

We have a mutual interest - **you.**

Bulletin 18-01

TO: All Mutual of Wausau Agents
FROM: Tricia Nest, Policy Administration
DATE: 2/14/2018
RE: Entering Quotes in BriteCore

Did you know that you can reuse your 'blank' Policy Numbers in BriteCore?

'Blank' policy numbers occur when quotes are abandoned. If Jane Smith comes into your office and you start a quote with her, but she leaves before you enter any of her information, your agency will have a 'blank' policy number from her quote.

This happens more than you may think. In the first month and a half of 2018, we are on policy Number MW-2018-1070. Of those 1,070 policies, 497 are 'blank' and abandoned. Reusing these numbers is helpful since 'blank' policies create system lags, and can also create an issue when we get to Policy Number MW-2018-9999 for the year. Numbers can be reused within your agency, either for Jane when she stops back or for Bob Jones when he calls to quote his property with you.

Finding 'blank' Policy Numbers within your agency is simple! Go to Policies, then narrow by "Policy Status" and "Unsubmitted Applications". Look for all policies that do not have a Named Insured or Policy Type listed. Click on that Policy Number, and begin entering your new quote information. For the sake of continuity, please only use Policy Numbers with the MW-2018 prefix.

The screenshot shows the BriteCore web application interface for the 'Policies List'. The browser address bar shows 'https://wausau.britecorepro.com/agent/policies/'. The page title is 'BRITECORE Mutual of Wausau Insurance'. The main navigation bar includes 'New Quote', 'Policies', 'Policies List', 'Legacy Search', 'Payments', and 'Reports'. A status bar indicates 'Impersonating' and 'Any action taken will be completed as'. Below this is a search section with 'Search for a Policy' and 'Advanced Search Tips'. The 'Narrow By' section has filters for 'Policy Status' (set to '2'), 'Revision States', and 'Policy Types'. A table of policies is displayed with columns: Policy Number, Named Insured, Policy Type, Status, Effective Date, and Last Visited. The table contains several rows of unsubmitted policies. Annotations are present: '1' is in the 'Policies' menu; '2' is in the 'Policy Status' dropdown; '3' is in the 'Named Insured' column of the first row; and '4' is in the 'Policy Number' column of the fourth row, with an arrow pointing to the cell.

Policy Number	Named Insured	Policy Type	Status	Effective Date	Last Visited
MW-2018-1053			Unsubmitted	02/12/2018	No Record
MW-2018-1052			Unsubmitted	02/12/2018	No Record
MW-2018-1051			Unsubmitted	02/12/2018	No Record
MW-2018-1050			Unsubmitted	02/12/2018	No Record
MW-2018-1049			Unsubmitted	02/12/2018	No Record
MW-2018-1048			Unsubmitted	02/12/2018	No Record
MW-2018-1047			Unsubmitted	02/12/2018	No Record

If you have any questions, please call Tricia Nest (855) 393-4609