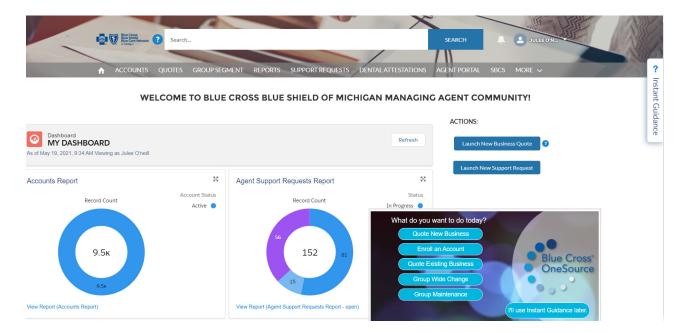
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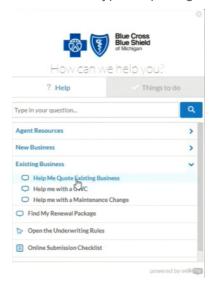


OneSource: How to complete an existing business quote

1. Login to the OneSource Dashboard. Enter the customer ID in the search bar. Click "Search."



2. Select the type of quoting needed.

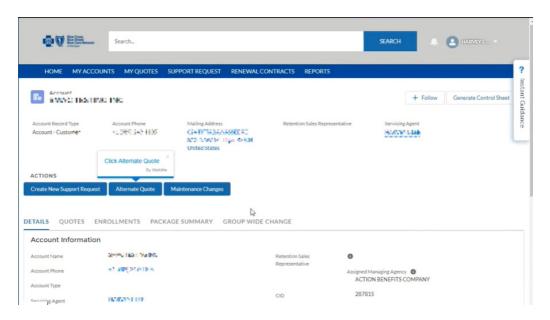


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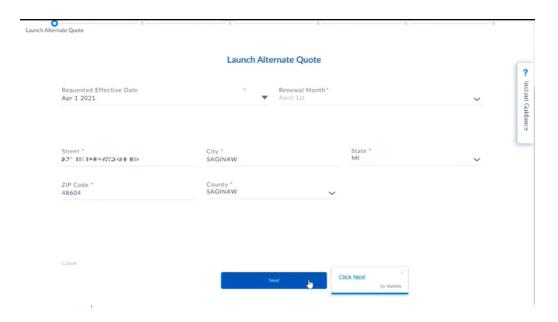


OneSource: How to complete an existing business quote

3. Click "Alternate Quote."



4. Verify fields have been entered correctly. Click "Next."

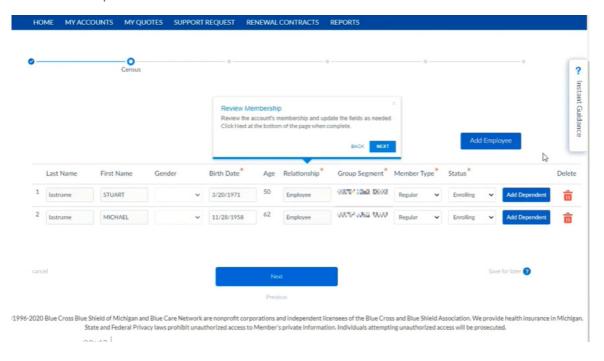


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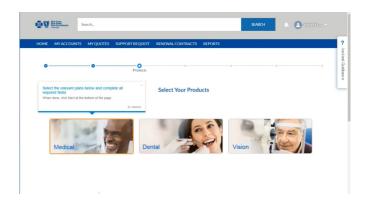


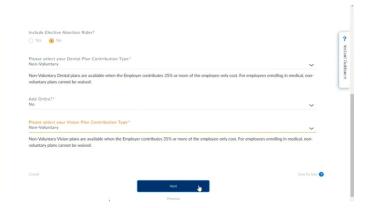
OneSource: How to complete an existing business quote

5. If new employees need to be added or their status needs to be changed, click "Add Employee." Review all membership and click "Next."



6. Select all relevant plans and complete all required fields. Click "Next."



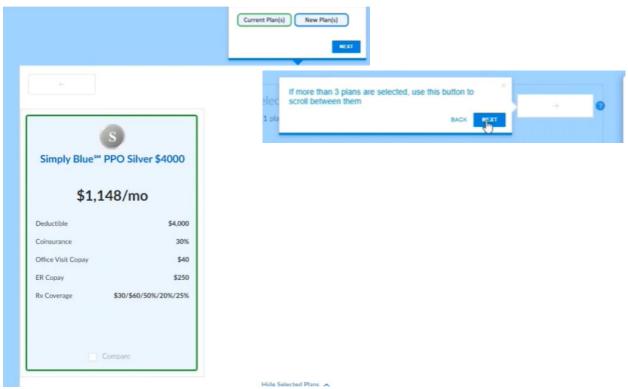


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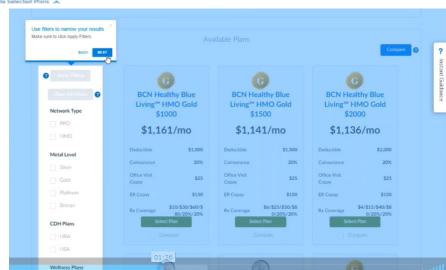


OneSource: How to complete an existing business quote

7. To see alternate plan options, click "Next."



8. Use filters to narrow the results. Select plans to compare.

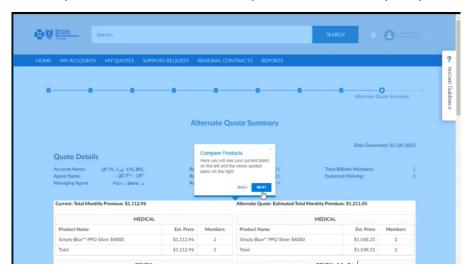


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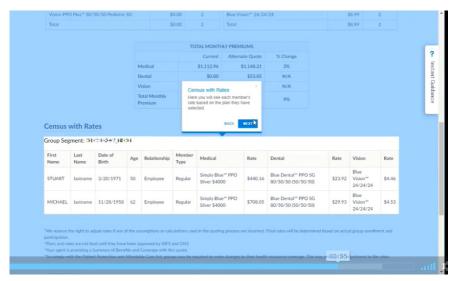


OneSource: How to complete an existing business quote

9. Group information is listed in the quote details. To compare products, click "Next."



10. To compare the monthly premiums between the selected plans, click "Next." The census rates will appear. Click "Next."

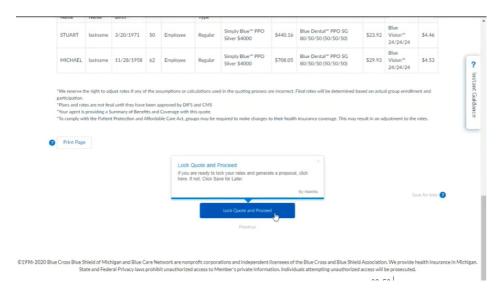






OneSource: How to complete an existing business quote

11. Click "Lock quote and proceed." There is an option to print a quick quote reference.



12. Select the available documents you would like. Enter your email address. Click on "Get Quote."

