

Back

Change Product

Reinstate

Extend

Convert

Reverse Conversion

Renew

Cancel

Disposition

Disclosure

Product Summary

Terms & Condition

Endorsement

Edit Customer Information

Contract # 12345789

Total Protect Warranty

Bank of America

Verbal Claim

OFF

Balance Due: \$80.00
12/1/15

| Status | Start Date | End Date | Deductible | Coverage Limit | Authorized Amnt | Premium | Total AmntDue |
|--------|------------|------------|------------|----------------|-----------------|----------|---------------|
| Active | 01/27/2015 | 01/27/2016 | \$500.00 | \$500.00 | \$500.00 | \$500.00 | \$200.00 |

Customer Information

Homer Simpson
Mobile: 322-223-4433
Email: hsimpson@aol.com

Property Address

888 Maint Street
Austin, TX 333189

Mailing Address

888 Maint Street
Austin, TX 333189

Billing Address

888 Maint Street
Austin, TX 333189

Coverage

Billing

Activity Stream

Attached Files

Contacts

Service Request Type

| Source of Enrollment | Client | ID | Description | Expiration |
|-------------------------------|-----------------|---------------------------------|---|------------|
| 12/15/14 Online Enrollment | Bank of America | 12354567894531313 213213.213 | Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum laoreet. | 12/14/15 |

Total Protect [Remove](#) | [Edit](#) | [Edit Renewal Date](#) | Auto Renew | Non-Renewal

\$80.00

| Start Date | End Date | Payment Frequencies | Payment Method | Deductible | |
|---|------------|---------------------|----------------|------------|-----------------------------------|
| 01/27/2015 | 01/27/2016 | 1 x month | Credit Card | \$25.00 | View Line Details |
| Coverage Name | Deductible | | | | |
| Coverage Name | \$25.00 | | | | |
| Coverage Name | | | | | |
| Coverage Name | \$25.00 | | | | |
| Coverage Name | | | | | |
| View All Coverage Lines | | | | | |

Add Ons - Fridge [Edit](#) | Auto Renew | Non-Renewal

\$80.00

| Start Date | End Date | Payment Frequencies | Payment Method | Deductible | |
|------------|------------|---------------------|----------------|------------|-----------------------------------|
| 01/27/2015 | 01/27/2016 | 1 x month | Credit Card | \$25.00 | View Line Details |

Options - Fridge [Edit](#) | Auto Renew | Non-Renewal

\$80.00

| Start Date | End Date | Payment Frequencies | Payment Method | Deductible | |
|------------|------------|---------------------|----------------|------------|-----------------------------------|
| 01/27/2015 | 01/27/2016 | 1 x month | Credit Card | \$25.00 | View Line Details |

Subtotal: \$30.00
Tax FL (6.5%): \$3.00

Grand Total: \$80.00

Contract # 12345789
Total Protect Warranty
 Bank of America

Verbal Claim

Balance Due: \$80.00
 12/1/15

| Status | Start Date | End Date | Deductible | Coverage Limit | Authorized Amnt | Premium | Total AmntDue |
|--------|------------|------------|------------|----------------|-----------------|----------|---------------|
| Active | 01/27/2015 | 01/27/2016 | \$500.00 | \$500.00 | \$500.00 | \$500.00 | \$200.00 |

Customer Information
 Homer Simpson
 Mobile: 322-223-4433
 Email: hsimpson@aol.com

Edit Renewal Date

Start Date: End Date:

g Address
 Maint Street
 n, TX 333189

Coverage | Billing | Activity Str

Source of Enrollment
 12/15/14
 Online Enrollment

Client
 Bank of Ame

Expiration
 12/14/15

Total Protect [Remove](#) | [Edit](#) | [Edit Renewal Date](#) | Auto Renew | Non-Renewal **\$80.00**

| Start Date | End Date | Payment Frequencies | Payment Method | Deductible | <input type="button" value="View Line Details"/> |
|---------------|------------|---------------------|----------------|------------|--|
| 01/27/2015 | 01/27/2016 | 1 x month | Credit Card | \$25.00 | |
| Coverage Name | Deductible | | | | |
| Coverage Name | \$25.00 | | | | |
| Coverage Name | | | | | |
| Coverage Name | \$25.00 | | | | |
| Coverage Name | | | | | |

