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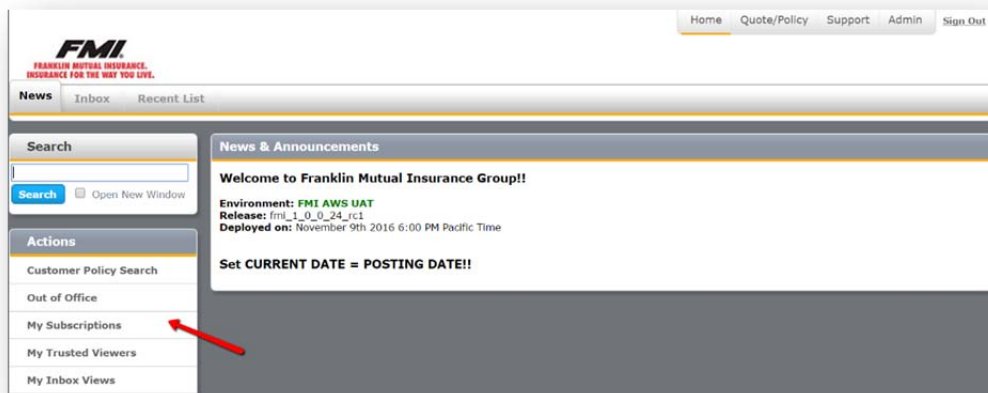
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## 1. Subscriptions

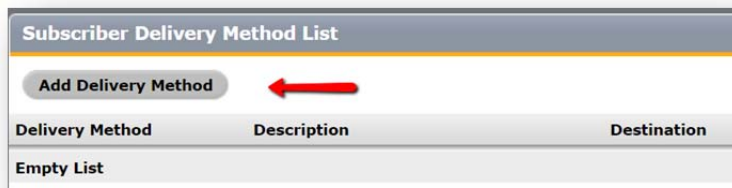
This function allows the user to Add/Edit/Remove email addresses so that the user can receive notification of tasks or follow ups.

### A. Add/Edit/Remove Email Addresses

While on the home screen, you will click on **My Subscription** in the **Actions** menu.



Click on **Add Delivery Method** to enter email address.



Click **Select**.

Add desired email address and click **Add**.

The screenshot shows the 'Subscriber Delivery Method' form. The 'Email\*' field is highlighted with a red box. The form includes fields for 'Delivery Method\*', 'Description\*', and 'Email\*'. The 'Email\*' field is currently empty. The 'Add' and 'Cancel' buttons are at the bottom.

This process can be repeated for additional email addresses.

Subscriber Delivery Method List will show email address under Destination. On this screen you will also have the options to Edit/Delete.

| Subscriber Delivery Method List     |             |                                                              |
|-------------------------------------|-------------|--------------------------------------------------------------|
| <a href="#">Add Delivery Method</a> |             |                                                              |
| Delivery Method                     | Description | Destination                                                  |
| Email                               | Email       | agent@agency.com <a href="#">Edit</a> <a href="#">Delete</a> |

Subscription List is where you subscribe to the desired description.

*Please be advised that Commission Statements may not be available to all users.*

| Subscription List        |                                             |             |                         |                         |                           |                                             |
|--------------------------|---------------------------------------------|-------------|-------------------------|-------------------------|---------------------------|---------------------------------------------|
|                          |                                             |             |                         |                         |                           | <input type="checkbox"/> Digest if Possible |
| Select                   | Description                                 | Schedule    | Primary Delivery Method | Primary Delivery Format | Secondary Delivery Method | Secondary Delivery Format                   |
| <input type="checkbox"/> | Tasks Assigned to Me                        | Select... ▼ | Select... ▼             | Select... ▼             | Select... ▼               | Select... ▼                                 |
| <input type="checkbox"/> | Tasks Assigned to Group 001000              | Select... ▼ | Select... ▼             | Select... ▼             | Select... ▼               | Select... ▼                                 |
| <input type="checkbox"/> | Urgent Tasks Assigned to Me                 | Select... ▼ | Select... ▼             | Select... ▼             | Select... ▼               | Select... ▼                                 |
| <input type="checkbox"/> | Urgent Tasks Assigned to Group 001000       | Select... ▼ | Select... ▼             | Select... ▼             | Select... ▼               | Select... ▼                                 |
| <input type="checkbox"/> | Commission Statement Attached to Producer   | Select... ▼ | Select... ▼             | Select... ▼             | Select... ▼               | Select... ▼                                 |
| <input type="checkbox"/> | Loss Payment Made on a Claim to the Insured | Select... ▼ | Select... ▼             | Select... ▼             | Select... ▼               | Select... ▼                                 |

- Under Schedule select either Immediate or daily (This is the frequency in which you will receive subscription emails).
- Under Primary Delivery Method you will be able to pick which email address you would like the subscription emails to go to (if you inputted more than one email they will all display and you must select the desired one).
- Under Primary Delivery Format you will be able to pick your desired format.
- Clicking the Digest if Possible checkbox allows the user to indicate that they want the notifications consolidated into a daily notice.

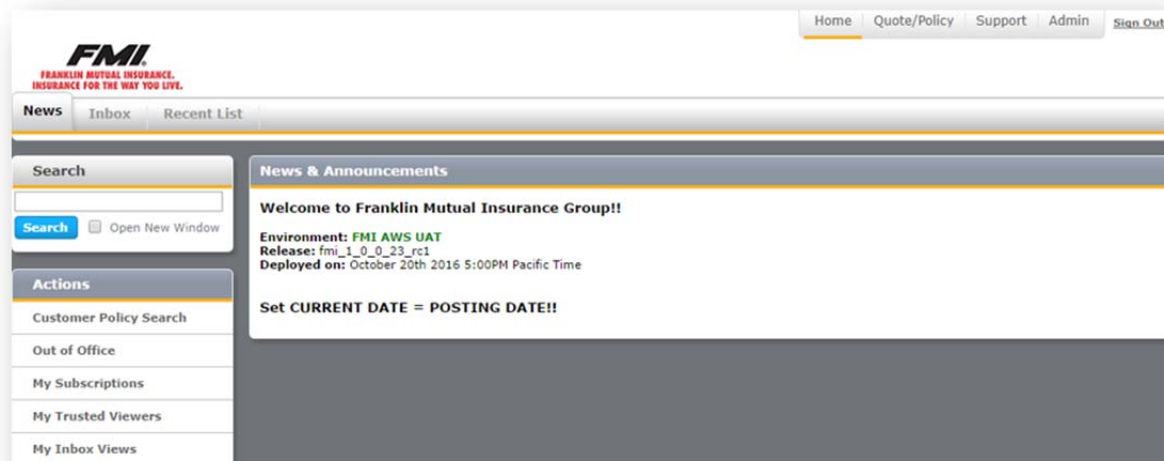
Under the Actions Menu hit **Save**.

| Actions     |
|-------------|
| <b>Save</b> |

## 2. Quote

### A. Quote-New Customer:

Select CUSTOMER POLICY SEARCH from the Actions Menu (Customer Search in the Quote/Policy tab can also be used)



Home Quote/Policy Support Admin Sign Out

News Inbox Recent List

Search

Search Open New Window

Actions

- Customer Policy Search
- Out of Office
- My Subscriptions
- My Trusted Viewers
- My Inbox Views

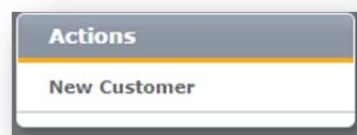
News & Announcements

Welcome to Franklin Mutual Insurance Group!!

Environment: FMI AWS UAT  
Release: fmi\_1\_0\_0\_23\_rc1  
Deployed on: October 20th 2016 5:00PM Pacific Time

Set CURRENT DATE = POSTING DATE!!

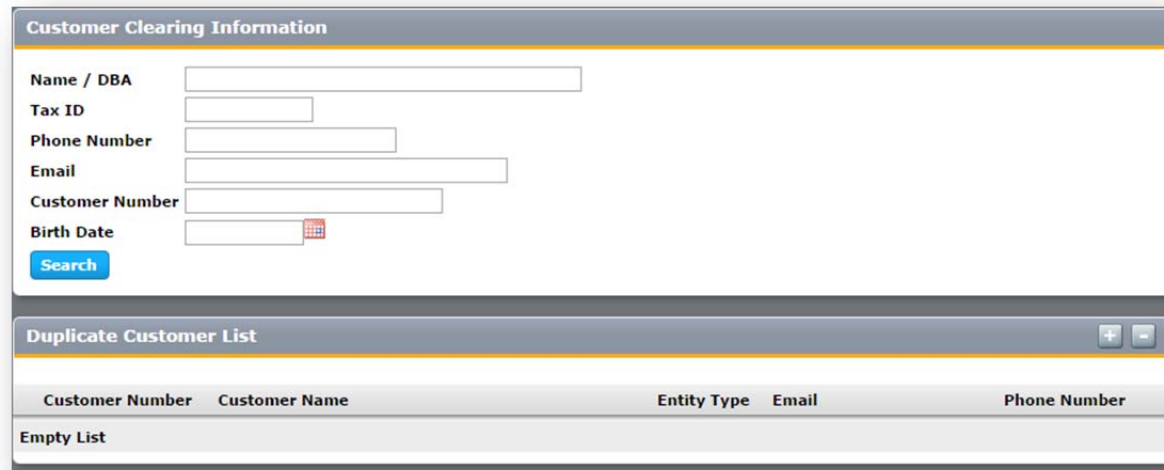
Click **New Customer** from the Actions menu.



