



LEARN MORE

Enrollment

guide

Cinch Home Warranty Enrollment – bolt access Portal

OR

Add New Customer

* First Name:

* Last Name:

* Email:

* State:

* Zipcode:

Reset

Continue

Click Continue after adding customer info

Cinch Enrollment Portal Introduction – Main Page

From the Cinch enrollment portal, you'll be able to enroll your customers into one of the Cinch plans and access resources materials.

Start an Enrollment:

Agent Enrollment Page
Bolt Insurance

*

*

*

Access Resource Materials:

To pull up a resource, click on the green hyperlink for each resource.

Agent Resources

[Sales Guide](#)
[Enrollment Guide](#)
[Coverage Comparison](#)
[FAQs](#)
[Objections and Rebuttals](#)
[Training Guide](#)

Customer-Facing Resources

[Complete Home Product Sheet](#)
[Water Essentials Product Sheet](#)

Enrollment Portal Introduction – Agent Resources

Agent Resources

Sales Guide
Enrollment Guide
Coverage Comparison
FAQs
Objections and Rebuttals
Training Guide

Customer-Facing Resources

Complete Home Product Sheet
Water Essentials Product Sheet

Resources are available to support you with everything from understanding Cinch's plan(s) all the way through the sales and enrollment process.

In addition, you'll have access to customer-facing product sheets which can also be used as a sales tool.

Agent Resources:

Sales Guide

The sales guide helps you remember what information needs to be disclosed or read to the customer throughout the sales and enrollment process

Enrollment Guide

Provides step-by-step instructions for the enrollment process

Coverage Comparison

Provides a comparison chart for what is covered with the Complete Home vs. Water Essentials plan.

FAQs

Provides additional information about the plan and will help you answer commonly asked questions

Objections & Rebuttals

Provides suggestions on how to overcome the most common rebuttals

Training Guide

Full training deck provides in depth product knowledge, steps for enrolling, and sales tips.

Customer-Facing Resources:

1-Page Product Sheets

Provides details about each Cinch plan and can be shared with your customers!

Enrollment Process – Getting Started

1. Your bolt access members producer code will pre-populate with your agent email and the customer's property zip code.

Agent Enrollment Page
Bolt Insurance

SAIS9 *

sais9@epos.com *

78731 *

Submit


Agent Resources
Sales Guide
Enrollment Guide
Coverage Comparison
FAQs
Objections and Rebuttals
Training Guide

Customer-Facing Resources
Complete Home Product Sheet
Water Essentials Product Sheet

2. Click Submit

Enrollment Process – Selecting a Plan

PLAN SELECTION

Select a product  *

Submit to continue

1. Use the drop-down box to select the plan

2. Click Submit to continue

Type in the following information:

- Customer’s First/Last Name
- Phone Number
- Email Address

Contact information:

First name *

Last name *

Phone number *

Email *

1. Type in the customer's property address.

Note: If the mailing or billing address is different than property address, check the appropriate box and type in the mailing or billing address.

The screenshot shows a web form for capturing property address. The main form has the following fields: "Property address:" label, "Address 1 *" text input, "Address 2" text input, "City *" text input, "State" dropdown menu, and two checkboxes at the bottom: "Customer mailing address is different from property address" and "Billing address is different from property address". A grey modal window is overlaid on the right side of the form, containing fields for "Address *" (text input), "Address 2" (text input), "City *" (text input), "State *" (dropdown menu showing "AL"), and "ZIP *" (text input). Two pink arrows originate from the checkboxes in the main form and point to the "Address *" field in the modal.

Enrollment Process – Billing Options & Offering PUP

1. Under billing options, select monthly or annual.

2. If a customer is enrolling in the Complete Home Plan, the Premier Upgrade Plan (PUP) must be offered to all customers whose property resides in the state of Florida. This is a compliance requirement!

*PUP can also be added to all plans in all other states.

