

# Purchase Policy Instructions

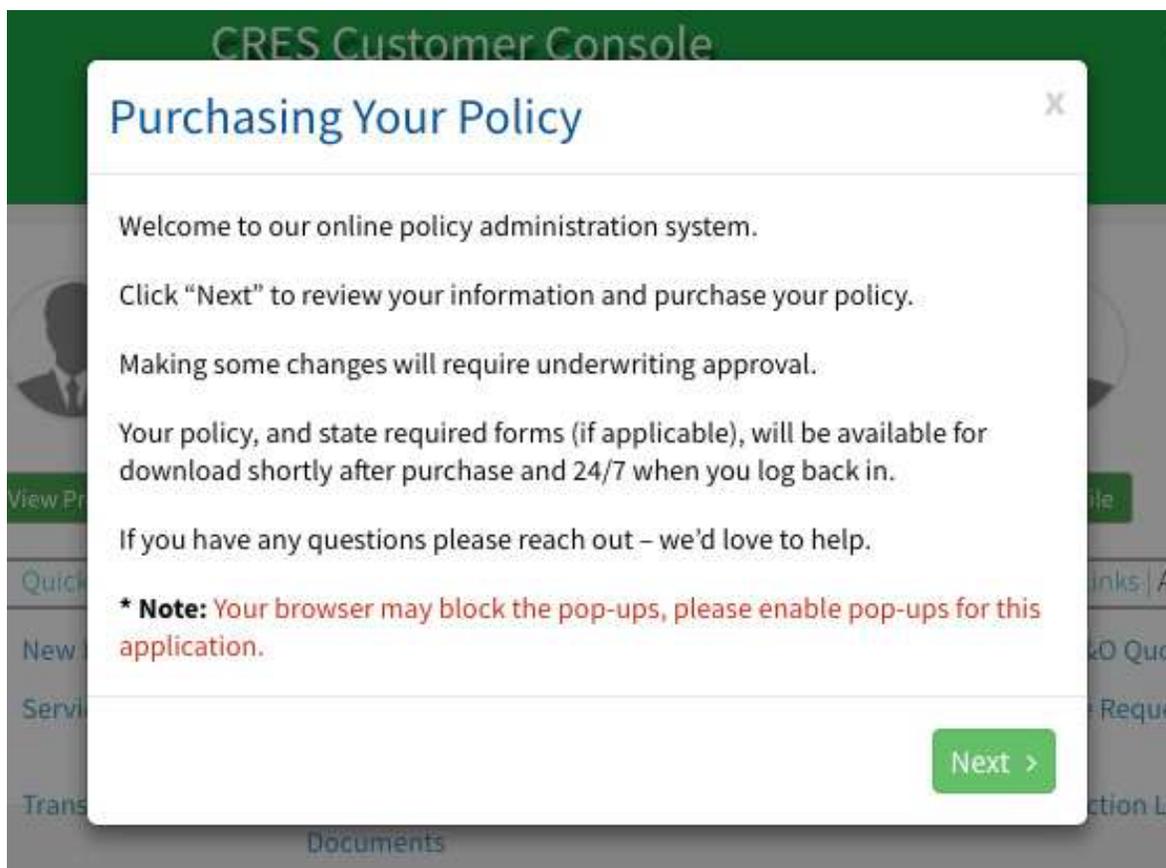
You'll renew using your Personalized Renewal Link.

The Renewal link will take you to our online Customer Console – where you'll have 24/7 access to your policy documents, quotes, risk management information, and more.

To start, click on your Personalized Renewal Link in your renewal email and log into your CRES account, then follow the step-by-step instructions below.

Once logged in, you'll see the "Purchasing Your Policy" pop-up.

After reading the instructions, click the Next button and a new tab with your Quotation Summary will open.



After reviewing the Quotation Summary, click the **Confirm Info For Quote** button located at the top right corner.

Quotation Summary

Owner : HW Company : Multiple Territory Manager : Unassigned | NA

Review your information then select the appropriate button near the top or bottom right side of the page.

Quotation Basic Details

Submission ID	Account Executive
Start Date	End Date
Prior Act Date	Primary License Number   State   Type

Quotation Notes

Hide

Coverages

Claim Limit	\$1,000,000	Aggregate Limit	\$1,000,000
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Please review each page until you get to the package selection page and click on “Customize” to make your selection. When reviewing the Coverages page, those not grayed out can be changed using the dropdown. To see the new cost, click the “Calculate” button. Click on the coverage name (i.e., “Discrimination”) to see a description of the coverage. Select “Buy Now” to purchase your policy.

Coverages

1 Select Activity

2 Activity Question

3 Entity Information

4 Entity Details

5 Coverages

Calculate

HDI Global Insurance Company

Annual \$

Hide Info Buy Now

Carrier	HDI Global Insurance Company
Premium	\$
Risk Management Fee	\$
Membership Fee	\$
<b>Total Cost</b>	<b>\$</b>

To comply with state licensing requirements, this policy cannot be cancelled.

