Quotes & Applications (Quote & eApp)

In addition to providing quoting and e-application for Health Products (Medicare) directly in the platform, Integrity now provides in-platform Life Product quotes (Final Expense) as well as as well as Single Sign On (SSO) links to certain Final Expense carrier websites for applications.

Start a Quote

All Quotes start from a Contact record. A Quote can be started from the Contact List screen by clicking or tapping the three dots at the end of the Contact record's row, then clicking or tapping Start a Quote.

From the Contact Details screen, click or tap the Start a Quote button on the top bar.

Choose Quote Type

The agent will be prompted to choose which Product Type to quote – Life (Final Expense) or Health (Medicare).

The agent can choose not to see the Choose Quote Type prompt in future by clicking or tapping "Don't show me this again." They can also adjust their Selling Preferences on the Account page at any time.

After they choose the Quote Type, the agent will be taken to the Quote flow for that product.