The screenshot shows a web interface for plan enrollment. A pink rectangular box highlights the 'Billing options' section, which includes the 'Complete Home' plan and two radio button options: 'Monthly \$52.99 (plus applicable taxes)' (which is selected) and 'Annual \$635.88 (plus applicable taxes)'. Below this, the 'Premier Upgrade Package' section is visible, showing 'Additional coverage up to \$1,000 per claim.' followed by a blue link 'Read more...'. At the bottom of this section is an unchecked checkbox labeled 'Monthly \$12.50'. Two pink arrows point from the text at the bottom of the slide to these elements: one to the checkbox and one to the 'Read more...' link.

Billing options:

Complete Home

☒ Monthly \$52.99 (plus applicable taxes)

☐ Annual \$635.88 (plus applicable taxes)

Premier Upgrade Package:

Additional coverage up to \$1,000 per claim. [Read more...](#)

☐ Monthly \$12.50

To add PUP to the warranty plan, click in the check box.

Click **Read More** for a description of PUP.

Enrollment Process – Collecting the Payment Info.

1. Select a payment method.

2. Collect the credit/debit card or savings/checking account payment information.



(Pre-paid cards are not accepted)

Payment method

☒ Credit card

☐ Checking or savings account

Name on card *

Card number *

Card type *

Visa

Security code *

Expiration month *

Jan

Expiration year *

2021

☒ Checking or savings account

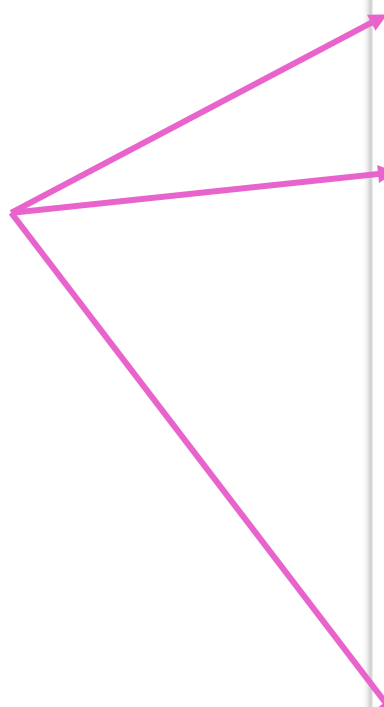
Account number *

Routing number *

Account type *

Checking

Read the disclosure information in each check box to the customer. If the customer consents to being enrolled, click in each box, then click **Next**.



☐ Claims: You have a 30-day waiting period to start coverage from date of enrollment. If you have a claim, the deductible amount is \$150 and is due when a claim is placed..

☐ (MONTHLY BILLING) Unless you call to cancel the [Complete Home/Water Essential] plan within the first 30 days from enrollment, the amount of [\$XX.XX – add \$12.50 for PUP if selected] plus applicable taxes will be automatically billed after the 60 days, which includes the first month free, to the selected payment method you provided today and every month after that. The Premier Upgrade package only at \$12.50 plus any applicable taxes will begin being billed 30 days from today. (ANNUAL BILLING) –Unless you call to cancel within the first 30 days from enrollment, the amount of [\$XXX.XX – add \$150 for Premier Upgrade package if selected] plus applicable taxes will be automatically billed after 30 days to the payment method you provided today and then on the anniversary of your agreement start date or the next business day thereafter.

☐ Automatic Renewal: Your warranty is a 12-month auto-renewal term. If you do not cancel prior to the expiration of the 12-month term, you will be automatically billed [\$XXX each month/ \$XXX annually] or then-current rates. You can cancel at any time by calling [Complete Home at 1-844-324-5688] or [Water Essentials at 844-627- 6010]. GET A CLEAR YES BEFORE PROCEEDING

Next

Enrollment Process – Order Summary Screen

1. Review the information on the Order Summary Screen with the customer, including any applicable taxes.

2. Click **Place My Order**, if everything is accurate

Order summary!

