

Broker Portal Proposal Printing Tip Sheet

The Independent Health Broker Portal provides the capability to print a hardcopy of your proposal. The below steps outline the use of **View Printable** feature as well as a few pointers that will help you with printing proposals.

- From the Opportunity list locate the opportunity in question and click to open
 2. Within the Quotes section of the page layout (last section on the page) locate the desired quote and click to open

Opportunity Summary : View or edit Opportunity information.

This page allows you to view or edit an opportunity. A summary of the opportunity is located in the top section, and a list of the quotes within the opp

Edit Delete Copy

Account Name	Print my Proposal
Opportunity Name	Tips for Printing
Opportunity Owner ?	P Harringtonx [Change]
Effective Date (this must be set to the first day of the month) ?	11/1/2015
Type	New Plan Offering
Product Type	Medical
Quote Name	Print my Proposal
Quote ID	1837
Created By	P Harringtonx , 10/27/2015 10:17 AM

Edit Delete Copy

QUOTES New

Action	Quote Name	Quote ID	Primary
Edit Del More ▼	Print my Proposal	1837	<input checked="" type="checkbox"/>

2

3. You are now on the Proposal page. To print your Proposal click **VIEW PRINTABLE**

Proposal : Print my Proposal

PROPOSAL SUMMARY [Edit](#) [Delete](#) [Copy](#) [View Printable](#)

Proposal Name	Print my Proposal
Description	
Format	Portable Document Format (PDF)
Created By	P Harringtonx , 10/27/2015 11:01 AM

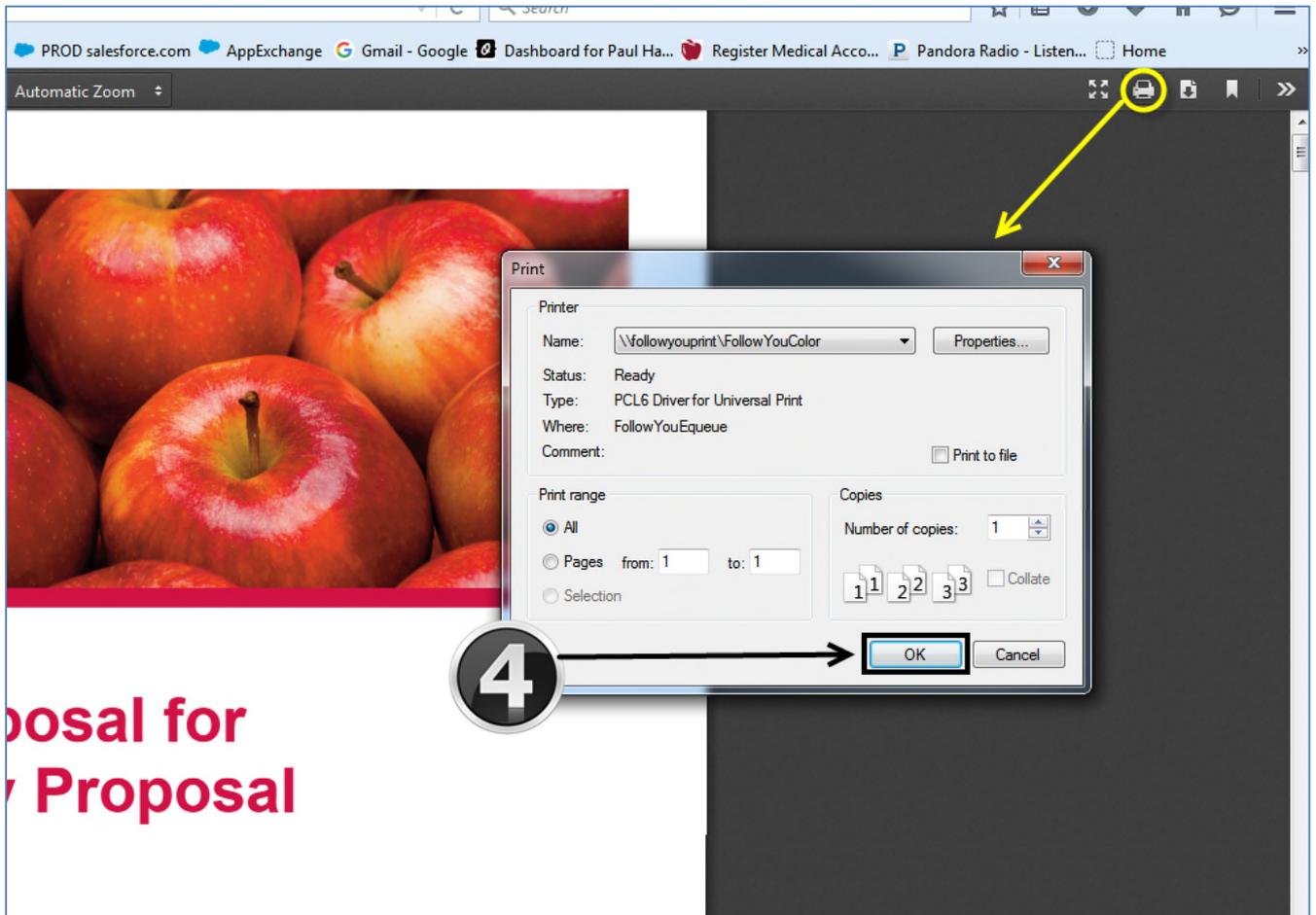
[Edit](#) [Delete](#) [Copy](#) [View Printable](#) 

