Quoting Quick Start Guide

How to start a quote on the Cowbell Platform

You can follow these step-by-step instructions to get started in the Cowbell dashboard.

1 Log into the **Cowbell Platform**.

2 Click the **Start a New Quote button** on the left-hand side of the dashboard.

3 Search for your client using the box and select your team.

4 Select your client from the list. If not found, select "Manually Add Client".

5 Select **Quote.**

6 Verify the **Account Information,** including turnover and industry code.

7 Answer **Security Assessment questions.**

8 Click **Request Quote.**

Once you create a new quote, it will become available under the quotes tab of your Workspace. You can view the quote status, bind the quote, and manage the quote directly from the dashboard. To download the quote proposal, specimen documents, and pre-filled application, click More in the action column and select the relevant Download option in the drop-down menu.

Uploading multiple accounts? You can use our bulk uploading capabilities. Contact us if you have any questions.

Additional questions? Contact uksupport@cowbellcyber.ai.

Frequently Asked Questions

Which browser works best for the Cowbell Platform?
Cowbell's platform runs best on Chrome or other Chrome-based browsers.

Where can I find my URL to log into Cowbell?
You will always log in using console.cowbellcyber.co.uk.

What information is required to quote an account?
You must include the company's name and business phone number, turnover, and Standard Industrial Classification (SIC) code. You can search SIC codes with keywords.

Why is the account that I just created marked as "Declined"?
The account could have been declined because the account turnover exceeds what Cowbell currently supports, the industry is not supported, or the account profile is incomplete.