Actions

New Customer

Complete the Customer Clearing Information tile and click **Search**.



Customer Clearing Information

Name / DBA

Tax ID

Phone Number

Email

Customer Number

Birth Date

Search

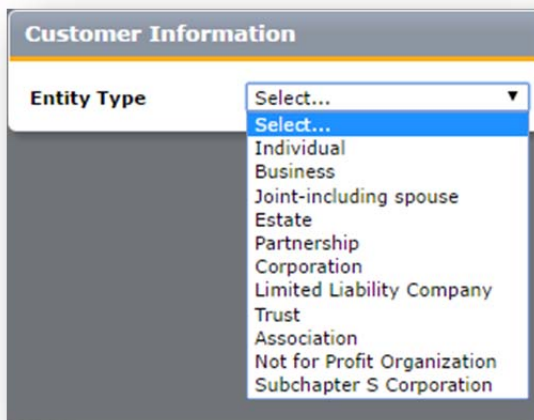
Duplicate Customer List

| Customer Number | Customer Name | Entity Type | Email | Phone Number |
|-----------------|---------------|-------------|-------|--------------|
| Empty List      |               |             |       |              |

The results of the Customer Clearing search will trigger the following (dependent on the presence of Duplicate customers or no Duplicate customers being found in the system):

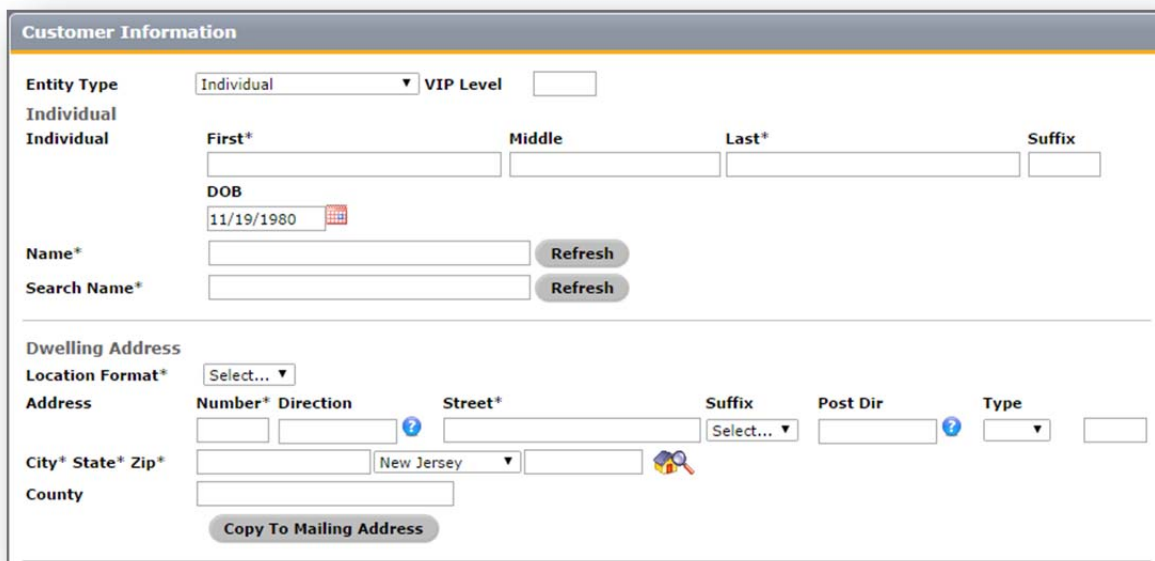
- If there is a duplicate customer in the system, the customer information will be displayed in the Duplicate Customer list. If the duplicate customer is the same customer you would add the quote to the existing customer. If the duplicate customer is not the same customer select **Continue** from the Actions Menu to enter the New Customer information into the system.
- If there is no duplicate customer in the system, the Customer Information screen will automatically be displayed to enter the New Customer into the system.

In the Customer Information screen, select the Entity type from the drop down list.



The screenshot shows the 'Customer Information' window. The 'Entity Type' dropdown menu is open, displaying a list of options: Select..., Select..., Individual, Business, Joint-including spouse, Estate, Partnership, Corporation, Limited Liability Company, Trust, Association, Not for Profit Organization, and Subchapter S Corporation. The 'Individual' option is highlighted.

Enter all required Customer Information (marked by an asterisks\*), as well as any additional information available.



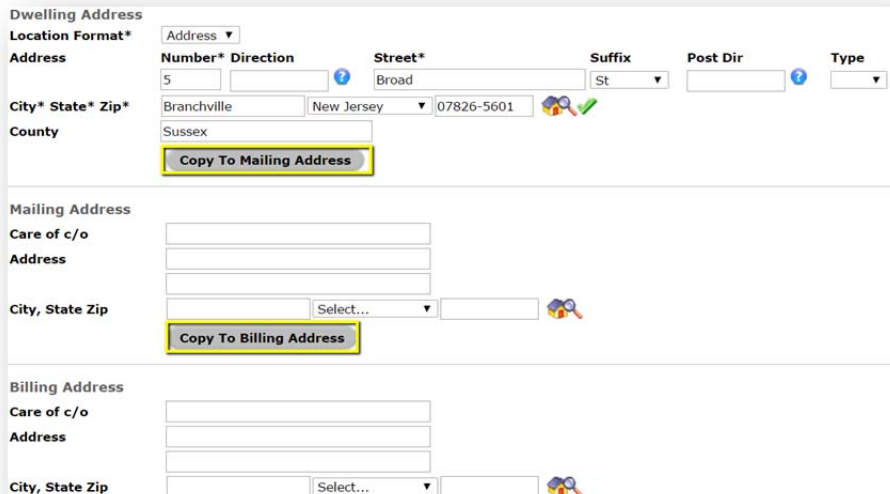
The screenshot shows the 'Customer Information' window with the following fields and options:

- Entity Type:** Individual (selected) | **VIP Level:** [ ]
- Individual Information:**
  - First\*:** [ ] | **Middle:** [ ] | **Last\*:** [ ] | **Suffix:** [ ]
  - DOB:** 11/19/1980 [Calendar icon]
  - Name\*:** [ ] [Refresh]
  - Search Name\*:** [ ] [Refresh]
- Dwelling Address:**
  - Location Format\*:** Select... [v]
  - Address:**
    - Number\*:** [ ] | **Direction:** [ ? ] | **Street\*:** [ ] | **Suffix:** Select... [v] | **Post Dir:** [ ? ] | **Type:** [v] | [ ]
    - City\* State\* Zip\*:** [ ] New Jersey [v] [ ? ]
    - County:** [ ]
  - Copy To Mailing Address:** [Button]

Verify the address by clicking the **Address Search** Icon.



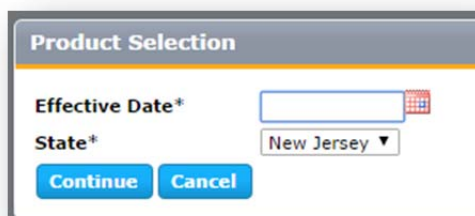
If the addresses are the same, **click** the copy to Mailing Address and/or Copy to Billing Address. Otherwise, enter the mailing and billing addresses.



The screenshot shows a form with three sections: Dwelling Address, Mailing Address, and Billing Address. Each section has fields for Care of c/o, Address, City, State, and Zip. In the Dwelling Address section, the 'Copy To Mailing Address' button is highlighted with a yellow box. In the Mailing Address section, the 'Copy To Billing Address' button is highlighted with a yellow box. The Dwelling Address section also includes a 'Location Format\*' dropdown, an 'Address' dropdown, and a 'Number\*' field with a 'Direction' dropdown. The 'Street\*' field is populated with 'Broad', and the 'Suffix' dropdown is set to 'St'. The 'Post Dir' field is empty, and the 'Type' dropdown is set to 'St'. The 'City\*' field is 'Branchville', the 'State\*' dropdown is 'New Jersey', and the 'Zip\*' field is '07826-5601'. The 'County' field is 'Sussex'.

Click **Save and Quote**.

After clicking **Save and Quote**, the Product Selection screen is displayed.



The screenshot shows the 'Product Selection' screen. It has a title bar 'Product Selection' and two buttons: 'Continue' and 'Cancel'. Below the buttons, there are two fields: 'Effective Date\*' and 'State\*'. The 'Effective Date\*' field has a calendar icon to its right. The 'State\*' dropdown is set to 'New Jersey'.