Review and complete your order

test test
123 test street
round rock, TX 78665

Complete Home Plan

Plan details

QTY	Details	Monthly Cost
1	Base coverage	\$52.99

Premier Upgrade Package

QTY	Details	Monthly Cost
1	Additional coverage up to \$1,000 per claim.	\$12.50

Payment method: Credit Card

Place My Order

Subtotal: \$65.49
Tax: \$0.00

Total: \$65.49
Total Plan Price: \$785.88
Plan Deductible: \$150

Enrollment Process – Confirmation & E-Sig. Documents

Once the confirmation screen appears, the electronic Letter of Authorization (LOA) has been emailed to the customer.

1. Make sure the customer received the LOA and e-signs it.
2. Tell the customer they will receive their welcome materials via mail within 10-15 days.
3. Provide the customer with Cinch's toll-free number.

Click **Start A New Order** to refresh the screen for the next enrollment.

E-SIGNATURE DOCUMENTS SENT

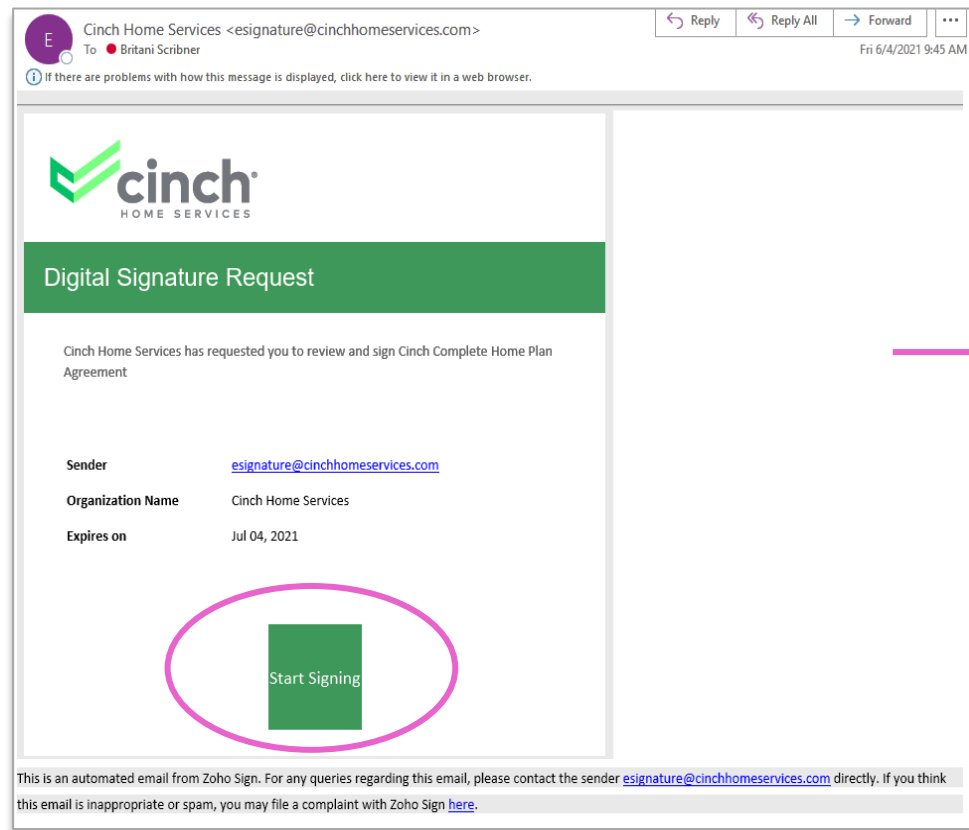
1. The customer will receive an email from Cinch which will prompt them to e-sign the letter of authorization to complete the purchase of the home warranty. If the customer does not e-sign the LOA, they will not be enrolled.
2. Once the e-signature is completed, the contract is created, and the customer will receive a confirmation email with a link to register their account online and review the terms and conditions.
3. Within 10-15 days from e-signing the authorization letter, the customer will receive a welcome kit in the mail which includes terms and conditions, coverage details, and limitations.
4. You can also provide your customer with Cinch's toll-free number to call if they have any questions or choose to cancel the coverage. (Complete Home 844-324-5688) or (Water Essentials 844-627-6010).