Add Ons - Fridge [Edit](#) | Auto Renew | Non-Renewal **\$80.00**

| Start Date | End Date | Payment Frequencies | Payment Method | Deductible | <input type="button" value="View Line Details"/> |
|------------|------------|---------------------|----------------|------------|--|
| 01/27/2015 | 01/27/2016 | 1 x month | Credit Card | \$25.00 | |

Options - Fridge [Edit](#) | Auto Renew | Non-Renewal **\$80.00**

| Start Date | End Date | Payment Frequencies | Payment Method | Deductible | <input type="button" value="View Line Details"/> |
|------------|------------|---------------------|----------------|------------|--|
| 01/27/2015 | 01/27/2016 | 1 x month | Credit Card | \$25.00 | |

Subtotal: \$30.00
 Tax FL (6.5%): \$3.00

Contract # 12345789
Total Protect Warranty
Bank of America

Verbal Claim
OFF

Balance Due: \$80.00
12/1/15

| Status | Start Date |
|--------|------------|
| Active | 01/27/2015 |

Customer Information
 Homer Simpson
 Mobile: 322-223-4433
 Email: hsimpson@aol.com

Coverage Billing Activity Str

| Source of Enrollment | Client |
|-------------------------------|-------------|
| 12/15/14 Online Enrollment | Bank of Ame |

Reason for Non-Renewal

Select Reason Code

Additional Comments

| Premium | Total AmntDue |
|----------|---------------|
| \$500.00 | \$200.00 |

g Address
 Maint Street
 n, TX 333189

Expiration
 12/14/15

Total Protect [Remove](#) | [Edit](#) | [Edit Renewal Date](#) | Auto Renew | Non-Renewal **\$80.00**

| Start Date | End Date | Payment Frequencies | Payment Method | Deductible | |
|--|------------|---------------------|----------------|------------|--|
| 01/27/2015 | 01/27/2016 | 1 x month | Credit Card | \$25.00 | <input type="button" value="View Line Details"/> |
| Coverage Name | Deductible | | | | |
| Coverage Name | \$25.00 | | | | |
| Coverage Name | | | | | |
| Coverage Name | \$25.00 | | | | |
| Coverage Name | | | | | |
| <input type="button" value="View All Coverage Lines"/> | | | | | |

Add Ons - Fridge [Edit](#) | Auto Renew | Non-Renewal **\$80.00**

| Start Date | End Date | Payment Frequencies | Payment Method | Deductible | |
|------------|------------|---------------------|----------------|------------|--|
| 01/27/2015 | 01/27/2016 | 1 x month | Credit Card | \$25.00 | <input type="button" value="View Line Details"/> |

Options - Fridge [Edit](#) | Auto Renew | Non-Renewal **\$80.00**

| Start Date | End Date | Payment Frequencies | Payment Method | Deductible | |
|------------|------------|---------------------|----------------|------------|--|
| 01/27/2015 | 01/27/2016 | 1 x month | Credit Card | \$25.00 | <input type="button" value="View Line Details"/> |

Subtotal: \$30.00
 Tax FL (6.5%): \$3.00

Contract # 12345789

Total Protect Warranty
Bank of America

Customer Information

| | | | | |
|-----------------------|--------|----------------------------------|--------------------|----------------------|
| First Name | Middle | Last Name | | |
| Jonah | John | Grey | | |
| Property Address | | | Suite / Apt / Room | |
| 1245 Sw 75 Way | | | | |
| City | State | County | Zipcode | |
| Miami | FL | Dade County | 33186 | Edit |
| Phone Number | | | | |
| i.e. xxx-xxx-xxxx | Cell | <input type="checkbox"/> Primary | + | |
| Email | | | | |
| i.e domain@domain.com | Work | <input type="checkbox"/> Primary | + | |

Save & Continue

Contract # 12345789

Total Protect Warranty
Bank of America

Renewal Offers

Collateral

Terms & Conditions

Fulfillment

Touchpoints

Sales Verification

dd/mm of birth OR city of birth

[Upload Mail-in Renewal](#)

Which renewal offering influenced the customer to renew?

