

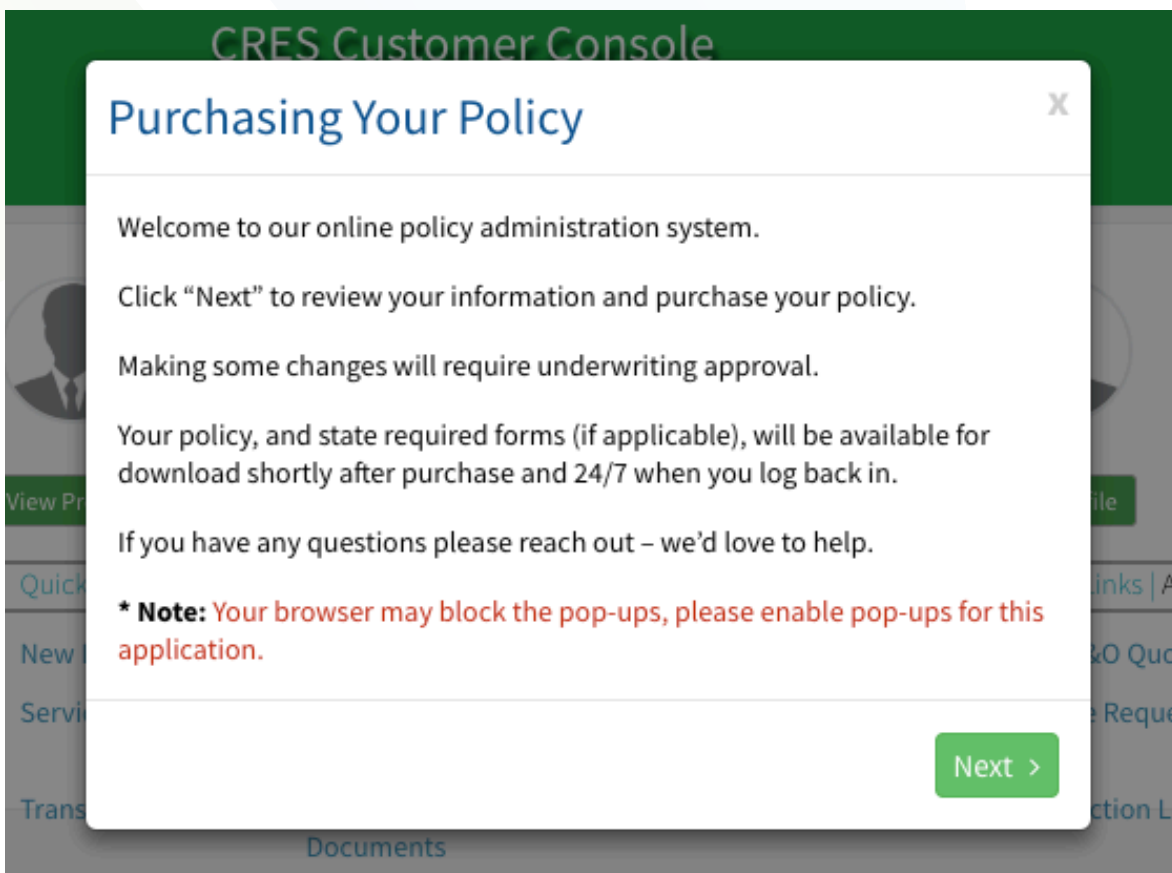
Purchase Policy Instructions

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 follow the step-by-step instructions below.

Your link will take you to the Purchasing Your Policy pop-up. After reading the instructions click the Next button and a new tab, Quotation Summary, will open.



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


The screenshot shows the 'Quotation Summary' page in the CRES Insurance system. The page has a green header with the CRES Insurance logo and a 'Call Us: (800)880-2747' button. A left sidebar contains navigation options like Overview, Detail, Quotations, Policies, Transaction Ledger, Finance, Permit History, Claims, RM Tickets, Service Requests, Wallet, and Documents. The main content area is titled 'Quotation Summary' and includes a 'Confirm Info For Quote' button. Below the title, there are fields for 'Owner: HW Company: Multiple' and 'Territory Manager: Unassigned | NA'. A message reads: 'Review your information then select the appropriate button near the top or bottom right side of the page.' The page is divided into sections: 'Quotation Basic Details' with fields for Submission ID, Start Date, Prior Act Date, Account Executive, End Date, and Primary License Number | State|Type; 'Quotation Notes' with a scrollable text area; and 'Coverages' with a table showing 'Claim Limit' and 'Aggregate Limit' both set to '\$1,000,000'. A 'Hide' button is visible at the bottom right of the coverages section.