START A NEW ORDER

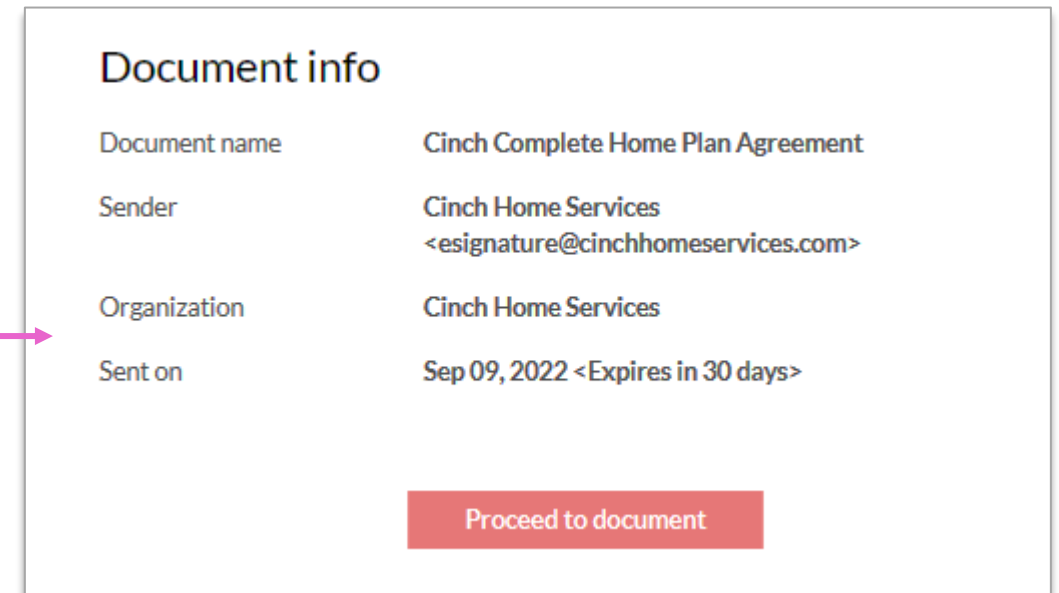
Note: Customers have 30 days to review and sign the agreement. After 30-days, the agreement is cancelled.

Signing the LOA

1. Customer receives an email from Cinch and will click **Start Signing** to begin the e-sign process.



2. On the next screen click, the customer will click **Proceed to document**.



Signing the LOA - Continued

The LOA will pull up for the customer to e-sign on their computer.

1. Check the box

☐ I confirm that I have read and understood the "Electronic Record and Signature Disclosure" and consent to use electronic records and signatures.

Agree & Continue

2. Click Agree and Continue

4. Click in the box where it says Enter Date and the current date will populate

3. Click in the signature box to type first and last name



Cinch Home Services, Inc. Disclosures and Purchase Verification

Below is a summary of the Cinch Home Services, Inc. ("Cinch") home warranty plan you elected to purchase from your agent: BOLT ACCESS

Cinch Complete Home Plan, summary for property address

123 test street, , round rock, TX, 78665

- Covers over 25 of your main home systems and appliances including your heating, cooling, electrical and plumbing systems and your major kitchen and laundry appliances; optional coverage may be purchased for things like swimming pools, spas and the Premier Upgrade Package that covers permits, code upgrades and more.¹
- Access to discounts on appliance purchases and a \$25 credit you can use towards A/C filters.
- Homeowners insurance deductible reimbursement up to \$1,000; one claim per twelve (12) month period.^{2,4}
- Emergency lodging reimbursement up to \$1,200; one claim per twelve (12) month period.^{3,4}
- Any repair/replacement should be covered by Cinch.⁵ Service fee is \$150
- This is an annual contract, you may cancel at any time,⁶ which will be billed monthly at \$65.49