\$ Name of Offer

- Buy and Get Free x# Month of Optional Coverage
- \$125 Discount for qualifying purchase (new item)
- \$5 off per month with qualifying purchase
- Reduce Deductible by \$25

Select this Offer

[Email this Offer](#)

\$ Name of Offer

- Reduce Deductible (waive the 1st deductible)
- Discount Multi Year
- Buy and Get Free x# Month of Additional Coverage
- Buy and Get \$25 gift card
- Discount Don't Have an Item

Select this Offer

[Email this Offer](#)

\$ Name of Offer

- Buy and Get Gas Coupon (Redeem 1/Qtr total Value \$20)
- Discount Home Inventory
- Discount Don't Have an Item
- Discount Multi Year

Select this Offer

[Email this Offer](#)

Save & Continue

Back

Exit

Save

Save & Continue

Customer Information

Product Selection

Order Summary

Checkout

Complete

Contract # 12345789

Total Protect Warranty
Bank of America

Product Selection

Products

Cross Sell

4 Available Products:

Product Name

Highlights

| | | |
|---------------|---------------|---------------|
| Coverage Type | Coverage Type | Coverage Type |
| Coverage Type | Coverage Type | Coverage Type |
| Coverage Type | Coverage Type | Coverage Type |
| Coverage Type | Coverage Type | Coverage Type |

Restrictions

Limit: \$500.00
 Deductible: \$1500.00
 Dormancy: 30 days

Discounts

Free Gas Card

\$25.99 /m

Currently Selected

Product Name

Highlights

| | | |
|---------------|---------------|---------------|
| Coverage Type | Coverage Type | Coverage Type |
| Coverage Type | Coverage Type | Coverage Type |
| Coverage Type | Coverage Type | Coverage Type |
| Coverage Type | Coverage Type | Coverage Type |

Restrictions

Limit: \$500.00
 Deductible: \$1500.00
 Dormancy: 30 days

Discounts

Free Gas Card

\$25.99 /m

Select

Product Name

Highlights

| | | |
|---------------|---------------|---------------|
| Coverage Type | Coverage Type | Coverage Type |
| Coverage Type | Coverage Type | Coverage Type |
| Coverage Type | Coverage Type | Coverage Type |
| Coverage Type | Coverage Type | Coverage Type |

Restrictions

Limit: \$500.00
 Deductible: \$1500.00
 Dormancy: 30 days

Discounts

Free Gas Card

\$25.99 /m

Select

Product Name

Highlights

| | | |
|---------------|---------------|---------------|
| Coverage Type | Coverage Type | Coverage Type |
| Coverage Type | Coverage Type | Coverage Type |
| Coverage Type | Coverage Type | Coverage Type |
| Coverage Type | Coverage Type | Coverage Type |

Restrictions

Limit: \$500.00
 Deductible: \$1500.00
 Dormancy: 30 days

Discounts

Free Gas Card

\$25.99 /m

10% Off Paid Annually

Select

Save & Continue

Back

Exit

Save

Save & Continue

Customer Information

Product Selection

Order Summary

Checkout

Complete

Addons & Options

Save & Continue



Monthly Total

\$25.99

Annual Total

\$270.00

3 Payments

\$100.00

Coverage

Options










Incentives

Product Features:

15-Day Free Review†
24/7 Customer Service
6-Month Guarantee on Repairs
Easy Online Claims Process

