



Insurance Quoting How-to Guide

ABOUT VIU BY HUB

We are VIU by HUB

We're a trusted insurance brokerage that delivers over two decades of risk expertise to clients in the manner they choose – whether online through our digital insurance brokerage or via phone with our expert advisors. What that delivers for customers is choice, transparency, and the best selection of coverage for them and their families across their lifetimes.

Powered by HUB International



Number 1

privately held personal
insurance broker in
the United States



13,000 employees

across
North America



Over 475 offices

in the United States
and Canada

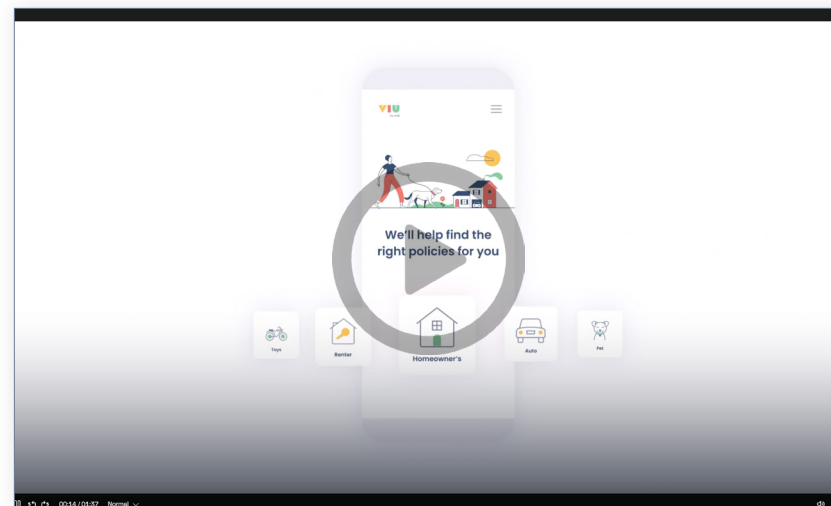


25 years

of serving
our customers

BENEFITS OF VIU BY HUB

VIU by HUB makes the insurance process simpler for your customers.



Check out how VIU by HUB makes getting insurance effortless for your customer. [Watch the Video](#)



Expansive brokerage expertise to secure the right coverage that protects what matters most



Lightning-fast quotes from 50+ top, A-rated national carriers



Expertise to move customers quickly through their closing process



Ongoing insurance advice as your customers' lives change



Tools like a digital wallet to easily manage all insurance policies



Lifetime policy renewal service, so they only need to enter their information once

Guiding their quote journey

VIU by HUB provides each customer the guidance they need to find their customized quote.

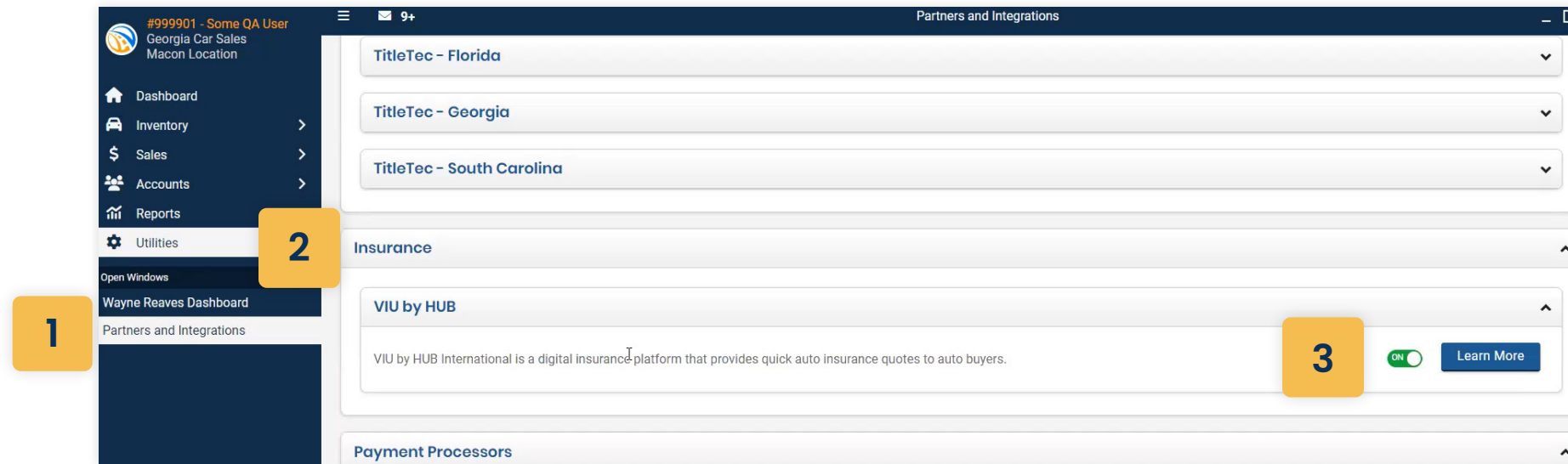
- > Activate quick quoting
- > Referring your customer



ACTIVATE QUICK QUOTING

Guiding their quote journey

Before referring your customers, visit the Partner and Integrations page to quickly activate and access the program resources. You'll only need to complete this step once.