Enter the Effective Date quote/policy (State is pre-populated). Effective date can be entered manually, or can be selected using the Calendar tool.

Click **Continue**.

After clicking **Continue**, the Quote tabs are available, and the Policy chevron and screen is displayed.

The screenshot displays the Franklin Mutual Insurance Company Partner Platform ART User Guide for AGENTS. The interface includes a top navigation bar with links for Home, Quote/Policy, Support, Admin, and Sign Out. Below this, a secondary navigation bar shows tabs for Quote, Tasks, and Policy File. The main content area is divided into two sections: Policy General and Insured Information.

**Policy General**

- Product\*: New Jersey - Combination Dwelling - FMI Insurance Company
- Policy Form\*: MDW3 - Dwelling
- Occupancy\*: Tenant Occupied
- Effective Date\*: 10/31/2016
- Expiration Date\*: 10/31/2017
- Producer Code\*: 001000 (Ganfuss Agency)
- Prior Carrier\*: Chubb
- Policy Source\*: New Business Application

**Insurance Score**

Doe, John

**Insured Information**

- Entity Type\*: Individual
- Individual: First\* John, Middle, Last\* Doe, Suffix
- Name\*: John Doe (Refresh button: This is how the name will print on the Declaration Page)
- DOB: 01/02/1990
- Primary Phone: Select...
- Email:
- Dwelling Address: Address, Location Format\*, Location Address, Number\*, Direction, Street\*, Suffix, Post Dir, Type
- City\* State\* Zip\*: Branchville New Jersey 07826-5601
- County: Sussex
- Last Inspection Received Date:

**Quote Summary**

- Quote Number: QT-00000090
- Insured: John Doe
- Effective: 10/31/2016
- Product: Combination Dwelling
- Sub Type: MDW3
- Premium: \$945.00
- Status: In Process

In the Policy screen, enter all required information (marked by an asterisks\*).

*Note: The primary producer code will default. If using a different code click the magnifying glass and pick the agent code wanted.*

The Insured Information tile should automatically display the Customer Information.

Click **Save &Next Page**.

The image shows two buttons: "Save & Next Page" and "Save".

You are now in **the Combination Dwelling** chevron.

The screenshot shows the Policy chevrons. The chevrons are: Quote, Tasks, Policy File, Policy, Combination Dwelling (selected), Loss History, Review & Print, Forms, and Price Compare.

Enter all required information (marked by an asterisks\*).

| Dwelling General      |                                        |                                             |                                        |
|-----------------------|----------------------------------------|---------------------------------------------|----------------------------------------|
| General Information   |                                        |                                             |                                        |
| Year of Construction* | <input type="text"/>                   | Square Feet                                 | <input type="text"/>                   |
| Units*                | <input type="text" value="Select..."/> | Seasonal Use*                               | <input type="text" value="Select..."/> |
| Protection Class*     | <input type="text" value="Select..."/> | Distance to Hydrant/Accredited Water Source |                                        |
|                       |                                        | Construction Type*                          | <input type="text" value="Select..."/> |
|                       |                                        | Distance To Coast                           | <input type="text" value="Select..."/> |

If the MSB RCT **does not** pre-populate, go back to the 'Dwelling General' section and enter Square Feet. **Hit** the Order MSB RCT button.

| MSB RCT Express                              |                                |                       |                        |
|----------------------------------------------|--------------------------------|-----------------------|------------------------|
| MSB RCT Estimated Replacement Cost           | <input type="text" value="0"/> | MSB RCT Policy Number | UAT FMI S22 QT00000090 |
| <input type="button" value="Order MSB RCT"/> |                                |                       |                        |

Once the **Order MSB RCT** button is hit the value will populate

| MSB RCT Express                    |                                        |                       |                        |
|------------------------------------|----------------------------------------|-----------------------|------------------------|
| MSB RCT Estimated Replacement Cost | <input type="text" value="\$316,333"/> | MSB RCT Policy Number | UAT FMI S22 QT00000266 |

## Dwelling Detail

Enter desired coverages (*note: Coverage A cannot be less than the MSB RCT value*).

**Dwelling Detail**

Section I - Property Coverage

| Coverage               | Included Limit | Increased Amount | Total Limit | Deductible (All Other Perils)* | Deductible (Hurricane)* |
|------------------------|----------------|------------------|-------------|--------------------------------|-------------------------|
| A - Dwelling*          |                |                  | \$0         | \$500 ▼                        | N/A                     |
| B - Related Structures | \$0            | \$0              | \$0         |                                |                         |
| C - Personal Property  |                |                  | \$0         |                                |                         |
| D - Loss of Use        | \$0            | \$0              | \$0         |                                |                         |

Section II - Liability Coverage

Included ▼

Liability Type

Premises ▼

E - Personal Liability

\$300,000 ▼

MPL55 Personal Injury\*

No ▼

F - Medical Payments to Others

\$3,000 ▼

Additional Coverages

FM153 Fungi/Mold Limited, or Bacteria\*

\$10,000 Per Loss ▼

FM152 Sump Pump Failure\*

None ▼

Additional Options

FMI21 Special Coverage Enh.

Yes ▼

MPL48 Building Code or Law

Yes ▼

MPL49 Cov C Replacement Cost

No ▼

MPL18 Cov C Extended Causes of Loss Open Perils

No ▼

FM157 Equipment Breakdown

Yes ▼

Townhouse/Row House

No ▼

MPL89 Earthquake

No ▼

MDW25 Vacancy and Unoccupied

Yes ▼

MDW28 Vacant Dwelling

No ▼

MPL70 Protective Devices

Fire Alarm\*

None ▼

Burglar Alarm\*

None ▼

Smoke Alarm\*

Yes ▼

Sprinkler System\*

No ▼

## Protective Devices

If entering Central Station Fire or Burglar, certificates can be attached. See page 48 about attaching documents when you are ready.

MPL70 Protective Devices

Fire Alarm\*

None ▼

Burglar Alarm\*

None ▼

Smoke Alarm\*

Yes ▼

Sprinkler System\*

No ▼

## Coverage List

Coverage list shows all coverages both in force and available. You can view limits, deductibles and term premiums.

Coverage List

Show

Both

| Status    | Coverage Description                                                        | Limit 1 | Limit 2 | Deductible | Term Premium        |
|-----------|-----------------------------------------------------------------------------|---------|---------|------------|---------------------|
| Available | MPL 26 Additional Insured Premises Liability                                |         |         |            | <a href="#">Add</a> |
| Available | MPL 30 Farmers Special Liability                                            |         |         |            | <a href="#">Add</a> |
| Available | MPL 33 Farm Type Structures                                                 |         |         |            | <a href="#">Add</a> |
| Available | FM 227 Fuel Oil Limitations - Liability                                     |         |         |            | <a href="#">Add</a> |
| Available | MPL 38 Home Business                                                        |         |         |            | <a href="#">Add</a> |
| Available | MPL 52 Incidental Business Coverage                                         |         |         |            | <a href="#">Add</a> |
| Available | MPL 44 Increased Special Limits                                             |         |         |            | <a href="#">Add</a> |
| Available | MPL 16 Miscellaneous Property                                               |         |         |            | <a href="#">Add</a> |
| Available | MPL 19 Outboard Motors and Motorboats                                       |         |         |            | <a href="#">Add</a> |
| Available | MPL 32 Related Structures                                                   |         |         |            | <a href="#">Add</a> |
| Available | MPL 15 Scheduled Property                                                   |         |         |            | <a href="#">Add</a> |
| Available | MPL 65 Special Conditions                                                   |         |         |            | <a href="#">Add</a> |
| Available | MPL 17 Valuable Articles - Furs, Jewelry, Silverware                        |         |         |            | <a href="#">Add</a> |
| Available | MPL 20 Watercraft Liability                                                 |         |         |            | <a href="#">Add</a> |
| Available | MPL 78 Workers' Compensation and Employers' Liability - Residence Employees |         |         |            | <a href="#">Add</a> |
| Total:    |                                                                             |         |         |            | \$0.00              |

Save & Next Page

Save

Create Application

Click **Save &Next Page**.

After clicking **Save and Next** Page the Loss History screen is displayed.

| Loss History List                                                                             |           |             |            |              |              |        |
|-----------------------------------------------------------------------------------------------|-----------|-------------|------------|--------------|--------------|--------|
| Number                                                                                        | Loss Date | Loss Amount | Loss Cause | Claim Number | Claim Status | Source |
| Empty List                                                                                    |           |             |            |              |              |        |
| <a href="#">Next Page</a> <a href="#">Add Loss History</a> <a href="#">Create Application</a> |           |             |            |              |              |        |

If there are no losses to list, click **Next page**. If there are losses click **Add Loss History** from either the Action Menu or the Blue Add Loss History Button.