- Product Transferable
- Dormancy: 30 Days

Coverage Items:

| Item | Qty | Each Add'l Item | Select |
|---|-------------|------------------|--|
|  Coverage Name Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum | Included: 2 | \$4.00 per month | <input type="button" value="-"/> <input type="text" value="1"/> <input type="button" value="+"/> |
|  Coverage Name Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum | Included: 2 | \$4.00 per month | <input type="button" value="-"/> <input type="text" value="1"/> <input type="button" value="+"/> |
|  Coverage Name Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum | Included: 2 | \$4.00 per month | <input type="button" value="-"/> <input type="text" value="1"/> <input type="button" value="+"/> |
|  Coverage Name Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum | Included: 2 | \$4.00 per month | <input type="button" value="-"/> <input type="text" value="1"/> <input type="button" value="+"/> |
|  Coverage Name Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum | Included: 2 | \$4.00 per month | <input type="button" value="-"/> <input type="text" value="1"/> <input type="button" value="+"/> |
|  Coverage Name Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum | Included: 2 | \$4.00 per month | <input type="button" value="-"/> <input type="text" value="1"/> <input type="button" value="+"/> |
|  Coverage Name Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum | Included: 2 | \$4.00 per month | <input type="button" value="-"/> <input type="text" value="1"/> <input type="button" value="+"/> |
|  Coverage Name Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum | Included: 2 | \$4.00 per month | <input type="button" value="-"/> <input type="text" value="1"/> <input type="button" value="+"/> |
|  Coverage Name Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean euismod bibendum | Included: 2 | \$4.00 per month | <input type="button" value="-"/> <input type="text" value="1"/> <input type="button" value="+"/> |

Save & Continue

Contract # 12345789

Total Protect Warranty
Bank of America

Your Order Summary

[+ Add Another Product](#)

Product Name | [Remove](#) | [Edit](#) | [Edit Renewal Date](#) | Auto Renew | Non-Renewal **\$25.99/m**

Deductible: \$500 | Coverage Limit: \$300 | Dormancy: 30 Days

| | | | | | |
|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
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| Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor |
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| Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor |

Add Ons | [Edit](#) | [Edit Renewal Date](#) | Auto Renew | Non-Renewal **\$24.00/m**

| | |
|---------------|--------|
| Name of addon | \$8.00 |
| Name of addon | \$8.00 |
| Name of addon | \$8.00 |

Options | [Edit](#) | [Edit Renewal Date](#) | Auto Renew | Non-Renewal **\$24.99/m**

| | |
|---------------|--------|
| Name of addon | \$8.00 |
| Name of addon | \$8.00 |
| Name of addon | \$8.00 |

Incentive Plan | [Edit](#) | [Edit Renewal Date](#) | Auto Renew | Non-Renewal

| | |
|---------------|--------|
| Free Gas Card | \$0.00 |
|---------------|--------|

Total Savings **-\$2.00**

| | |
|--------------|---------|
| Name of Item | -\$2.00 |
|--------------|---------|

Subtotal: \$61.00

Tax 6.5% (FL): \$2.50

Grand Total: \$75.99 / m

Save & Continue

Back

Exit

Save

Save & Continue

Customer Information

Product Selection

Order Summary

Checkout

Complete

Contract # 12345789

Total Protect Warranty
Bank of America

Your Order Summary

[+ Add Another Product](#)

Product Name | [Remove](#) | [Edit](#) | [Edit Renewal Date](#) | Auto Renew | Non-Renewal **\$25.99/m**

Deductible: \$500 | Coverage Limit: \$300 | Dormancy: 30 Days

| | | | | | |
|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor |
| Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor |
| Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor |
| Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor |
| Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor | Lorem ipsum dolor |

Add Ons | [Edit](#) | [Edit Renewal Date](#) **\$24.00/m**

| | |
|---------------|--------|
| Name of addon | \$8.00 |
| Name of addon | \$8.00 |
| Name of addon | \$8.00 |