Policy Features

On the Documents page click the  icon below Action if you want to download your proposal.

### Quotation Documents

Owner : CRES  
HW Company : Multiple

Territory Manager : Unassigned | NA

Quote No. : \_\_\_\_\_ Business Type : \_\_\_\_\_ Product : \_\_\_\_\_ Status : \_\_\_\_\_  
Effective Date : \_\_\_\_\_ Expiration Date : \_\_\_\_\_ Owner : \_\_\_\_\_  
Carrier : \_\_\_\_\_ Secondary Owner : \_\_\_\_\_

Uploaded Documents

Document Name	Created On	Document Type	eSign Required	Action
			Required	

[< Back](#) [Finalize Quote & Pay >](#)

Otherwise click Finalize Quote & Pay and you will arrive on a DocuSign page to e-sign your policy.

Click in the box to agree to use electronic records and signature and click on "Continue". Then click start and the first thing to do is adopt your signature style.

### DocuSign

Owner : CRES  
HW Company : Multiple

Territory Manager : Unassigned | NA

Please Review & Act on These Documents

 IS Dept  
CRES Insurance Services, LLO

 **CRES**<sup>SM</sup>  
A Gallagher Company  
Powered by DocuSign

Please read the Electronic Record and Signature Disclosure.  
 I agree to use electronic records and signatures.

[CONTINUE](#) [OTHER ACTIONS](#) ▾

DocuSign Envelope ID: 185DB23C-09C3-4027-BE05-36694AD99E20



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Change Language - English (US) | Copyright © 2016 DocuSign Inc. | v2F

After signing your application and other documents, you'll choose your payment option (EFT, credit or debit card) and enter your payment information.

The screenshot shows the 'Payment Options' form. At the top, it displays 'Owner : CRES' and 'Territory Manager : Unassigned | NA'. Below this, there are fields for 'Quote No.', 'Invoice Amount', 'Product', 'On Account Balance Amount', 'Total Amount', and 'Payment Option'. The 'Payment Option' section is expanded, showing four radio button options: 'Credit card / Checking Account' (selected), 'Pay with Saved Account (3rd party processing fee may apply)', 'Pay with New Credit/Debit card (3rd party processing fee may apply)', and 'Pay with New Checking Account'. At the bottom of the form, there are two buttons: '< Back' and 'Confirm & Pay >'.

\*Credit cards have a processing fee. Checking is free.

After your payment is processed, you will arrive on the confirmation page.

Click on Finish to arrive at the Policy Details page where, under the Communications section, you can download your Declarations page.

Clicking the  button under Action will start the download.

Once a policy is purchased, the receipt email is sent with declarations page. Within 24 hours you will receive a follow-up email with full policy documents, state certificate (if applicable\*), and an overview of CRES benefits.

These can be accessed 24/7 by logging into the Customer Console on [cresinsurance.com](http://cresinsurance.com)

The screenshot shows the 'Policy Details' page. At the top, there are navigation tabs: 'Update', 'Pay', 'Create Renewal Quote', 'Cancellation Calculator', 'Full Coverage', 'Mid-Term', 'History', 'New Tech', and 'Communications'. Below the tabs, it displays 'Owner : CRES' and 'Territory Manager : Unassigned | NA'. The main content area is divided into two sections: 'Policy' and 'Source Quotation'. The 'Policy' section includes fields for 'Quote No.', 'Effective Date', 'Line of Business', 'Assigned To', 'Carrier', 'Secondary Owner Name', 'Claims Limit', 'Deductible', 'Risk Management Fee', and 'Safe pay'. The 'Source Quotation' section includes fields for 'Status', 'Expiration Date', 'Product', 'Owner', 'Rating Type', 'Aggregate Limit', 'Premium', and 'Membership Fee'. Below these sections, there is a 'Contact Person' table with columns for 'Name', 'Nick Name', 'Email', 'Phone', 'Description', 'Primary (CUST)', 'Association', and 'Action'. The 'Communications' section shows a table with columns for 'Date', 'Type', 'User', 'Details', and 'Action'. The table contains three rows of data, all with a date of '09-19-2018' and a 'Document' type. The 'Details' column contains document IDs: '0018091963', '0018091960', and '0018091960'. The 'Action' column contains icons for 'Download', 'Print', and 'Delete'. At the bottom of the page, it says 'Showing 1 to 4 of 4 entries' and has 'Previous' and 'Next' buttons.

Thank you for your business!

Don't forget, we are here to help after your purchase as well. Reach out if you have questions about your policy or need attorney advice on a transaction. Our Risk Management has no deductible to pay and does not count as a claim, we just want to help you prevent a claim.