PROPOSAL CONTENTS [Manage Contents](#)

Action	Selected Reports
View	Cover Page
View	Message from the President (CMO, etc.) - New
View	Small Group Standard Proposal
View	SG Tip Sheet
View	Multi Plan Rate Agreement
View	Benefit Summary

Mozilla Firefox:

4. Click the printer icon located on the far right of the page. Select desired printer and click **OK**
 - a. The full proposal will be printed



Mozilla Firefox Pop-up Blocker:

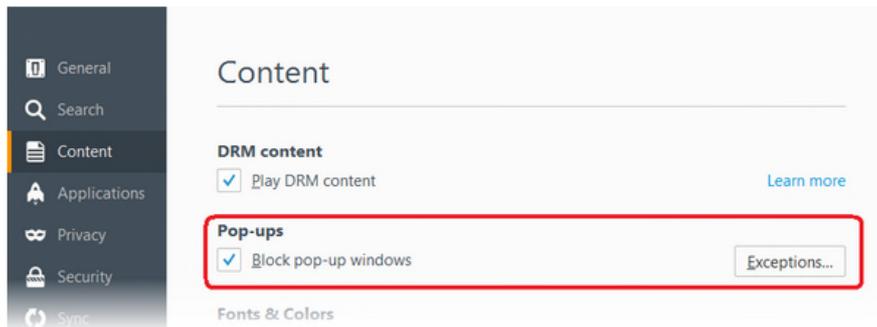
- Confirm that your Pop-up blocker is not preventing the proposal from opening as you select VIEW PRINTABLE
- To check your Pop-up blocker settings (the Menu is located to the far top right of the page)
 - o Click Menu to open



Pop-up blocker settings

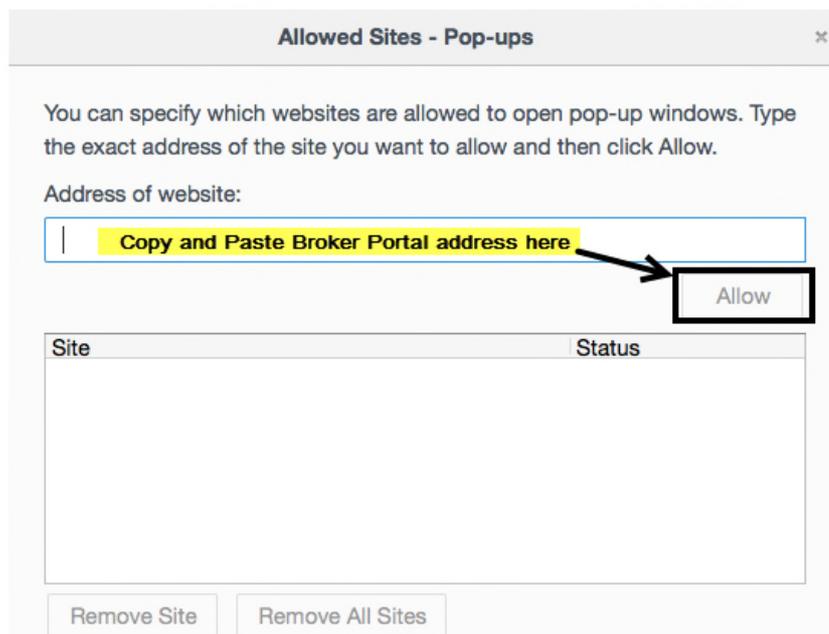
To access the pop-up blocker settings:

1. Click the menu button  and choose **Options**.
2. Select the **Content** panel.



In the content panel:

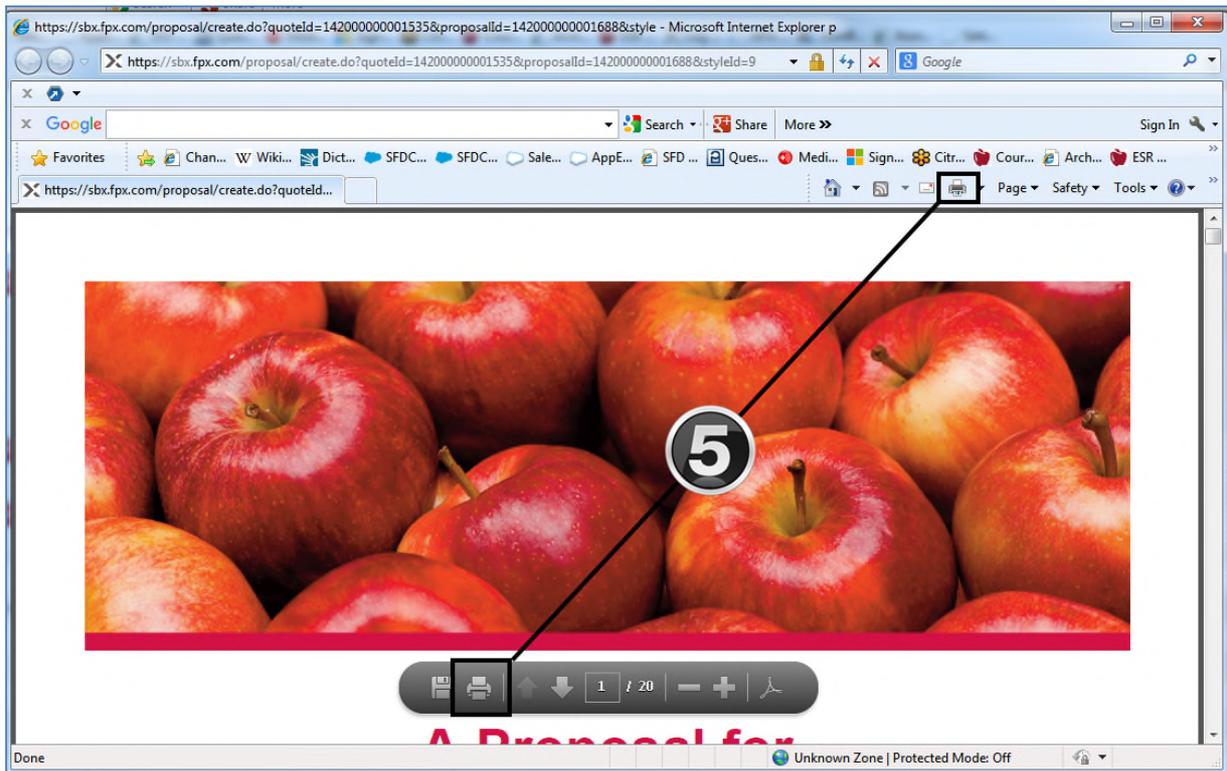
- **Block pop-up windows:** Uncheck this to disable the pop-up blocker altogether.
- **Exceptions**: This is a list of sites that you want to allow to display pop-ups.



Internet Explorer:

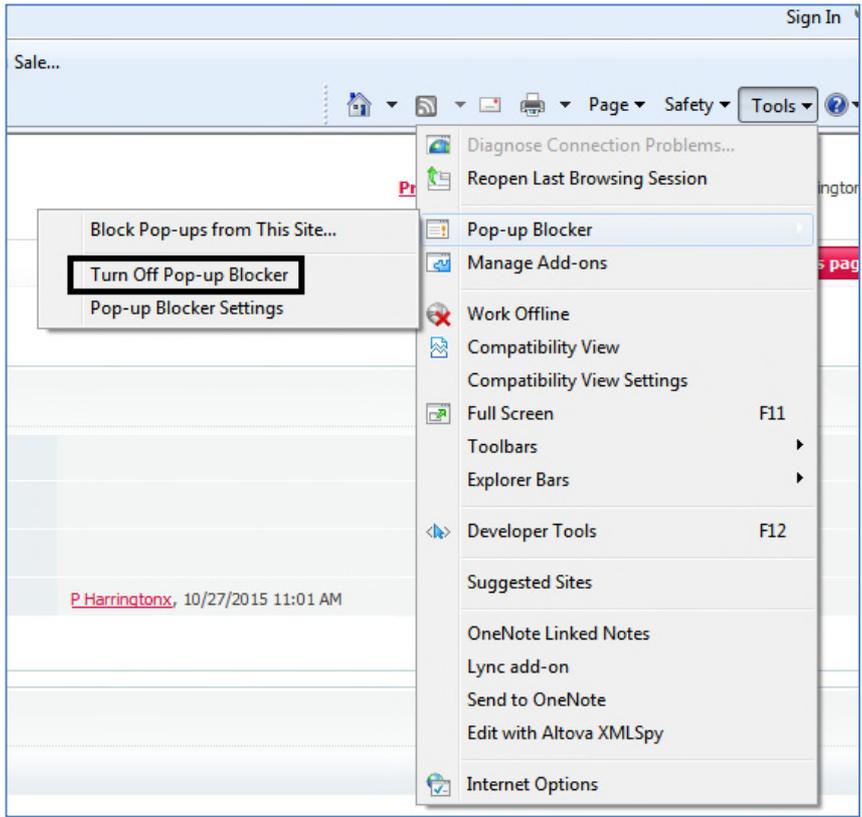
5. Click **VIEW PRINTABLE**

- a. As the proposal opens, click print icon located at the top of your page
- b. Or when hovering over the PDF file you will notice a gray bar that transition onto the page which provides the an additional option to print or save the proposal



Internet Explorer Pop-Up Blocker:

- Confirm that your Pop-up blocker is not preventing the proposal from opening as you select **VIEW PRINTABLE**
- Select **TOOLS** followed by Pop-up blocker and ensure that you click Turn Off Pop-up blocker



-End-