THE MAIN REASON YOU CAN NOT FIND THE BIND REQUEST BUTTON IS THAT YOU ARE SEARCHING FOR THE CLIENTS NAME AT THE TOP IN THIS BOX Search Name: [_____]. IF YOU SEARCH THAT WAY YOU WILL NEVER SEE THE BIND REQUEST BUTTON. ****

When you submit a bind request it does not instantly take payment and bind coverage. It emails our encrypted email box all the info you entered on the bind request form and our assistants go in and issue the policies.

HOW TO SUBMIT A BIND REQUEST IN DIRECT SELECT

1. **Click the bindable tab on the main page in the direct select rater.**

	Summary	Needs Info	Bindable	Bound	
	Customer ID	**Customer Name**	**Address**	**Phone Number**	**Entered**
⌄	1	ASHKENAZI, MEIR	625 N ALTA VIST BLVD Oak Ridge TN, 37830	(323) 580-9954	8/27/2012 9:25:29 AM
⌄	31	Test, Nakoma	415 N Crescent Heights Blvd West Hollywood CA, 90048	(111) 111-1111	9/21/2012 7:18:20 AM
⌄	32	TEST, SANDY	415 N Crescent Heights Blvd Los Angeles CA, 90048	(111) 111-1111	6/10/2013 10:41:09 AM
⌄	33	M, Dude	415 N Crescent Heights Blvd Los Angeles CA, 90048	(111) 111-1111	9/21/2012 12:43:27 PM
⌄	37	Tiner, Becky	414 Bluegrass Ln Euless TX, 76039	(__) ___-____	9/24/2012 6:39:58 AM
⌄	38	Russell, Michael	608 Tree Crossings Pkwy Hoover AL, 35244	(111) 111-1111	9/24/2012 6:47:03 AM
⌄	39	BLAZER, COURTNEY	4625 Jones Loop Rd Little Rock AR, 72223	(111) 111-1111	2/22/2013 7:18:06 AM
⌄	40	JARED, FELNER	7812 HAGUE Plano TX, 75025	(111) 111-1111	10/31/2012 11:54:30 AM
⌄	41	Sear, Phillip	19525 Highway 98 Boonville MO, 65233	(111) 111-1111	9/25/2012 3:13:47 PM
⌄	43	Newtest, Tagge	800 Oak Ridge Tpke Oak Ridge TN, 37830	(111) 111-1111	1/8/2016 1:02:01 PM

Go to page: 1 of 22

2. **Click the little black down arrow next to the client's name. If your customer's name is not on the first page under the Bindable tab you can search more pages at the bottom by clicking the blue arrows to the right** ⏮ ◀ ▶ ⏭ .

	Customer ID	Customer Name	Address	Phone Number	Entered
⌄	41	Sear, Phillip	19525 Highway 98 Boonville MO, 65233	(111) 111-1111	9/25/2012 3:13:47 PM
⌄	61	Tester, John	800 Oak Ridge Tpke Oak Ridge TN, 37830	(111) 111-1111	10/10/2012 12:01:45 PM
⌄	128	DAYNE, RONALD	123 MAIN ST. Madison WI, 53703	(111) 111-1111	2/11/2013 9:52:33 AM
⌄	136	MO, MO	2008 Legend Ct Jefferson City MO, 65101	(111) 111-1111	2/14/2013 10:18:35 AM
⌄	164	Test, Connecticut	69 Wetmore Ave Winsted CT, 06098	(111) 111-1111	6/12/2013 10:22:20 AM
⌄	193	Test, Wisconsin	2045 Kensington St Janesville WI, 53546	(111) 111-1111	6/25/2013 9:20:09 AM
⌄	229	Test, Brett	800 Oak Ridge Tpke Oak Ridge TN, 37830	(345) 345-3453	5/7/2015 7:45:24 AM
⌄	247	HILL, DEREK	623 GRASSLANDS VILLAGE CIR Lakeland FL, 33803	(888) 888-8888	6/30/2015 1:06:36 PM
⌄	696	Testt, Test	800 Oak Ridge Tpke Oak Ridge TN, 37830	(865) 222-2222	12/17/2015 1:34:16 PM
⌄	950	htstbd, test	1465 Overton Ln Knoxville TN, 37923	(234) 234-2343	9/22/2016 9:08:18 AM

Tabs: Summary | Needs Info | Bindable | Bound

3. Click the request bind button

	Customer ID	Customer Name	Address	Phone Number	Entered
	41	Sear, Phillip	19525 Highway 98 Boonville MO, 65233	(111) 111-1111	9/25/2012 3:13:47 PM

Quote Type	Date Saved	Premium	Quote ID	Quote Status	
Auto	1/29/2016 2:18:05 PM	$950.00	37559866	Bindable	Request Bind

	Customer ID	Customer Name	Address	Phone Number	Entered
▼	61	Tester, John	800 Oak Ridge Tpke Oak Ridge TN, 37830	(111) 111-1111	10/10/2012 12:01:45 PM
▼	128	DAYNE, RONALD	123 MAIN ST. Madison WI, 53703	(111) 111-1111	2/11/2013 9:52:33 AM
▼	136	MO, MO	2008 Legend Ct Jefferson City MO, 65101	(111) 111-1111	2/14/2013 10:18:35 AM
▼	164	Test, Connecticut	69 Wetmore Ave Winsted CT, 06098	(111) 111-1111	6/12/2013 10:22:20 AM
▼	193	Test, Wisconsin	2045 Kensington St Janesville WI, 53546	(111) 111-1111	6/25/2013 9:20:09 AM
▼	229	Test, Brett	800 Oak Ridge Tpke Oak Ridge TN, 37830	(345) 345-3453	5/7/2015 7:45:24 AM
▼	247	HILL, DEREK	623 GRASSLANDS VILLAGE CIR Lakeland FL, 33803	(888) 888-8888	6/30/2015 1:06:36 PM
▼	696	Testt, Test	800 Oak Ridge Tpke Oak Ridge TN, 37830	(865) 222-2222	12/17/2015 1:34:16 PM
▼	950	htstbd, test	1465 Overton Ln Knoxville TN, 37923	(234) 234-2343	9/22/2016 9:08:18 AM

4. ****IN THE COMMENTS SECTION OF THE BIND REQUEST**** It is ok to submit a bind request if the figures do not match what you are wanting to bind. As long as the comments confirm what you are requesting we will bind accordingly. Confirm the carrier name, effective date, payment plan, payment type (card, eft), premium, and what email to send the documents to if different from the email we have on file. (Example: Please bind Safeco 12 month policy paid in full $950. effective 1-1-17 by eft, send docs to johndoe@ins.com). The reason to confirm things in the comments section is when you make changes to quotes or if things do not match up it will help eliminate the room for error in your binds.

5. Complete the bind request form and click "Send bind request form" When we receive the bind request we will issue the policy and email you the documents.

Policy Information		Payment Options	
Quote ID:	37559866	Premium:	950
Named Insured:	Phillip Sear	Down Payment:	125
LOB:	AUT: Auto Owners	Payment Plan:	Monthly EFT Ect
Carrier:	Safeco	Payment Option:	EFT
Effective Date:	02/01/2016	Setup future automatic payments for this policy?:	
Current Date:	01/13/2017	**EFT Information**	
Time of quote: ❓	9:00:00	Name On Account:	
Additional Information		Bank Name:	
Additional Interest:	None	Routing Number:	
		Account Number:	
		Comments:	
			Send Bind Request Form