There are a few exceptions and limits to your home warranty plan, and they are detailed in your service agreement. Once Cinch receives this enrollment request, your welcome materials and service agreement will be sent via mail to your property address. You may call Cinch's toll-free number 24/7 with any questions. Also, you may access your service agreement online any time at my.cinchhomeservices.com

I agree and understand that:

By signing this electronic verification, I authorize Cinch to charge my card, plus any applicable taxes, monthly. Billing will begin 60 days after this signed verification is received and processed by Cinch. My monthly billing date will be indicated in my service agreement. I've read, understand, and agree to all disclosures provided herein. I understand this billing authorization is in effect for twelve (12) months and is subject to automatic renewal. I may cancel my home warranty plan at any time by calling (844) 324-5688.

Customer name: test test

Monthly charge: \$65.49

Last 4 digits of payment method: 1111

☒ Yes, I agree to the above and provide my electronic signature below as confirmation:

* Enter Customer Full Name

* Enter Date

*** IMPORTANT PLEASE ACT NOW!** You must electronically sign this document to verify that you wish to purchase the home warranty plan detailed above.


Finish

You've successfully filled all fields. Click Finish to complete.

Signing the LOA – Saving/Emailing a Copy of the LOA

Customers can download a copy of the LOA, have it emailed to them or both.

You have signed this document.

Download 

Email to me 



Cinch Home Services, Inc. Disclosures and Purchase Verification

Below is a summary of the Cinch Home Services, Inc. ("Cinch") home warranty plan you elected to purchase from your agent: Partner's Name

Cinch Complete Home Plan summary for property address
604 Karolyn Dr., Boca Raton, FL, 33427

- Covers over 25 of your main home systems and appliances including your heating, cooling, electrical and plumbing systems and your major kitchen and laundry appliances; optional coverage may be purchased for things like swimming pools, spas and the Premier Upgrade Package that covers permits, code upgrades and more.¹
- Access to discounts on appliance purchases and a \$25 credit you can use towards A/C filters.
- Homeowners insurance deductible reimbursement up to \$1,000; one claim per twelve (12) month period.^{2,4}
- Emergency lodging reimbursement up to \$1,200; one claim per twelve (12) month period.^{3,4}
- Any repair/replacement should be covered by Cinch.⁵ Service fee is \$150
- This is an annual contract, you may cancel at any time,⁶ which will be billed monthly at \$51.99

There are a few exceptions and limits to your home warranty plan, and they are detailed in your service agreement. Once Cinch receives this enrollment request, your welcome materials and service agreement will be sent via mail to your property address. You may call Cinch's toll-free number 24/7 with any questions. Also, you may access your service agreement online any time at my.cinchhomeservices.com.

I agree and understand that:

By signing this electronic verification, I authorize Cinch to charge my card, plus any applicable taxes, monthly. Billing will be processed (30) days after this signed verification is received and processed by Cinch. My monthly billing date will be indicated in my service agreement. I've read, understand, and agree to all disclosures provided herein. I understand this billing authorization is in effect for twelve (12) months and is subject to automatic renewal. I may cancel my home warranty plan at any time by calling (844) 324-5688.

Customer name: Britani Scribner

Monthly charge: \$51.99

Last 4 digits of payment method: 1111

✓ Yes, I agree to the above and provide my electronic signature below as confirmation:

-britani scribner

Jun 04 2021

*** IMPORTANT PLEASE ACT NOW!** You must electronically sign this document to verify that you wish to purchase the home warranty plan detailed above.