Home | Quote/Policy | Support | Admin | [Sign Out](#)

[Return to Customer Information](#) [Save & Next Page](#)

Quote | Tasks | Policy File | **Loss History** | Review & Print | Forms | Price Compare

Search

[Search](#) ☐ Open New Window

Actions

- Save
- Add Loss History
- Create Application
- Close
- Delete Quote
- Copy Quote
- Request Review
- View Producer

Loss History List

| Number     | Loss Date | Loss Amount | Loss Cause | Claim Number | Claim Status | Source |
|------------|-----------|-------------|------------|--------------|--------------|--------|
| Empty List |           |             |            |              |              |        |

[Next Page](#) [Add Loss History](#) [Create Application](#)

If you are adding a loss: enter all required information (marked by an asterisks\*), as well as any additional information available.

Loss History Detail

Number 1 Source Application ☐ Ignore

Loss Date\*  Cause of Loss\*  Loss Amount

Catastrophe Number  Claim Number  Claim Status

Carrier Name  Policy Type  Policy Number

Paid Amount  Property

Comments

Loss Description

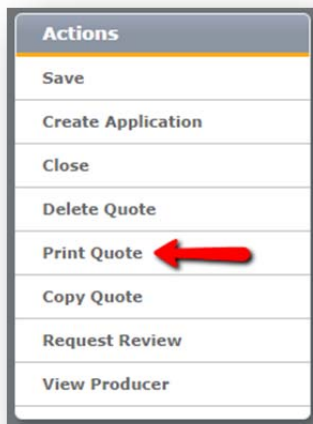
Loss Location

[Save](#)

Once all information is entered click **Save**.

Review & Print - This chevron shows a breakdown of the policy premium and allows the user to print quotes.

**\*\*Go to the Action tile on the left and click on Print Quote. This will bring up the quote and puts the quote in file. However, if you need a printed copy you **MUST** print to your local printer.**



A separate window will open that will generate a PDF of the quote for you to print.

Rate Confirmation shows a breakdown of coverages and premiums.

| Rate Confirmation                         |                        |          |
|-------------------------------------------|------------------------|----------|
| <a href="#">Risk 1 - Primary Dwelling</a> | <a href="#">Change</a> |          |
| A - Dwelling                              | 250000                 | 740.00   |
| B - Other Structures                      | 25000                  | 0.00     |
| D - Loss of Use                           | 50000                  | 0.00     |
| E - Personal Liability                    | 300000                 | 77.00    |
| F - Medical Payments to Others            | 3000                   | 35.00    |
| Deductible                                | \$500                  |          |
| FM 153 Fungi/Mold Limited                 | 10000                  | 20.00    |
| FMI 21 Special Coverage Enhancement       |                        | 35.00    |
| MDW 25 Vacancy and Unoccupancy            |                        | 15.00    |
| FM 157 Equipment Breakdown                |                        | 15.00    |
| <hr/>                                     |                        |          |
| Basic Policy Premium                      |                        | \$852.00 |
| Additional Premium & Credits              |                        | \$85.00  |
| Fee - New Jersey Guaranty Fund Surcharge  |                        | \$8.00   |
| Total Policy Premium                      |                        | \$945.00 |

## Payment Plan

This section outlines payment options and breaks down every payment option. Once you have selected the radio button you would like, click **Save & Next**. *\*\*Note: Opting to bill to the Mortgagee will prompt you to enter the Additional Interest (see section on Adding Additional Interest).*

Payment Plan shows all payment options. To select the payment option you desire click the **radio button** next to the desired option. *(This information can be added at quote, or you may opt to wait until a quote is selected by the insured and the application is being prepared).*

| Payment Plan                                            |                    |                        |                        |                 |                 |            |
|---------------------------------------------------------|--------------------|------------------------|------------------------|-----------------|-----------------|------------|
| Payment Options                                         | Down / 1st Payment | Number of Installments | Amount per Installment | Svc Chg per Pmt | Total # of Pmts | Total Paid |
| Pay Plans                                               |                    |                        |                        |                 |                 |            |
| Mortgagee Direct Bill Pay In Full <input type="radio"/> | \$1,161.00         | -                      | -                      | -               | 1               | \$1,161.00 |
| New Statement Accounts                                  |                    |                        |                        |                 |                 |            |
| Monthly Automated <input type="radio"/>                 | \$256.47           | 10                     | ~ \$90.45              | \$0.00          | 11              | \$1,161.00 |
| Bi-Monthly Automated <input type="radio"/>              | \$238.60           | 5                      | \$184.48               | \$0.00          | 6               | \$1,161.00 |
| Bi-Monthly Direct <input type="radio"/>                 | \$238.60           | 5                      | \$184.48               | \$0.00          | 6               | \$1,161.00 |
| Quarterly Pay Automated <input type="radio"/>           | \$353.90           | 3                      | ~ \$269.03             | \$0.00          | 4               | \$1,161.00 |
| Quarterly Pay Direct <input type="radio"/>              | \$353.90           | 3                      | ~ \$269.03             | \$0.00          | 4               | \$1,161.00 |
| Semi-Annual Automated <input type="radio"/>             | \$642.15           | 1                      | \$518.85               | \$0.00          | 2               | \$1,161.00 |
| Semi-Annual Direct <input type="radio"/>                | \$642.15           | 1                      | \$518.85               | \$0.00          | 2               | \$1,161.00 |
| Full Pay Automated <input type="radio"/>                | \$1,161.00         | -                      | -                      | -               | 1               | \$1,161.00 |
| Full Pay Direct <input type="radio"/>                   | \$1,161.00         | -                      | -                      | -               | 1               | \$1,161.00 |

The Payment Schedule will then populate with payment information.

| Payment Schedule |            |            |                    |         |             |
|------------------|------------|------------|--------------------|---------|-------------|
| #                | Bill Date  | Due Date   | Down / 1st Payment | Premium | Bill Amount |
| 01               | 11/29/2016 | 12/13/2016 |                    | 248.47  | 256.47      |
| 02               | 12/15/2016 | 12/29/2016 |                    | 90.51   | 90.51       |
| 03               | 01/15/2017 | 01/29/2017 |                    | 90.51   | 90.51       |
| 04               | 02/15/2017 | 03/01/2017 |                    | 90.51   | 90.51       |
| 05               | 03/15/2017 | 03/29/2017 |                    | 90.51   | 90.51       |
| 06               | 04/15/2017 | 04/29/2017 |                    | 90.51   | 90.51       |
| 07               | 05/15/2017 | 05/29/2017 |                    | 90.51   | 90.51       |
| 08               | 06/15/2017 | 06/29/2017 |                    | 90.51   | 90.51       |
| 09               | 07/15/2017 | 07/29/2017 |                    | 90.51   | 90.51       |
| 10               | 08/15/2017 | 08/29/2017 |                    | 90.51   | 90.51       |
| 11               | 09/15/2017 | 09/29/2017 |                    | 89.94   | 89.94       |

Save and Next Page.

## Forms

Allows you to view all forms associated with the quote/policy.

Clicking on any of the [blue hyperlinks](#) will prompt a separate window to open that will generate a PDF for the form.

Once you have viewed click out of the form and then **Next Page**.

| Forms List                                                   |           |                             |       |                                           |             |                          |                                  |
|--------------------------------------------------------------|-----------|-----------------------------|-------|-------------------------------------------|-------------|--------------------------|----------------------------------|
| Display <span>Select...</span>                               |           | Area <span>Select...</span> |       |                                           |             |                          |                                  |
| Status                                                       | Area      | Name                        | Date  | Description                               | Attached By | Info Required            |                                  |
| Attached                                                     | None      | MDW3                        | 01/05 | Dwelling Property Form                    | Coverage    | No                       | <a href="#">View Form</a>        |
| Attached                                                     | Liability | MDL1                        | 01/09 | Premises Liability                        | Coverage    | No                       | <a href="#">View Form</a>        |
| Attached                                                     | None      | MPL01                       | 01/11 | Common Provisions                         | Mandatory   | No                       | <a href="#">View Form</a>        |
| Attached                                                     | None      | MPL95                       | 08/12 | Mandatory Endorsement NJ                  | Mandatory   | No                       | <a href="#">View Form</a>        |
| Attached                                                     | None      | PHNCD                       | 09/13 | Policyholders Notice Combination Dwelling | Mandatory   | No                       | <a href="#">View Form</a>        |
| Attached                                                     | Property  | FM153                       | 09/11 | Fungi/Mold Limited Coverage               | Coverage    | No                       | <a href="#">View Form</a>        |
| Attached                                                     | Property  | FM157                       | 09/13 | Equipment Breakdown                       | Coverage    | No                       | <a href="#">View Form</a>        |
| Attached                                                     | None      | FMI21                       | 09/13 | Special Coverage Enhancement              | Coverage    | No                       | <a href="#">View Form</a>        |
| Attached                                                     | Property  | MPL48                       | 01/09 | Building Code or Law Coverage             | Coverage    | No                       | <a href="#">View Form</a>        |
| Attached                                                     | None      | SPN03                       | 05/15 | Dwelling Property Insurance               | Mandatory   | No                       | <a href="#">View Form</a>        |
| Available                                                    | Liability | MDL60                       | 01/09 | Commercial General Liability              |             | No                       | <a href="#">Attach View Form</a> |
| Available                                                    | None      | MDW29                       | 01/05 | Condominium Associations                  |             | No                       | <a href="#">Attach View Form</a> |
| <a href="#">Available</a>                                    | Property  | MPL141                      | 04/07 | Property Not Covered                      |             | <a href="#">Required</a> | <a href="#">Attach View Form</a> |
| <a href="#">Next Page</a> <a href="#">Create Application</a> |           |                             |       |                                           |             |                          |                                  |

## B. Quote – Existing Customer:

*Note: You must be on the home page*

Select CUSTOMER POLICY SEARCH from the Actions Menu (Customer Search in the Quote/Policy tab can also be used).



