quote you'd like included, then select **Build Proposal** to compile your chosen quotes.

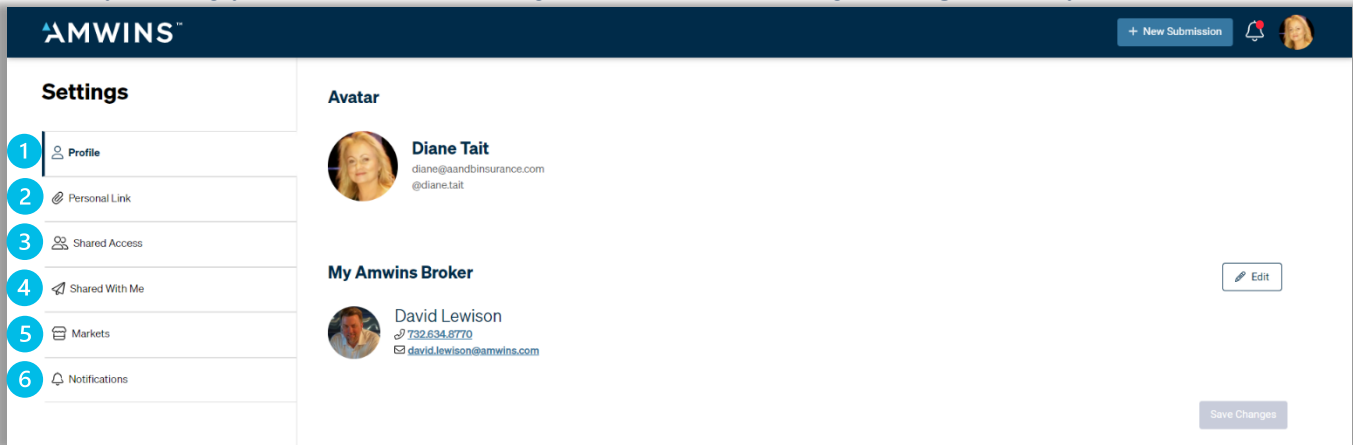


On the proposal builder page, you can select pre-filled carrier-specific documents to download in addition to your proposal.



## What can I do in my Settings?

Start by clicking your avatar in the top right corner and choosing **Settings**. Here, you can:



- 1 Profile:** Find your broker's contact information.
- 2 Personal Link:** Use this link to direct your retail network to Amwins IQ and automatically assign them to you. You must create a URL Alias to generate the Link. You will need to set up your Signature Alias (aka username, handle, display name, etc). Once that is saved, you can copy the product link and send it out to your insureds. Once the insured completes and submits their digital application (using the link shared with them), you will find it at the top of your dashboard submissions. [Click here for full instructions.](#)
- 3 Shared Access:** Share full access to your submission dashboard with a teammate by entering their email. This is ideal for teams who work together on accounts or need support while out of the office. Add and remove access at any point.
- 4 Shared With Me:** View who is sharing their dashboard with you.
- 5 Markets:** Control which markets you'd like to receive quotes from.
- 6 Notifications:** Adjust alerts you receive via email.

### More Questions?

We're here to support you! While your Amwins Broker is the best point of contact for specific questions, our Customer Support Team is also available to assist with inquiries.

Reach out to them via the chat feature or by emailing [Digitalleads@amwins.com](mailto:Digitalleads@amwins.com).