

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

To: Mutual of Wausau Agents
From: Sue Gearin, Underwriter
Date: August 29, 2014
Re: Quoting System Frequently Asked Questions

Bulletin 14-03

It's been two weeks since we released our new quoting system and currently 252 quotes have been entered into the system. That is a phenomenal response and we really appreciate your business.

Below are a few updates and some general information based upon feedback:

1. Several Agents requested that the Social Security number not be mandatory when entering the named insured information in the quote screen. We turned off this requirement; please remember to go back to add the Social Security number when completing the application.
2. The e2value replacement estimate system is now available for use in our quoting system. Click on the icon in the Risks tab to access the system. The e2value does not populate any information in the quoting system. To revise an e2value that is already in the system for that insured, click on the e2value icon in the quote, click on the Smart Data Warehouse tab at the top right of the page and enter the last name and make sure the dates fall within the time you would have run the estimate. The E2value will appear below; click on the spy glass to open the e2value and make changes.
3. Please use the BriteQuote system when doing a new quote and not the IWS quoting system. When starting a new quote from the agent area of our website, please click on the BriteCore tab, not the Quoting tab. The Quoting tab opens the IWS quoting system which is still available until 9/19/14 to give you access to previously stored quotes. The IWS system will be turned off effective 9/19/14.
4. There are instruction videos on the home page of the BriteCore system for your usage. They are brief instructional videos that provide great general training and answers to many questions. If you need additional copies of the laminated quoting "cheat sheets", please contact your Underwriter. Also, contact your Underwriter if you would like to schedule a webinar or training session. We encourage your questions and feedback.
5. Remember to check the Submit Bound box on the Submit tab before submitting the application. We are checking to see if that box can be prefilled with the capability to uncheck the box for unbound applications.
6. If your agency is not set up for our agency sweep payment option, please contact Lynn Jensen at 855-393-4603. This option enables you to accept a check or cash from a client for the application down payment. The applicant will make the check payable to your agency instead of Mutual of Wausau and we will sweep the money from your trust account.

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We've had great feedback and questions; please keep them coming. We will continue to provide "frequently asked questions" bulletins to assist you as needed.

QUESTION: I started a quote, exited the system, and now I cannot pull it up when I go back into the system? Is the quote saved?

ANSWER: Saved quotes can be accessed by either entering the quote ID or the last name of the insured into the search area on the policy icon on the home page of the Brite Core system. Make sure you have the "unsubmitted" applications box checked before you search for the quote. (You can see all unsubmitted applications and quotes by leaving the search box blank and clicking go). When entering the insured information in the Insured tab of the quoting system, **make sure to click the Save button at the bottom of the page or go to the next page to save the contact information.** If you exit the system before saving the named insured or clicking next, you will not be able to access that quote again.

QUESTION: Where do I add credits and surcharges like the Senior Discount, Mortgage Free, and Seasonal Surcharge?

ANSWER: The Policy Wide Adjustment section will provide these options if available in that program. Click on the green "+" in that section to add the credit or surcharge. Also, some surcharges like the log-home surcharge or 60 amp surcharge can be found in the drop down box under the Dwelling green "+" to add optional coverages.

QUESTION: How do I correct information in the named insured box?

ANSWER: To change information in the named insured box, click the blue person or edit pencil. Don't try to change the name in the box. When done, click save, then back arrow and then refresh.

QUESTION: When do I use the Commercial Farm Liability option?

ANSWER: Use this Liability option when the named insured is a Corporation, LLC, Partnership, or if the farm is a rental farm. The rates are the same as the Personal Farm Liability, however the policy liability forms are different.

QUESTION: Billing Screen: How does it work?

ANSWER:

1. Select Billing Schedule from Drop Down Box.
2. Billing Method – Both the Initial Invoice (down payment) and Future Invoices sections must be completed.
3. Initial Invoice: Select "Bill Whom" from the drop down box. The "Bill How" address will auto fill from prior information you have entered in the system.
4. You may bill the insured by authorizing a one-time credit card payment or one-time ACH withdrawal from their checking account (ACH signature must be obtained on application for insurance), the insured can write a check to the agency for the first installment and you perform an agency sweep, or the policy can be annual escrow billed by selecting Annual Escrow Bill option in Billing Schedule.
5. Complete Future Invoices section for all future installments and endorsements using methods indicated above.
6. Press Save or Next at bottom of screen.
7. **An initial payment must be made electronically. We are no longer accepting a check or cash in our office for the initial installment on new business applications.**