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[Recent List](#)

Search

Search ☐ Open New Window

Actions

Customer Policy Search

Out of Office

My Subscriptions

My Trusted Viewers

My Inbox Views

News & Announcements

Welcome to Franklin Mutual Insurance Group!!

Environment: **FMI AWS UAT**  
Release: fmi\_1\_0\_0\_24\_rc1  
Deployed on: November 9th 2016 6:00 PM Pacific Time

**Set CURRENT DATE = POSTING DATE!!**

After selecting Customer Policy Search from the Actions menu, the Customer Lookup Search is displayed. Search by Policy Number, Search by Customer or Search by Insured.

The screenshot shows the 'Customer Policy List' interface. On the left is a sidebar with a 'Search' section containing a search bar and a 'Search' button, and an 'Actions' section with a 'New Customer' button. The main area is titled 'Customer Lookup' and contains a 'Policy Number' search bar with a 'Search' button. Below this are two search sections: 'Search By Customer' and 'Search By Insured'. Each section has a dropdown menu for selecting the search type (currently set to 'Name'), a 'Text' field for the search criteria, a 'Contains' dropdown for the search type, and a 'Max Hits' dropdown set to '10'. Each section also has a 'Search' button. At the bottom, there is a 'Customer List' section with a table header: 'Customer Number', 'Customer Name', 'Entity Type', 'Email', and 'Phone Number'. The table currently shows 'Empty List'.

The Search by Customer and Search by Insured types are defaulted to “Name”, but additional Customer information types can be used in the Customer Lookup Search by selecting the type from the drop down list then entering the information into the Text field.

This screenshot shows the 'Customer Lookup' section with the 'Search By Customer' dropdown menu open. The menu lists several options: 'Name', 'Tax ID', 'Contact Number', 'Email Address', 'Customer Number', 'City', 'State', 'Zip Code', and 'Address'. The 'Text' field is currently empty, and the 'Contains' dropdown is set to 'Contains'. The 'Max Hits' dropdown is set to '10'. There are 'Search' buttons for both the 'Search By Customer' and 'Search By Insured' sections.

The Text drop down list defaults search of the text field to “Contains”, but this can be changed by selecting the desired search type from the drop down list.

This screenshot shows the 'Customer Lookup' section with the 'Search By Customer' dropdown menu open. The 'Text' field is currently empty, and the 'Contains' dropdown is set to 'Contains'. The 'Max Hits' dropdown is set to '10'. There are 'Search' buttons for both the 'Search By Customer' and 'Search By Insured' sections.

An Additional Search field can be added to either Search by Customer or Search by Insured by selecting the type from the “and” drop down lists and entering the information in the corresponding text field.

The screenshot shows the 'Customer Lookup' form. It has a 'Policy Number' field with a 'Search' button. Below it, there are two main search sections: 'Search By Customer' and 'Search By Insured'. Each section has a primary dropdown (currently 'Name') and a 'Text' field. There are also 'and' dropdowns for adding additional search criteria. For 'Search By Customer', the 'and' dropdown is open, showing options like 'Name', 'Tax ID', 'Contact Number', 'Email Address', 'Customer Number', 'City', 'State', 'Zip Code', and 'Address'. Each search section also has a 'Max Hits' dropdown set to '10' and a 'Search' button.

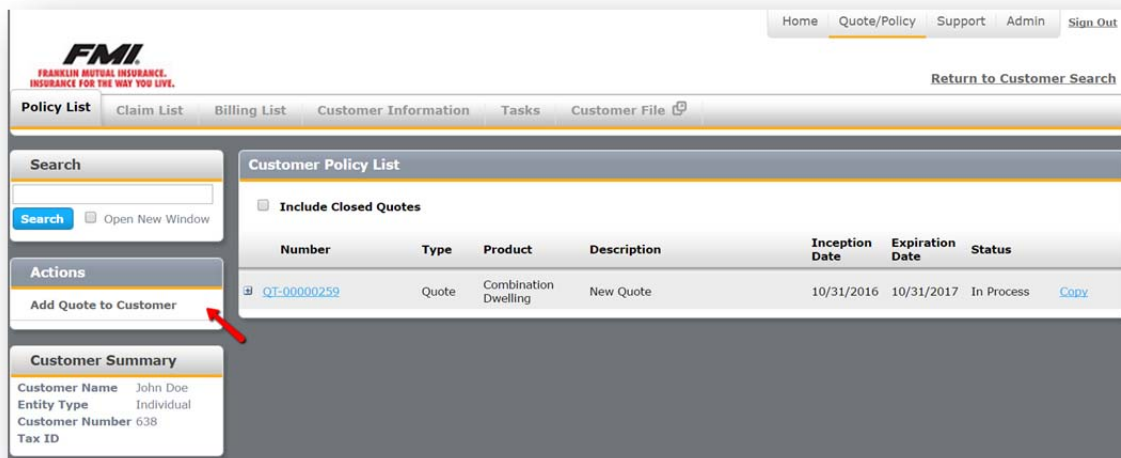
Click **Search**. Search results will display in the Customer list. Select the Customer from the list to begin the new quote (Customer Number, Customer Name, and Customer DBA are links that can be clicked on.)

This screenshot shows the same 'Customer Lookup' form, but now with search results displayed in the 'Customer List' table below. The 'Search By Customer' section has 'Name' selected and 'John Doe' entered in the 'Text' field. The 'Search' button has been clicked. The 'Customer List' table shows three results for 'John Doe'.

| Customer Number     | Customer Name            | Entity Type | Email | Phone Number   |
|---------------------|--------------------------|-------------|-------|----------------|
| <a href="#">482</a> | <a href="#">John Doe</a> | Individual  |       | (484) 123-4567 |
| <a href="#">638</a> | <a href="#">John Doe</a> | Individual  |       |                |
| <a href="#">640</a> | <a href="#">John Doe</a> | Individual  |       | (484) 123-4567 |

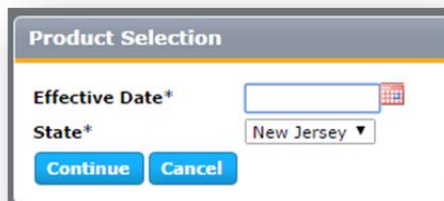
Selecting the Customer from the Customer list will display the Customer Policy list.

Select **Add Quote** to Customer from the Actions menu.



The screenshot shows the Franklin Mutual Insurance Company (FMI) Partner Platform ART User Guide for AGENTS. The top navigation bar includes links for Home, Quote/Policy, Support, Admin, and Sign Out. Below the navigation bar, there is a search bar and a list of tabs: Policy List, Claim List, Billing List, Customer Information, Tasks, and Customer File. The main content area is titled "Customer Policy List" and includes a checkbox for "Include Closed Quotes". Below this, there is a table with columns: Number, Type, Product, Description, Inception Date, Expiration Date, and Status. The table contains one row with the following data: Number: QT-00000259, Type: Quote, Product: Combination Dwelling, Description: New Quote, Inception Date: 10/31/2016, Expiration Date: 10/31/2017, Status: In Process. To the left of the table, there is an "Actions" menu with a button labeled "Add Quote to Customer", which is highlighted with a red arrow. Below the Actions menu, there is a "Customer Summary" section with fields for Customer Name (John Doe), Entity Type (Individual), Customer Number (638), and Tax ID.

After Selecting New Quote from the Actions menu, the Product Selection page is displayed.



The screenshot shows the "Product Selection" page. It features two input fields: "Effective Date\*" and "State\*". The "Effective Date\*" field has a calendar icon next to it. The "State\*" field is a dropdown menu currently showing "New Jersey". Below these fields are two buttons: "Continue" and "Cancel".

Enter the Effective Date (State is pre-populated). *NOTE: Effective date can be entered manually, or can be selected using the Calendar tool.*

Click **Continue**.

After clicking Continue, the Quote tabs are available, and the Policy tab is displayed.