Please review each page until you get to the coverages page. Coverage not greyed 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.


The screenshot shows the 'Coverages' page in the CRES Insurance system. The page has a green header with the CRES Insurance logo and a 'Call Us: (800)880-2747' button. A left sidebar contains navigation options like Select Activity, Activity Question, Entity Information, Entity Details, and Coverages. The main content area is titled 'Coverages' and includes a 'Calculate' button. Below the title, there is a section for 'HDI Global Insurance Company' with a dropdown menu set to 'Annual' and a '\$' symbol. A 'Buy Now' button is circled in red. Below this, there is a table with the following data:

Carrier	HDI Global Insurance Company
Premium	\$
Risk Management Fee	\$
Membership Fee	\$
Total Cost	\$

Below the table, there is a note: 'To comply with state licensing requirements, this policy cannot be cancelled.' Below the note, there is a 'Policy Features' section.

On the Documents page click the  icon below Action if you want to download your proposal. Otherwise click Finalize Quote & Pay and you will arrive on a DocuSign page to e-sign your policy. After signing your application and other documents, you'll choose your payment option (EFT, credit or debit card) and enter your payment information.

After your payment is processed, you will go to the confirmation page. Click on Finish to arrive at the Policy Details page where, under the Communications section, you can download your Declarations page and, if applicable, your State required proof of coverage.

Clicking the  button under Action will start the download. Within 15 minutes your complete policy will be available for download. These can be accessed 24/7 by logging into the Customer Console on cresinsurance.com

Policy Details

Update +
Pay
Create Renewal Quote
Cancellation Calculator
Tail Coverage
Mid-Term
History
New Task
Communications-

Owner : CRES Territory Manager : Unassigned | NA
 HW Company : Multiple
 UW access only : NO

Policy

Quotation No. :
 Effective Date :
 Line of Business :
 Assigned To :
 Carrier :
 Secondary Owner Name :
 Claim Limit :
 Deductible :
 Risk Management Fee :
 Safe-pay :

LISA Quotation ID :
 LISA Transaction Type :

Source Quotation

Status : Issued
 Expiration Date :
 Product : Errors and Omissions
 Owner : CRES
 Rating Type : Headcount
 Aggregate Limit :
 Premium :
 Membership Fee :








LISA Option ID : -
 Underwriter : -
 No. of Permit History Reports : 25

Contact Person New Policy MySelf

Name	Nick Name	Email	Phone	Description	Primary (CUST)	Association	Action
No Record Found.							