Options | [Edit](#) | [Edit Renewal Date](#) | Auto Renew | Non-Renewal **\$24.99/m**

| | |
|---------------|--------|
| Name of addon | \$8.00 |
| Name of addon | \$8.00 |
| Name of addon | \$8.00 |

Incentive Plan | [Edit](#) | [Edit Renewal Date](#) | Auto Renew | Non-Renewal

| | |
|---------------|--------|
| Free Gas Card | \$0.00 |
|---------------|--------|

Total Savings **-\$2.00**

| | |
|--------------|---------|
| Name of Item | -\$2.00 |
|--------------|---------|

Subtotal: \$61.00

Tax 6.5% (FL): \$2.50

Grand Total: \$75.99 / m

Save & Continue

Edit Renewal Date

Start Date End Date

📅 📅

Cancel
Done

Back

Exit

Save

Save & Continue

Customer Information

Product Selection

Order Summary


Checkout

Complete

Contract # 12345789

Total Protect Warranty
Bank of America

Customer Information: Mr. Dos Equis

 Add Additional Contacts

Customer Information

Cell: 123-222-2222
Home: 123-222-2222

domain@domain.com
domain2@domain.com

Property Address

1234 SW 123 St
Miami, FL 33186
Broward County

Mailing Address

1234 SW 123 St
Miami, FL 33186
Broward County

Billing Address

1234 SW 123 St
Miami, FL 33186
Broward County

Payment Frequencies

- Monthly \$43.95
- Annual \$527.40
10% off if paid annually
- 3 x Year \$89.99

Payment Information

Credit Card

Bank Account

3rd Party

Split Payment

Name on Card

Dos Equis

Card Number

.....7568

Exp Date

01/16

CVV / Security Code

...

Renew

Your Order is Complete:

New Warranty Number:

#123403420420382

Plan Details:**TotalProtect Combo Plan****Effective Date:**

03/10/2015

Expiration**Date:**03/10/2015**Your Total:**

\$75.99 /month

Deductible:\$125

Covered Property:1234 SW 123 CT
Miami, FL 33186**Customer Information**Homer Simpson
Mobile: 322-223-4433
Email: hsimpson@aol.com**Property Address**888 Maint Street
Austin, TX 333189**Mailing Address**888 Maint Street
Austin, TX 333189**Billing Address**888 Maint Street
Austin, TX 333189**Customer May Also Be Interested In:****Product Name**

| Highlights | | | Restrictions | Discounts | | |
|---------------|---------------|---------------|-----------------------|---------------|-------------------|---------------|
| Coverage Type | Coverage Type | Coverage Type | Limit: \$500.00 | Free Gas Card | \$25.99 /m | Select |
| Coverage Type | Coverage Type | Coverage Type | Deductible: \$1500.00 | | | |
| Coverage Type | Coverage Type | Coverage Type | Dormancy: 30 days | | | |
| Coverage Type | Coverage Type | Coverage Type | | | | |

Product Name

| Highlights | | | Restrictions | Discounts | | |
|---------------|---------------|---------------|-----------------------|---------------|-------------------|---------------|
| Coverage Type | Coverage Type | Coverage Type | Limit: \$500.00 | Free Gas Card | \$25.99 /m | Select |
| Coverage Type | Coverage Type | Coverage Type | Deductible: \$1500.00 | | | |
| Coverage Type | Coverage Type | Coverage Type | Dormancy: 30 days | | | |
| Coverage Type | Coverage Type | Coverage Type | | | | |

Product Name

| Highlights | | | Restrictions | Discounts | | |
|---------------|---------------|---------------|-----------------------|---------------|-------------------|---------------|
| Coverage Type | Coverage Type | Coverage Type | Limit: \$500.00 | Free Gas Card | \$25.99 /m | Select |
| Coverage Type | Coverage Type | Coverage Type | Deductible: \$1500.00 | | | |
| Coverage Type | Coverage Type | Coverage Type | Dormancy: 30 days | | | |
| Coverage Type | Coverage Type | Coverage Type | | | | |