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Home Quote/Policy Support Admin Sign Out

Return to Policy List Save & Next Page

Quote Tasks Policy File

**Policy** Combination Dwelling Loss History Review & Print Forms Price Compare

**Search**

Search Open New Window

**Actions**

Save  
Close  
Delete Quote  
Copy Quote  
Request Review  
View Producer

**Policy General**

Product\* New Jersey - Combination Dwelling - FMI Insurance Company  
Policy Form\* Select...  
Occupancy\* Select...  
Effective Date\* 12/01/2016  
Expiration Date\* 12/01/2017  
Producer Code\* 001000 Gansfuss Agency  
Prior Carrier Select...  
Policy Source\* New Business Application  
Prior Policy Expiration Date

**Insurance Score**

Doe, John

**Quote Summary**

Quote Number QT-00000273  
Insured John Doe  
Effective 12/01/2016  
Product Combination Dwelling  
Sub Type  
Premium \$0.00  
Status In Process

**Insured Information**

Entity Type\* Individual  
Individual  
First\* John Middle Last\* Doe Suffix  
Name\* John Doe Refresh This is how the name will print on the Declaration Page  
DOB 01/01/1990  
Primary Phone Select...  
Email  
Dwelling Address  
Location Format\* Select...  
Location Address Number\* Direction Street\* Suffix Post Dir Type  
City\* State\* Zip\* New Jersey  
County  
Last Inspection Received Date

Save & Next Page Save

In the Policy tab, enter all required information (marked by an asterisks). The Insured Information tile should automatically display the Customer Information.

Click **Save & Next Page**.

Continue filling out quote as described on page 7-14.

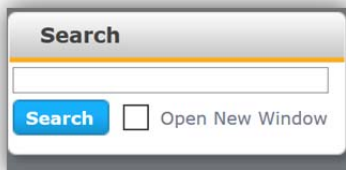
## C. Quote Options - Search Quote, Copy Quote, Close Quote, Reopen Quote, Reopen New Quote, Delete Quote

*\*NOTE: While in the Quote screens, the Action menu displays possible actions that can be completed.*

### 1. Search Quote

#### a) Search using Search tile:

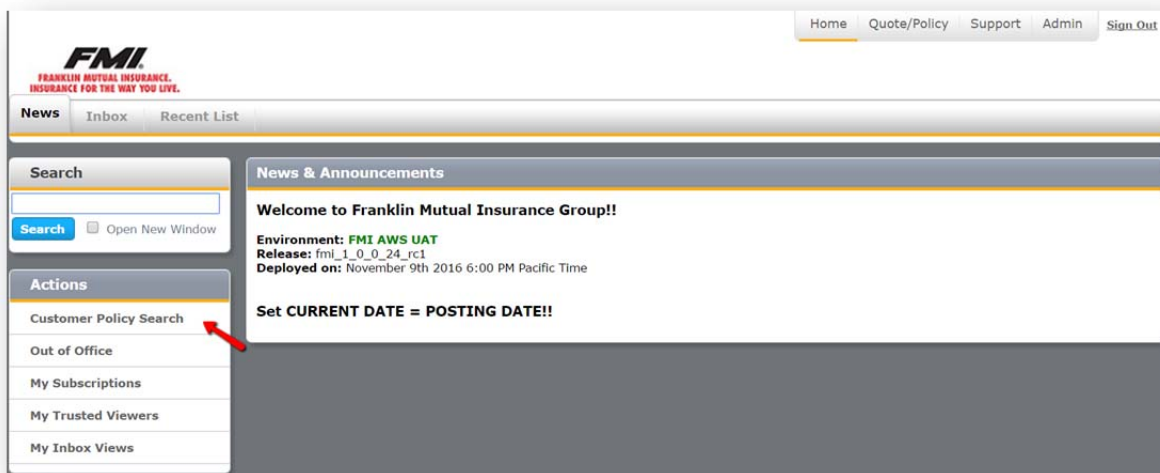
Enter the Quote number into the Search tile and select Search.

A small rectangular search tile with a grey header containing the word "Search". Below the header is a white input field. Underneath the input field is a blue button labeled "Search" and a checkbox labeled "Open New Window".

Upon selecting Search, the Customer Policy list will display and the Quote can be accessed.

#### b) Search Using Customer Policy Search:

Select CUSTOMER POLICY SEARCH from the Actions Menu (Customer Search in the Quote/Policy tab can also be used)



After selecting Customer Policy Search from the Actions menu or Quote/Policy tab, the Customer Lookup Search is displayed. Search by Policy Number (Quote Number), Search by Customer or Search by Insured.


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[Return to Inbox](#)

**Customer Policy List**

Search

☐ Open New Window

Actions

Customer Lookup

Policy Number

Search By Customer

Name

Text

Contains

and

Select...

Text

Contains

Search By Insured

Name

Text

Contains

and

Select...

Text

Contains

Max Hits

10

▼

Customer List

Customer Number

Customer Name

Entity Type

Email

Phone Number

Empty List

The Search by Customer and Search by Insured types are defaulted to “Name”, but additional Customer information types can be used in the Customer Lookup Search by selecting the type from the drop down list then entering the information into the **Text** field.

Customer Lookup

Policy Number

Search

Search By Customer

and

Search By Insured

and

Name

Tax ID

Contact Number

Email Address

Customer Number

City

State

Zip Code

Address

Text

Contains

Text

Contains

Text

Contains

Text

Contains

Max Hits

10

Search

The **Text** drop down list defaults search of the text field to “Contains”, but this can be changed by selecting the desired search type from the drop down list.

**Customer Lookup**

Policy Number

Search By Customer  Text   
 and  Text   
 Max Hits

Search By Insured  Text   
 and  Text   
 Max Hits

An Additional Search field can be added to either Search by Customer or Search by Insured by selecting the type from the “and” drop down lists and entering the information in the corresponding text field.

The screenshot shows the 'Customer Lookup' form. It has a 'Policy Number' field with a 'Search' button. Below this, there are two main sections: 'Search By Customer' and 'Search By Insured'. Each section has a dropdown menu for selecting a search type, a 'Text' field for entering the search criteria, and a 'Max Hits' dropdown set to 10. A 'Search' button is next to each 'Max Hits' dropdown. A 'Customer List' dropdown is at the bottom left.

Click **Search**.

Search results will display in the Customer list. Select the Customer from the list.

The screenshot shows the 'Customer Lookup' form with search criteria entered. The 'Search By Customer' dropdown is set to 'Name', the 'Text' field contains 'John Doe', and the 'Max Hits' dropdown is set to 10. The 'Search' button is highlighted. Below the form, the 'Customer List' is displayed as a table with columns: Customer Number, Customer Name, Entity Type, Email, and Phone Number. The table contains three rows of data for 'John Doe'.

| Customer Number | Customer Name | Entity Type | Email | Phone Number   |
|-----------------|---------------|-------------|-------|----------------|
| 482             | John Doe      | Individual  |       | (484) 123-4567 |
| 638             | John Doe      | Individual  |       |                |
| 640             | John Doe      | Individual  |       | (484) 123-4567 |

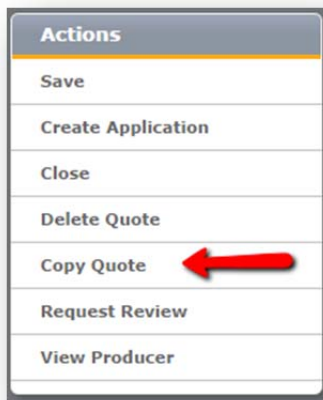
Selecting the Customer from the Customer list will display the Customer Policy list and the Quote can be accessed.

2. Copy Quote- from the Actions Menu (NEW QUOTE or LINKED QUOTE)

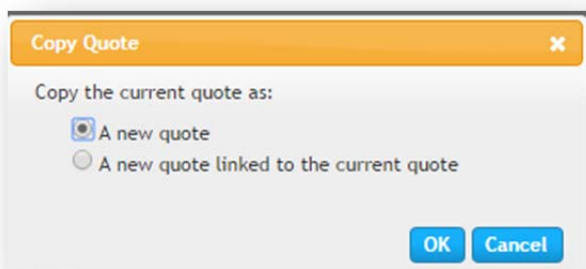
A 'Linked' quote is used to produce comparative quotes whereas 'New Quote' will only create a copy of an existing quote.

a) COPY NEW QUOTE FROM THE ACTIONS MENU

Select Copy Quote from the Action Menu



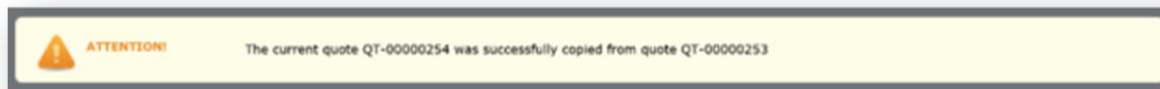
The copy quote as: will appear.