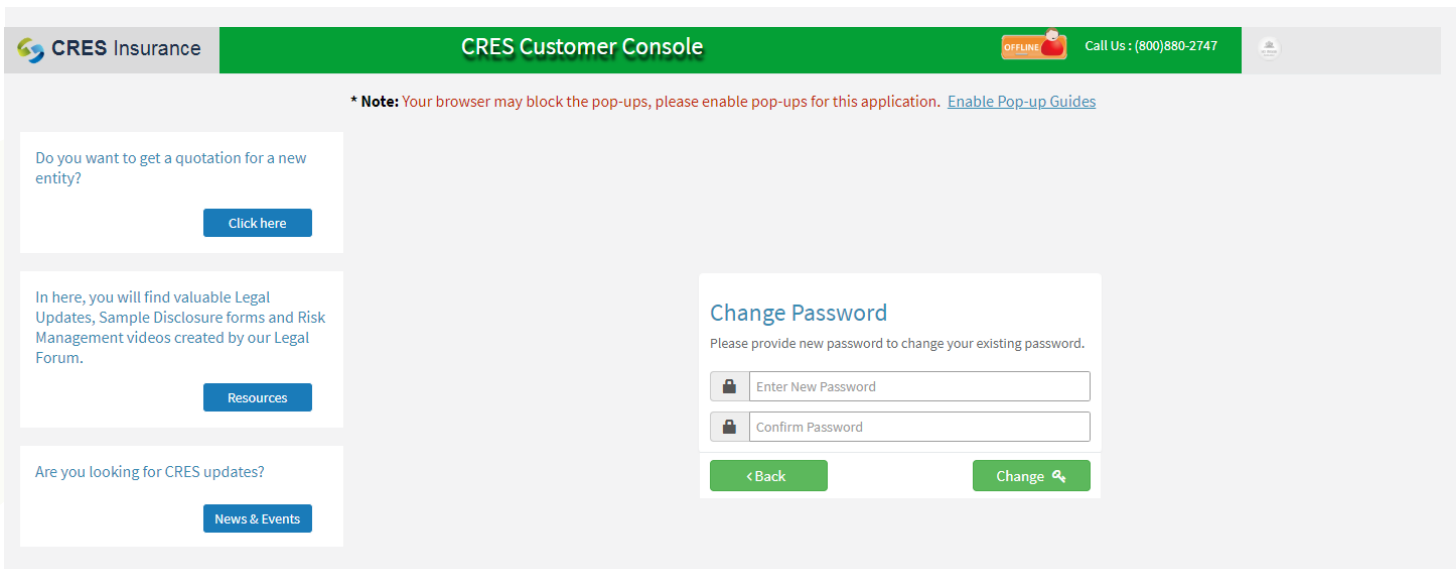
Communications

Show entries Search:

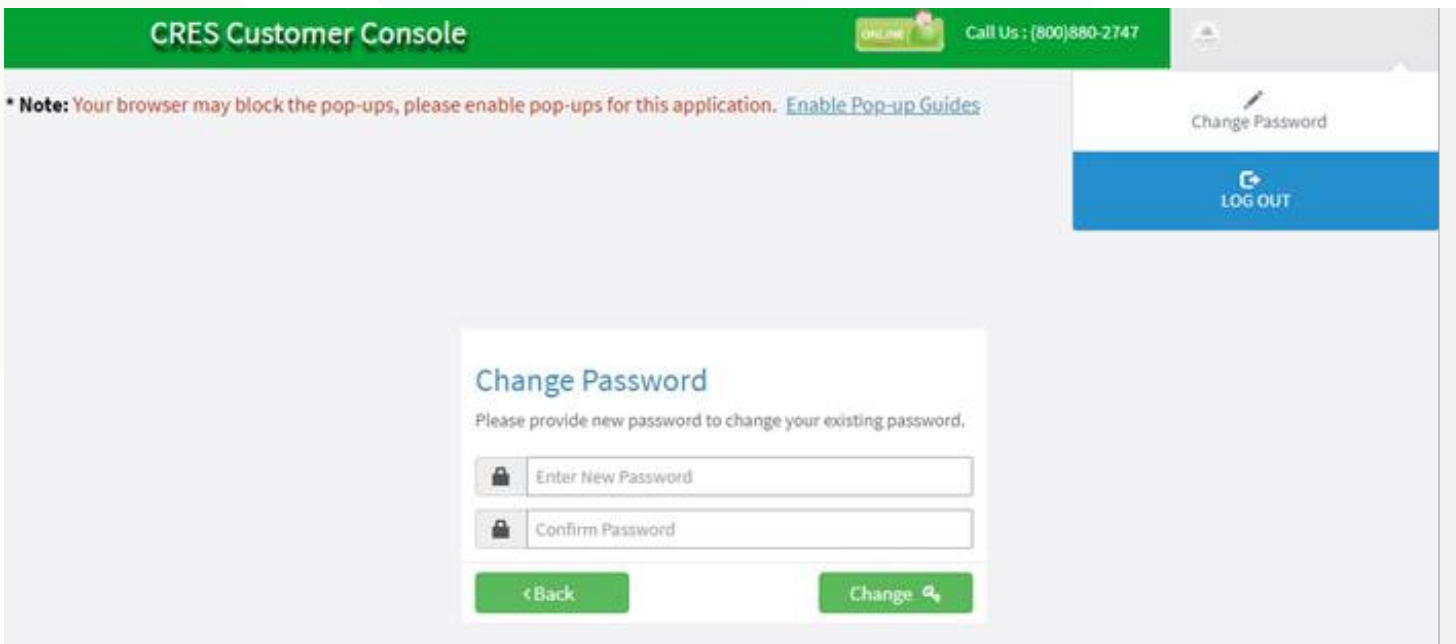
Date	Type	User	Details	Action
09-19-2018	Email			
09-19-2018	Document		2018091963	 No 
09-19-2018	Document		2018091960	 No 
09-19-2018	Document		2018091980	 Yes 

Showing 1 to 4 of 4 entries Previous **1** Next

If you have never changed your password, click on the first tab, the Purchasing Your Policy pop-up. Click the "X" on the top right of the pop-up to close it.



Find your name on the top right of the Customer Console page and click it. Select Change Password and you will be prompted to enter a new password. When done click Change. You are all set!



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.