



Simply Business Agent Portal

Managing client quotes and policies just got easier.

- * Effortlessly find, track and manage quotes.
- * Streamline the management of active policies.
- * Instantly access and download policy documents and update payment information.

More help and support is just a click away.

Agent Page

Track Quotes

Log in to the Simply Business® quote journey through your partner platform and click here to see your quotes.

Finish and Buy

Click to go back to where you left off, purchase online, and get policy docs

The screenshot shows the 'Simply Business' agent portal. On the left, there's a sidebar with 'Welcome, Agent' and navigation links: 'Start New Quote', 'Track Quotes' (highlighted with a red circle), and 'Track Policies'. Below these are contact details: 'Got questions? We've got answers (855) 914-3716' and 'See our opening hours'. On the right, a table titled 'Quotes in progress (#)' lists various quotes with columns for Quote number, Date created, Business name, LOB, Status, Expected Start Date, Quotes, and Premium. Each row has a 'View' button. The status column shows 'Open', 'Purchas...', 'Expired', and 'No quote'. A 'Logout' button is in the top right corner.

Quote number	Date created	Business name	LOB	Status	Expected Start Date	Quotes	Premium	
ABC123456789	01/01/2023	Margaret and Lottie...	GL	Open	01/01/2023	3	\$500.00	View
ABC123456789	01/01/2023	Sam's Test Business	IM	Open	01/01/2023	1	\$500.00	View
ABC123456789	01/01/2023	Deepika's Test Busi...	GL	Open	01/01/2023	2	\$500.00	View
ABC123456789	01/01/2023	Lottie Dottie Demos	GL	Purchas...	01/01/2023	3	\$500.00	View
ABC123456789	01/01/2023	Margaret and Lottie...	GL	Purchas...	01/01/2023	1	\$500.00	View
ABC123456789	01/01/2023	Margaret and Lottie...	IM	Purchas...	01/01/2023	2	\$500.00	View
ABC123456789	01/01/2023	Margaret and Lottie...	GL	Purchas...	01/01/2023	1	\$500.00	View
ABC123456789	01/01/2023	Margaret and Lottie...	GL, PL	Purchas...	01/01/2023	2	\$500.00	View
ABC123456789	01/01/2023	Margaret and Lottie...	GL	Expired	01/01/2023	1	\$500.00	View
ABC123456789	01/01/2023	Margaret and Lottie...	GL	Expired	01/01/2023	2	\$500.00	View
ABC123456789	01/01/2023	Margaret and Lottie...	GL	No quote	01/01/2023	1	\$500.00	View
ABC123456789	01/01/2023	Margaret and Lottie...	GL	No quote	01/01/2023	2	\$500.00	View
ABC123456789	01/01/2023	Margaret and Lottie...	GL	No quote	01/01/2023	1	\$500.00	View

Get Help

Use this page as a reference when speaking with our call center

Track Policies

See all Simply Business® bound policies in one place.