

# Quoting & Binding

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## Setting up a Rater

### Setting up a Rater

When Elephant shows on your panel of rates, you will bridge over to our quote journey to answer a few additional questions and can bind the policy. When you transfer over your agent ID will credential behind the scenes in the transfer process. No need to create or remember any passwords for this.

If Elephant does not return a rate, this is due to them not qualifying for a quote at this time. This can be based on a number of reasons including zip code.

#### **EZ Lynx**

#### **ITC/Turbo Rater**

## Quoting

### Quoting

**\*\*Quotes with Elephant are only guaranteed until close of business the same day. We do not honor prior quote prices.\*\***

#### **Quote Number**

The quote number is located at the bottom of the page on the left side. See below. Having the quote number is the easiest way to retrieve the quote.

The screenshot shows a web interface for 'Elephant!'. On the left is a vertical sidebar with icons for home, car, person, and a quote icon. The main content area is titled 'Welcome to Elephant!' and asks the user to confirm the Named Insured's information. The form includes fields for First Name, Last Name, and a dropdown for Suffix. Below these is a Date of Birth field. A section for Gender asks the user to choose the option that matches their driver's license, with buttons for Male, Female, and Nonbinary. Another section asks 'Where do you call home?' with a Street Address field (including a search icon) and an Apt. / Unit field. A 'Do you:' section has buttons for Own Home, Rent, Own Condo, Own Mobile Home, and Live with Parents/Other. In the bottom left corner of the sidebar, there is a yellow box with the text: 'Quote Number: 89FCPR900'.

## Scribe Demo

### Email or Download PDF Quote

## Email or Download PDF Quote

You can either **download** a PDF quote OR **email** an updated quote directly from the quote journey!

#### The new quote will include:

- Agent information - name, phone number, email and address
- Quote number
- All payment options including monthly
- Breakdown of coverage

## Example Email

# Ready to take the next step?

**Customer** Thank you for your time today.

Review your quote details below and give us a call back when you're ready to join the Herd.

## Agent Info

100 Box 10100 Santa Fe, NM 87114-0100

**\$235.51** monthly



Start your 6 month policy today for \$574.45.

OR

**\$856.00**

every 3 months.

**\$1,399.00**

for 6 months.

## Your quote details:

### Policy Coverage

|   | Amount of Coverage |
|---|--------------------|
| Bodily Injury Liability:<br>per person/ per accident                            | \$50,000/\$100,000 |
| Property Damage Liability:  | \$25,000           |
| Uninsured/Underinsured Motorist<br>- Bodily Injury:<br>per person/ per accident | \$50,000/\$100,000 |
| Uninsured/Underinsured Motorist<br>- Property Damage:                           | \$25,000           |
| Medical Payments / PIP:   | No Coverage        |
| Legal Assistance:   | No Coverage        |

### 2015 Jeep Cherokee Latitude Coverage

|                       | Amount of Coverage |
|-----------------------|--------------------|
| Other Than Collision: | No Coverage        |
| Collision:            | No Coverage        |
| Roadside:             | No Coverage        |
| Rental:               | No Coverage        |

Quote Number: QT2QHMYEH

Tantor, we've got a great quote for you!

1 Driver 1 Vehicle

Tantor, My Insurance, Inc. 2021 HONDA  
Policyholder PL01 BLACK 6 cyl SPORT UTILITY VEHICLE AWD

Policy Start Date: Aug 24, 2023

**\$329** monthly  
Start your 6 month policy today for \$648

OR

**\$968**  
Every 3 Months  
SAVE \$30

**\$1,735**  
For 6 months  
SAVE \$230

**Coverages**

**Liability**

|                 |                      |  |
|-----------------|----------------------|--|
| Bodily Injury   | 6 Month Cost - \$150 | \$50k per person<br>\$50k per accident |
| Property Damage | 6 Month Cost - \$225 | \$20k per person                       |

**Uninsured/Underinsured Motorist**

|                 |                     |  |
|-----------------|---------------------|--|
| Bodily Injury   | 6 Month Cost - \$25 | \$50k per person<br>\$50k per accident |
| Property Damage | 6 Month Cost - \$25 | \$20k per person                       |

Increased Uninsured/Underinsured Motorist Coverage Basic

A signed form is required by your state for Basic coverage.