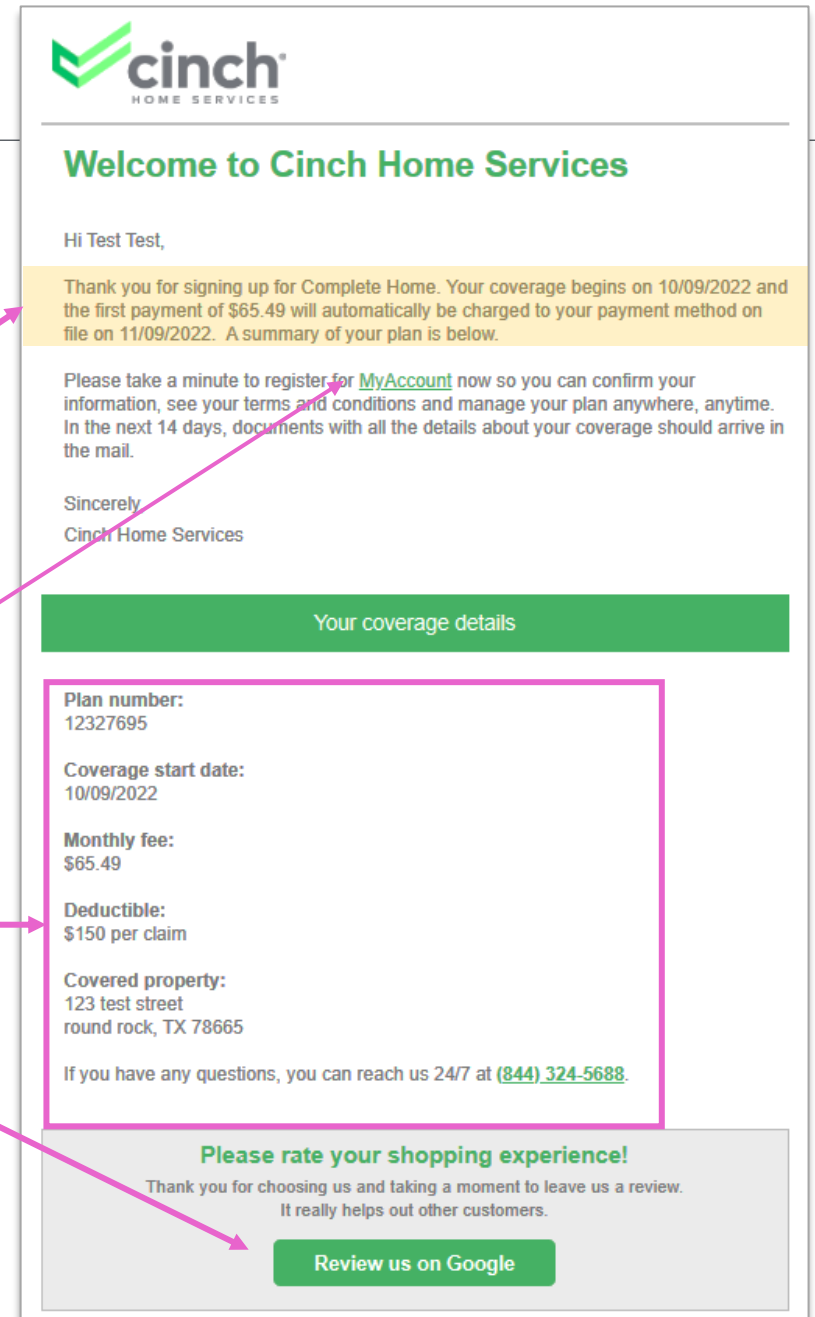
Sample of final signed LOA

Customer Confirmation Email

Once the LOA is signed, the customer is immediately enrolled and receive their welcome email within minutes.

The email includes includes their:

- Coverage Start Date
- Monthly Fee & Billing Start Date
- Registration Link to Set Up an Account
- Plan Number
- Deductible Amount
- Cinch's toll-free number
- A Google link to rate their shopping experience



bolt access & bolt Producers Confirmation Email

- Once the LOA is signed, a confirmation email will be sent to you the producer.
- bolt access will also receive a copy for tracking purposes.