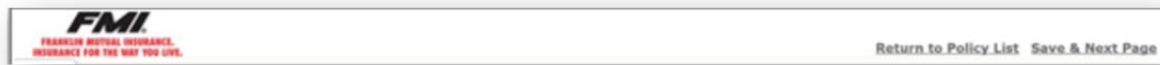
Select Copy the current quote as: **A new quote**

Click **OK**

Message: "The current quote QT-XXXXXXX was successfully copied from quote QT-XXXXXXX" is displayed



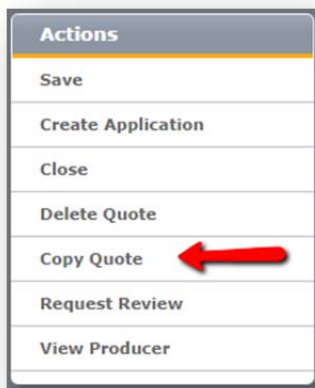
Click **Return to Policy List** on the top right hand corner to view the policy to and verify that the new and old quote are listed.



| Customer Policy List                           |       |                      |             |                |                 |            |                           |
|------------------------------------------------|-------|----------------------|-------------|----------------|-----------------|------------|---------------------------|
| <input type="checkbox"/> Include Closed Quotes |       |                      |             |                |                 |            |                           |
| Number                                         | Type  | Product              | Description | Inception Date | Expiration Date | Status     |                           |
| <a href="#">QT-00000243</a>                    | Quote | Combination Dwelling | New Quote   | 05/31/2016     | 05/31/2017      | In Process | <a href="#">More Info</a> |
| <a href="#">QT-00000244</a>                    | Quote | Combination Dwelling | New Quote   | 05/31/2016     | 05/31/2017      | In Process | <a href="#">More Info</a> |
| <a href="#">QT-00000219</a>                    | Quote | Combination Dwelling | New Quote   | 05/16/2016     | 05/16/2017      | In Process | <a href="#">More Info</a> |

b) COPY LINKED QUOTE FROM THE ACTIONS MENU

Select **Copy Quote** from the Action Menu



Select Copy the current quote as: **A new quote linked to the current quote** and enter any descriptions.

Copy Quote

Copy the current quote as:

☐ A new quote

☒ A new quote linked to the current quote

Description of the current quote:

\$500 DED

Description of the new quote:

\$1000 DED

Note: When any member of a group of linked quotes is changed to an application, all other linked quotes will be automatically closed. Closed quotes can be re-opened at any time.

OK

Cancel

Click **OK**

Message: “The current quote QT-XXXXXXX was successfully copied from quote QT-XXXXXXX” is displayed

 **ATTENTION!**

The current quote QT-00000255 was successfully copied from quote QT-00000254

Linked Quotes tile will be displayed on the **LEFT HAND SIDE** of the screen, located under the Quote Summary tile.

Quote Summary

Quote Number

QT-00000255

Insured

[Cindy Flintstone](#)

Effective

05/31/2016

Product

Combination Dwelling

Sub Type

Premium

\$0.00

Status

In Process

Linked Quotes

[QT-00000254](#)

\$0.00

**Click** on the Combination Dwelling chevron up top. Change screen to reflect what you would like to see in your new quote for example (deductible change) and **click** save.

### c) Price Compare

From the Quote screen, select the **Price Compare** Chevron.

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Home Quote/Policy Support Admin Sign Out

Return to Policy List Save & Next Page

Quote Tasks Policy File

Policy Combination Dwelling Loss History Review & Print Forms Price Compare

**Search**

Search Open New Window

**Actions**

Save  
Close  
Delete Quote  
Copy Quote  
Request Review

**Policy General**

Product\* New Jersey - Combination Dwelling - FMI Insurance Company  
Policy Form\* Select...  
Occupancy\* Select...  
Effective Date\* 11/29/2016 Expiration Date\* 11/29/2017  
Producer Code\* 001000 Gansfuss Agency  
Prior Carrier Select...  
Policy Source\* New Business Application  
Prior Policy Expiration Date

**Insurance Score**

Jones, Rebecca

After selecting the Price compare tab, the Price Compare screen is displayed showing the comparison of the linked quotes.

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Home Quote/Policy Support Admin Sign Out

Return to Policy List Save & Next Page

Quote Tasks Policy File

Policy Combination Dwelling Loss History Review & Print Forms Price Compare

**Search**

Search Open New Window

**Actions**

Save  
Create Application  
Close  
Delete Quote  
Copy Quote  
Request Review  
View Producer

**Price Compare**

| Field                                | QT-00000261<br>\$1k Ded | QT-00000262<br>\$500 Ded |
|--------------------------------------|-------------------------|--------------------------|
| A - Dwelling Limit                   | \$368,100               | \$368,100                |
| B - Related Structures Limit         | \$36,810                | \$36,810                 |
| C - Personal Property Limit          | \$0                     | \$0                      |
| D - Loss of Use Limit                | \$73,620                | \$73,620                 |
| E - Personal Liability Limit         | \$300,000               | \$300,000                |
| F - Medical Payments to Others Limit | \$3,000                 | \$3,000                  |
| Deductible (All Other Perils)        | \$1,000                 | \$500                    |
| <b>Premium</b>                       | <b>\$1,211.00</b>       | <b>\$1,318.00</b>        |
| <b>Premium with Taxes/Fees</b>       | <b>\$1,219.00</b>       | <b>\$1,327.00</b>        |

Next Page Create Application

**Quote Summary**

Quote Number QT-00000261  
Insured Rebecca Jones  
Effective 11/29/2016  
Product Combination Dwelling  
Sub Type MDW3  
Premium \$1,219.00  
Status In Process

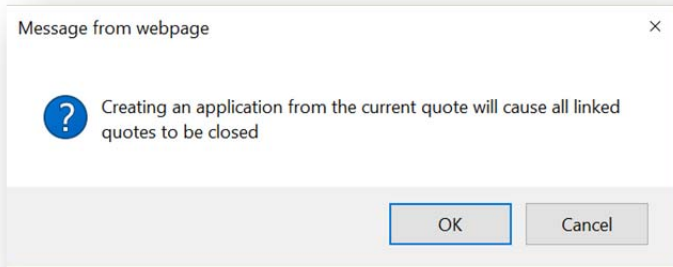
**Linked Quotes**

QT-00000262 \$1,327.00  
\$500 Ded

Click on the [blue hyperlink](#) of the desired quote.

**NOTE:** User can manually delete the linked quote that is not desired, or may select Create Application and the application will be created from the current quote and the linked quotes will automatically be closed.

**Make sure you are on the wanted quote.**



Click RETURN TO POLICY LIST in the top right hand corner to view the policy to and verify that the new linked quote and the old quote are listed. **Note:** Return to Policy List will only display if there are multiple quotes for an insured.



| Customer Policy List                           |       |                      |             |                |                 |            |                                              |
|------------------------------------------------|-------|----------------------|-------------|----------------|-----------------|------------|----------------------------------------------|
| <input type="checkbox"/> Include Closed Quotes |       |                      |             |                |                 |            |                                              |
| Number                                         | Type  | Product              | Description | Inception Date | Expiration Date | Status     |                                              |
| <a href="#">QT-00000253</a>                    | Quote | Combination Dwelling | New Quote   | 05/31/2016     | 05/31/2017      | In Process | <a href="#">More</a><br><a href="#">Copy</a> |
| <b>Linked Quotes</b>                           |       |                      |             |                |                 |            |                                              |
| <a href="#">QT-00000254</a>                    | Quote | Combination Dwelling | New Quote   | 05/31/2016     | 05/31/2017      | In Process | <a href="#">More</a><br><a href="#">Copy</a> |
| <a href="#">QT-00000255</a>                    | Quote | Combination Dwelling | New Quote   | 05/31/2016     | 05/31/2017      | In Process | <a href="#">More</a><br><a href="#">Copy</a> |
| <a href="#">QT-00000219</a>                    | Quote | Combination Dwelling | New Quote   | 05/16/2016     | 05/16/2017      | In Process | <a href="#">More</a><br><a href="#">Copy</a> |

d) [COPY NEW QUOTE OR LINKED QUOTE FROM THE POLICY LIST](#)

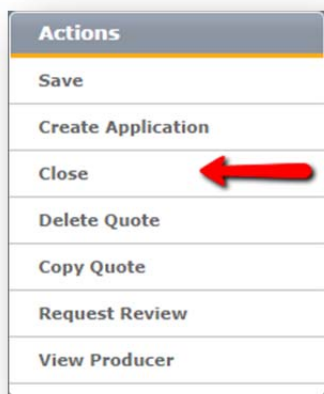
From the Customer Policy List, select “Copy” on the corresponding policy listed.

| Customer Policy List                                                                                          |       |                      |             |                |                 |            |                           |
|---------------------------------------------------------------------------------------------------------------|-------|----------------------|-------------|----------------|-----------------|------------|---------------------------|
| <input type="checkbox"/> Include Closed Quotes                                                                |       |                      |             |                |                 |            |                           |
| Number                                                                                                        | Type  | Product              | Description | Inception Date | Expiration Date | Status     |                           |
|  <a href="#">QT-00000253</a> | Quote | Combination Dwelling | New Quote   | 05/31/2016     | 05/31/2017      | In Process | <a href="#">More Copy</a> |
| <b>Linked Quotes</b>                                                                                          |       |                      |             |                |                 |            |                           |
|  <a href="#">QT-00000254</a> | Quote | Combination Dwelling | New Quote   | 05/31/2016     | 05/31/2017      | In Process | <a href="#">More Copy</a> |
|  <a href="#">QT-00000255</a> | Quote | Combination Dwelling | New Quote   | 05/31/2016     | 05/31/2017      | In Process | <a href="#">More Copy</a> |
|  <a href="#">QT-00000219</a> | Quote | Combination Dwelling | New Quote   | 05/16/2016     | 05/16/2017      | In Process | <a href="#">More Copy</a> |

Refer to [C. Quote Options-section 2A, #2.](#)

3. Close Quote (only available from the Actin menu in the Quote)

Select **Close** from the Action Menu.