Medical Payments No Coverage

Income Loss No Coverage

Other Than Collision (Comprehensive) 6 Month Cost - \$220 \$500 Deductible

Collision 6 Month Cost - \$924 \$500 Deductible

Rental Reimbursement No Coverage

Smart Roadside Assistance

https://myquote.elephant.com/quote

1/7


2023-08-04 10:41 AM Your Quote - Elephant Insurance


**Add-ons**

Legal Assistance

Disabling Deductible

Upgraded Accident Forgiveness



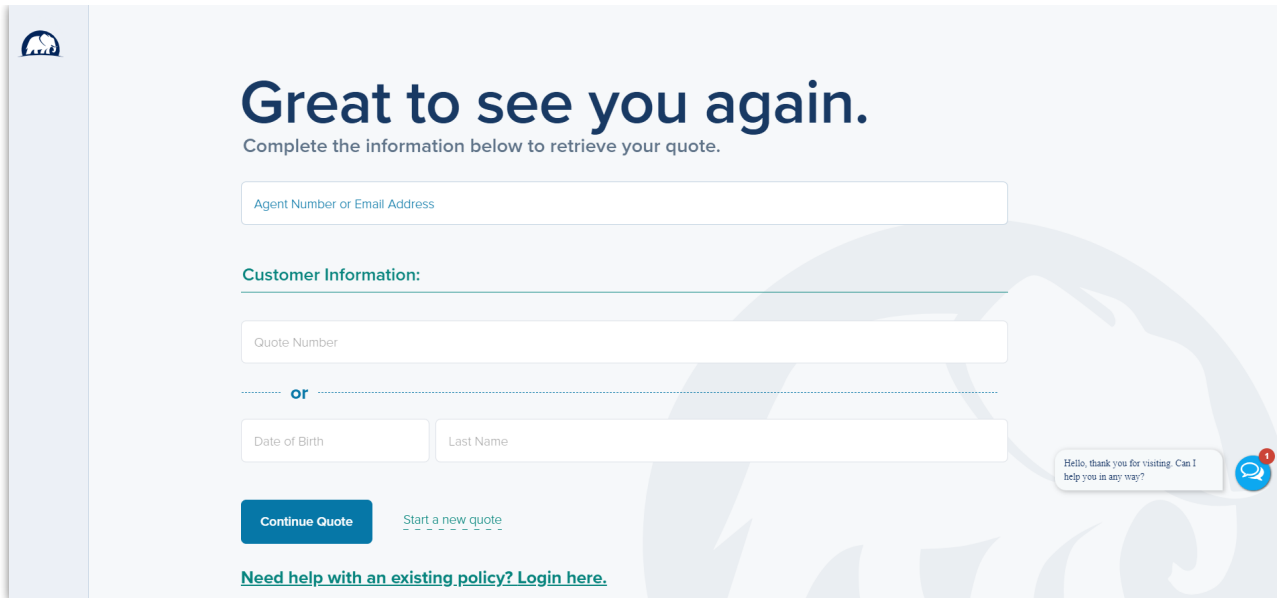
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## Retrieve A Quote

## Retrieve a Quote

If you need to come back and retrieve a quote at a later time, go to our [retrieve quote page](#) and enter your Agent ID (N# for Liberty Mutual agents and email for all other agencies) and the quote number. If you do not have the quote number you can use the customer's last name and DOB.

\*Reminder: Quotes expire after 60 days and are no longer accessible. You will be required to start a new quote. \*



The image shows a web form for retrieving an insurance quote. At the top left is a small elephant logo. The main heading is "Great to see you again." followed by the instruction "Complete the information below to retrieve your quote." The form includes a text input field for "Agent Number or Email Address". Below this is a section titled "Customer Information:" with a text input field for "Quote Number". A dotted line with the word "or" separates this from two more input fields: "Date of Birth" and "Last Name". At the bottom left are two buttons: "Continue Quote" (in blue) and "Start a new quote" (in green). At the bottom center is a link: "Need help with an existing policy? [Login here.](#)". On the right side, there is a chat bubble icon with a red notification dot and a small text box that says "Hello, thank you for visiting. Can I help you in any way?". The background features a faint, large elephant silhouette.

Great to see you again.

Complete the information below to retrieve your quote.

Agent Number or Email Address

Customer Information:

Quote Number

or

Date of Birth Last Name

Continue Quote Start a new quote

Need help with an existing policy? [Login here.](#)

Hello, thank you for visiting. Can I help you in any way?

## Binding

### Binding

- Skip to step 15 to see the Binding Process (scroll down in the scribe).
- Click "Ready to Buy" when the customer is ready to proceed.
- Add the driver's license number if it was not already entered.
- Verify some details about the vehicles, like if there are any hands-free features or the lienholder information.
- Incidents will show on the next page. Assign any missing drivers.
- Click whichever policy plan interests the customer. You can choose from Monthly, 2-Pay, or Pay in Full. If a payment plan does not show here, the customer may not qualify.
- Click the check mark towards the bottom of the box with the pay plans to save an extra \$5 per payment by using a bank account on future installments.
- Enter the customers payment details. They can have a different payment method for future payments. The first payment must be made with a credit or debit card.
- At the bottom of the page after entering the payment details, you will choose to receive the policy documents and certify the information on the quote was true.