



## Commercial Proposal Instructions

### Information/Recommendations – Please Read Before Proceeding

- In HawkSoft, each of the lines of business is a separate template document. You can choose to create a new template document for each line of business or edit the existing templates, in which case, you will be overwriting the default.
- The Cover Letter and the Post Letter (Summary Page) are separate templates as well.
- **Highly recommended:** Consider having multiple templates for the same line of business if the exclusions and limitations are considerably different per carrier (see example below).
  - Commercial Property – West Bend
  - Commercial Property – Acuity
  - Commercial Auto – West Bend
  - Commercial Auto – Acuity
- **Required if you want the formatting to work:** Adjust the margins of all the templates to .5 inch for right, left, top and bottom. *Within the document editor, this can be changed by going to File->Page Setup.*
- **It's all in the details:** Anywhere on a document where it lists *Exclusions and limitations*, list your carrier/state specific exclusions and limitations. We specifically did not provide these for a template that could be used by agencies spanning the country and with a mix of different carriers.
- Make this template your own. If you prefer different formatting or font, change it in any way you like. This is just a starting point.
- There are two methods of getting these documents set up in your system. The details for each are listed below.
  - Copy and Paste Content Method
  - OR
  - Import Method

### Copy and Paste Content Method

1. The templates that you need are contained within this document (see subsequent pages). Highlight and copy (Ctl+C) the portion of this document that will go in the template you are working on.
2. In HawkSoft, click on the Cog icon in the upper right corner of the main screen and select **Correspondence Templates**.
3. Click on the **Proposals** tab on the left.
4. **Add** or **Edit** the template you want to work on.
5. Paste (Ctl+V) the content from this document into the HawkSoft template.
6. Make your modifications and customizations to the document.
7. **Save & Close.**
8. Repeat this process for each line of business template as well as the Cover Letter and Post Letter.

## Import Method

1. Documents are available on the HUG website under Download Templates. When you click this button, a file called HUG-Sample-Commercial-Proposal-Templates.zip will download to your computer's Download directory. This ZIP file contains a separate document template for each line of business as well as the first and last pages of the proposal.
2. In HawkSoft, click on the Cog icon in the upper right corner of the main screen and select **Correspondence Templates**.
3. Click on the **Proposals** tab on the left.
4. Click the **Import** button.
5. Browse to the location of the download ZIP file and click **OK**.
6. A message **Imported 8 template(s)** will appear. Click **OK**.
7. The templates all start with **HUG Sample...** in the name. Use the **Rename** button to change the document name.
8. Use the **Edit** button to make your modifications and customizations to the document.
9. **Save & Close**.
10. Repeat this process for each line of business template as well as the Cover Letter and Post Letter.

***Insert agency logo or a picture of insured's risk here***

**Renewal Date: <<Input:renewal date>>**

**<<Cli\_BusName:PC>>**

**<<Cli\_Name1:PC>>**

**<<Cli\_Address:PC>>**

**<<Cli\_Address2:PC>>**

**<<Cli\_City:PC>>, <<Cli\_State>> <<Cli\_Zip>>**

**Business Phone: <<Cli\_PrimPh>>**

**Cell Phone: <<Cli\_CellPh>>**

**Fax Number: <<Cli\_Fax>>**

**Email: <<Cli\_PrimaryEmail>>**

**<<Agency\_Name>>**

**<<Agency\_Address>>**

**<<Agency\_City>>, <<Agency\_State>> <<Agency\_Zip>>**

**Phone: <<Agency\_Phone>>**

**Fax: <<Agency\_Fax>>**

**Email: <<User\_Email>>**

**Proposed by: <<User Name>>**

**Information contained in this proposal is intended to provide you with a brief overview of the coverages provided for reference purposes only. It is not intended to provide you with all the policy exclusions, limitations, and conditions. The precise coverage afforded is subject to the terms, conditions, and exclusion, of the policies issued.**

<<Today>>  
<<Agency\_Name>>

Company: <<Pol\_Company>>  
<<Pol\_ExpireDate>>  
Policy #: <<Pol\_PolNum>>

Effective: <<Pol\_EffectDate>> to

## COMMERCIAL GENERAL LIABILITY

<<Cli\_BusName>>

### Coverage Limits

<<Coverage List:CGL>>

**Exclusions & Limitations:** (See policy to review exclusions and limitations)

Company: <<Pol\_Company>>  
<<Pol\_ExpireDate>>  
Policy #: <<Pol\_PolNum>>

Effective: <<Pol\_EffectDate>> to

## COMMERCIAL PROPERTY

<<Cli\_BusName>>

### **Premises Location**

<<Location List>>

### **Property / Premises Coverages:**

<<Coverage List:PROP>>

### **Additional Interest**

<<AI List:LOB=PROP>>

**Exclusions & Limitations:** (See policy to review exclusions and limitations)

<<Today>>  
<<Agency\_Name>>

Company: <<Pol\_Company>>  
<<Pol\_ExpireDate>>  
Policy #: <<Pol\_PolNum>>

Effective: <<Pol\_EffectDate>> to

## COMMERCIAL UMBRELLA

<<Cli\_BusName>>

<<Coverage List:CUMBR>>

**Exclusions & Limitations:** (See policy to review exclusions and limitations)

<<Today>>  
<<Agency\_Name>>

Company: <<Pol\_Company>>  
<<Pol\_ExpireDate>>  
Policy #: <<Pol\_PolNum>>

Effective: <<Pol\_EffectDate>> to

## **BUSINESS AUTO**

<<Cli\_BusName>>

### **Vehicle List**

<<Vehicle List>>

<<Coverage Summary List:Colors=#000000|#FFFFFF:IncDed=True:IncPremium=False>>

### **Driver List**

<<Driver List>>

### **Additional Insured and / or Loss Payee**

<<AI List:LOB=AUTOB>>

**Exclusions & Limitations:** (See policy to review exclusions and limitations)

<<Today>>  
<<Agency\_Name>>

Company: <<Pol\_Company>>  
<<Pol\_ExpireDate>>  
Policy #: <<Pol\_PolNum>>

Effective: <<Pol\_EffectDate>> to

## **WORKERS COMPENSATION**

<<Cli\_BusName>>

<<Coverage List:WORK>>

<<Today>>  
<<Agency\_Name>>

Company: <<Pol\_Company>>  
<<Pol\_ExpireDate>>  
Policy #: <<Pol\_PolNum>>

Effective: <<Pol\_EffectDate>> to

## COMMERCIAL CONTRACTORS EQUIPMENT

<<Cli\_BusName>>

<<Coverage List:CONTR>>

<<Schedule Detail

List:Colors=#000000|#FFFFFF:ShowHeader=True:ShowPremium=True:ShowScheduled=True:ShowUnscheduled=True>>

<<Cli\_BusName>>

**OTHER COVERAGES TO CONSIDER INCLUDE BUT ARE NOT LIMITED TO THE FOLLOWING**

*For firm quotes on optional coverage please contact my agency.*

***This summary is intended as a brief review of coverage only. For terms and restrictions, refer to the individual policy and coverage forms.***

**PREMIUM SUMMARY:**

<<Premium Detail List:Colors=#FFFFFF|#FFFFFF>>

<<Policy Summary List>>