1. Go to the “Partners and Integrations” page
2. Scroll down to Insurance > VIU by HUB
3. Click the toggle to “On” to activate the option to refer within the application.

TIP: Click the “learn more” button to find resources that will guide you and your customers quickly through all you need to know! Come back and visit to stay a partnership expert.

REFERRING YOUR CUSTOMER

Guiding their quote journey

It couldn't be easier to get your customer insured and driving home in their new auto. Follow these steps to make your referral.

Step One: Enter customer information within the application.

The screenshot shows the 'Buyer Details' section of a web application. At the top, there are navigation tabs: 'Customer' (with a red error icon), 'Inventory' (with a red error icon), 'Finance' (with a red error icon), 'Recap', 'Print' (with a yellow warning icon), and 'Finalize' (with a green checkmark icon). Below the tabs is a header with a user icon, 'Buyer' (with a red error icon), and a '+ Add a Person' button. The main form area is titled 'Buyer Details' and contains several sections: 1. 'Check if this is a business' checkbox. 2. 'Personal Information' fields: 'First Name', 'Middle Name', and 'Last Name' (all with red error icons); 'Suffix' dropdown; 'SSN' (with a yellow warning icon); 'Date of Birth' (with a yellow warning icon and a calendar icon); and 'Age' field. 3. 'Residence' section: 'Address' and 'Address Line 2' (both with red error icons); 'Zip*' (with a red error icon and a search icon); 'County' (with a red error icon and a search icon); 'City' (with a red error icon); 'State' (with a red error icon and a dropdown arrow); 'Residence Type' dropdown (set to 'OWN'); 'Rent/Payment Amount' field (set to '\$ 0.00'); 'Landlord/Mortgage Name' field; and 'Landlord/Mortgage Phone' field (with a phone icon). 4. 'Time at Address' section: 'Since' date field (with a calendar icon); 'Years' dropdown (set to '0'); and 'Months' dropdown (set to '0'). 5. 'Other Income' section: 'Other Income (Monthly)' field (set to '\$ 0.00') and 'Other Income Source' field. 6. 'Different mailing address?' checkbox. 7. 'Contact Info' section: 'Email' field; 'Cell Phone' field (with a phone icon); and 'Home Phone' field (with a phone icon).

Did you know? Your customer's information (name, address, email and phone) will prefill for them within their quote to save time and enhance their experience!

TIP: Customer **email OR phone** is required to successfully submit the information to quote.

REFERRING YOUR CUSTOMER

Guiding their quote journey

Step Two: Choose your preferred stage of the application to refer your customer and click “Quick Insurance Quote”

Option 1: Customer page within Insurance Info section

The screenshot shows a web form with the following sections:

- Customer:** Progress indicators for Customer, Inventory, Finance, Recap, Print, and Finalize.
- Buyer Options:** A sidebar menu with options like View Location, Get Directions, Credit Report, Copy To Prospect, Print Credit App, and Print Blank Credit App.
- Contact Info:** Fields for Email, Cell Phone, Home Phone, Work Phone, and Primary Phone. Includes checkboxes for 'Opt out of Texting' and 'Opt out of Emailing'.
- License Info:** Fields for License State, License Number, and Expires.
- Insurance Info:** Fields for Company Name, Policy #, and Expiration Date. A 'Quick Insurance Quote' button is located below this section.

Option 2: Finalize page

The screenshot shows the 'Finalize' page with the following elements:

- Buttons:** 'Save as Pending' (Come back to sale at later time.) and 'Book Sale' (More Information is required to book sale.)
- Partner Data Submission:** A grid of lender options:
 - ETR / Temp Tag: Electronic Title Filing Through TitleTec.
 - Temp Tag Only: Temp Tag Filing Through TitleTec.
 - MidAtlantic Finance: Request Financing From MidAtlantic Finance.
 - DealerTrack Lenders: Request Financing From DealerTrack Lenders.
 - Automatic Lenders: Request Financing From Automatic Lenders.
 - Credit Acceptance: Request Financing From Credit Acceptance.
 - CUDL Lenders: Request Financing From CUDL Lenders.
 - Quick Insurance Quote:** VIU by HUB (highlighted with a green border).
 - RouteOne Lenders: Request Financing From RouteOne Lenders.
 - F&I Express: Send to F&I Express.

Save and Continue?

⚠ Changes have been made that have not been saved. To continue, you must save first.

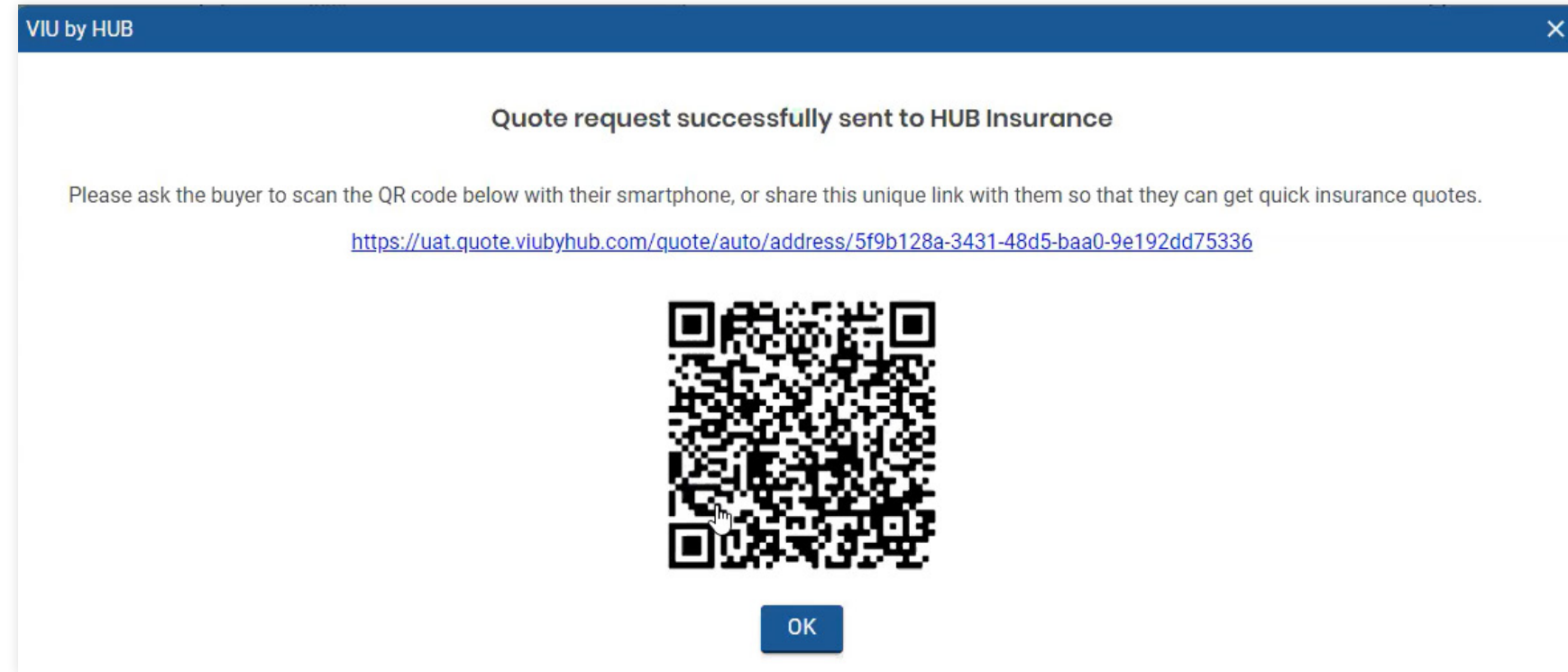
Click Save & Continue Cancel Save & Continue

TIP: Sending the referral from the Finalize page saves the customer a step by prefilling the VIN on the quoting page!

REFERRING YOUR CUSTOMER

Guiding their quote journey

Step Three: Share your screen with your customer so they can scan their unique QR code and quickly complete their quote



Did you know? Each QR code is unique to the customer information entered. They will see their name, address and more prefilled within the VIU by HUB quote based upon the application information entered

TIP: If your customer does not have a smartphone, the link can be copied to email to them or pasted into a browser.

HOURS: The VIU by HUB advisory team is standing by at 1-833-991-4453 to help your customers get the insurance they need, Monday through Friday from 8 am - 9 pm and Saturday 11 am - 3 pm ET.

If outside normal business hours, an experienced VIU agent will call the customer the next business day to complete the policy purchase.

Introduction to VIU by HUB

Guiding their journey

Partnership support

> Your VIU by HUB support team

YOUR VIU BY HUB SUPPORT TEAM

Who to contact

For any additional client requests, program questions or feedback contact our Strategic Partnerships team. We will respond within 24 business hours.

Email

strategicpartnerships@hubinternational.com

For help, please contact Wayne Reaves support staff at 478-474-8779 or support@waynereaves.com.