Select a **reason** from the drop down list.

A screenshot of the 'Close Quote' form. The form has a grey header with the 'FMI' logo and the tagline 'FRANKLIN MUTUAL INSURANCE. INSURANCE FOR THE WAY YOU LIVE.' on the left, and a 'Return to Quote' link on the right. Below the header, there is a 'Close Quote' section. On the left side of this section, there is a 'Search' box with a 'Search' button and an 'Open New Window' checkbox. Below the search box is an 'Actions' button that says 'No Actions'. The main area of the 'Close Quote' section contains a 'Reason\*' dropdown menu with 'Select...' as the current selection. Below the dropdown is a 'Comments\*' text area with a 'Close' button. The dropdown menu is open, showing a list of options: 'Select...', 'Select...', 'Company Guidelines', and 'Insured Went Elsewhere'.

Upon selecting Company Guidelines from the Reason drop down list, the Detail field is display and user is required to select a detail from the drop down list.

A screenshot of the 'Close Quote' form, showing the 'Reason\*' dropdown menu set to 'Company Guidelines'. Below it, the 'Detail\*' dropdown menu is open, showing a list of options: 'Select...', 'Select...', 'Loss History', 'Below Min Cov A Limits', 'Non Owner Occupied Over 2 Family', 'Located Less Than 5 Miles from Ocean, Bay, Intercoastal Waterway', 'Vacant/Unoccupied', 'Row Type Dwellings - Does Not Apply To Townhouse or Duplex', 'Clearance of Less than 8 Feet Between Adjacent Exposures', 'Open Foundation', 'Mobile Homes or HUD Homes', 'EIFS Not More Than 25%', 'Flat or Rolled Roof', 'Trampolines', 'Swimming Pool Slides', 'Gasoline Tank on Premise', 'Aggressive Dog/Bite History (see list of unacceptable dogs)', and 'Unacceptable Credit Scores'. The 'Comments\*' text area and the 'Close' button are also visible.

Upon selecting Insured Went Elsewhere from the Reason drop down list, the Detail field is displayed and is pre-populated with the “Notified by Agent” detail.

Close Quote

Reason\*

Insured Went Elsewhere

Detail\*

Notified by Agent

Select...

Notified by Agent

Comments\*

Close

Enter Comments (Required-marked with an asterisks\*)

Click **Close**.

The Customer Policy List screen is displayed. The closed quote can be seen by clicking the checkmark box “Include Closed Quotes”

| Customer Policy List                                 |       |                      |             |                |                 |            |                                              |
|------------------------------------------------------|-------|----------------------|-------------|----------------|-----------------|------------|----------------------------------------------|
| <input type="checkbox"/> Include Closed Quotes       |       |                      |             |                |                 |            |                                              |
| Number                                               | Type  | Product              | Description | Inception Date | Expiration Date | Status     |                                              |
| Linked Quotes                                        |       |                      |             |                |                 |            |                                              |
| <input type="checkbox"/> <a href="#">QT-00000254</a> | Quote | Combination Dwelling | New Quote   | 05/31/2016     | 05/31/2017      | In Process | <a href="#">Move</a><br><a href="#">Copy</a> |
| <input type="checkbox"/> <a href="#">QT-00000255</a> | Quote | Combination Dwelling | New Quote   | 05/31/2016     | 05/31/2017      | In Process | <a href="#">Move</a><br><a href="#">Copy</a> |
| <input type="checkbox"/> <a href="#">QT-00000219</a> | Quote | Combination Dwelling | New Quote   | 05/16/2016     | 05/16/2017      | In Process | <a href="#">Move</a><br><a href="#">Copy</a> |

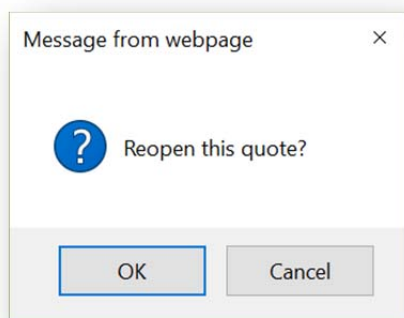
| Customer Policy List                                            |       |                      |             |                |                 |            |                                                                                                  |
|-----------------------------------------------------------------|-------|----------------------|-------------|----------------|-----------------|------------|--------------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> Include Closed Quotes       |       |                      |             |                |                 |            |                                                                                                  |
| Number                                                          | Type  | Product              | Description | Inception Date | Expiration Date | Status     |                                                                                                  |
| <input checked="" type="checkbox"/> <a href="#">QT-00000253</a> | Quote | Combination Dwelling | New Quote   | 05/31/2016     | 05/31/2017      | Closed     | <a href="#">Open</a><br><a href="#">Open New</a><br><a href="#">Move</a><br><a href="#">Copy</a> |
| Linked Quotes                                                   |       |                      |             |                |                 |            |                                                                                                  |
| <input type="checkbox"/> <a href="#">QT-00000254</a>            | Quote | Combination Dwelling | New Quote   | 05/31/2016     | 05/31/2017      | In Process | <a href="#">Move</a><br><a href="#">Copy</a>                                                     |
| <input type="checkbox"/> <a href="#">QT-00000255</a>            | Quote | Combination Dwelling | New Quote   | 05/31/2016     | 05/31/2017      | In Process | <a href="#">Move</a><br><a href="#">Copy</a>                                                     |
| <input type="checkbox"/> <a href="#">QT-00000219</a>            | Quote | Combination Dwelling | New Quote   | 05/16/2016     | 05/16/2017      | In Process | <a href="#">Move</a><br><a href="#">Copy</a>                                                     |

#### 4. Reopen Quote (only available from the Policy List)

Select Include Closed Quotes in the Customer Policy list.

| Customer Policy List                                      |        |                      |                      |                |                 |            |                                                                          |
|-----------------------------------------------------------|--------|----------------------|----------------------|----------------|-----------------|------------|--------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> Include Closed Quotes |        |                      |                      |                |                 |            |                                                                          |
| Number                                                    | Type   | Product              | Description          | Inception Date | Expiration Date | Status     |                                                                          |
| Linked Quotes                                             |        |                      |                      |                |                 |            |                                                                          |
| <a href="#">QT-00000261</a>                               | Quote  | Combination Dwelling | \$1k Ded             | 11/29/2016     | 11/29/2017      | In Process | <a href="#">Copy</a>                                                     |
| <a href="#">QT-00000262</a>                               | Quote  | Combination Dwelling | \$500 Ded            | 11/29/2016     | 11/29/2017      | Closed     | <a href="#">Open</a><br><a href="#">Open New</a><br><a href="#">Copy</a> |
| <a href="#">QT-00000073</a>                               | Quote  | Combination Dwelling | New Quote            | 10/28/2016     | 10/28/2017      | Closed     | <a href="#">Open</a><br><a href="#">Open New</a><br><a href="#">Copy</a> |
| <a href="#">FDW0000054</a>                                | Policy | Combination Dwelling | Combination Dwelling | 10/28/2016     | 10/28/2017      | Active     | <a href="#">Report a Loss</a><br><a href="#">Make Payment</a>            |

Select "Open" on the corresponding policy listed.



Click **OK**

The Customer Policy list is displayed. The Closed quote will now appear as **In Process**.

| Customer Policy List                                      |        |                      |                      |                |                 |            |                                                                          |
|-----------------------------------------------------------|--------|----------------------|----------------------|----------------|-----------------|------------|--------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> Include Closed Quotes |        |                      |                      |                |                 |            |                                                                          |
| Number                                                    | Type   | Product              | Description          | Inception Date | Expiration Date | Status     |                                                                          |
| Linked Quotes                                             |        |                      |                      |                |                 |            |                                                                          |
| <a href="#">QT-00000261</a>                               | Quote  | Combination Dwelling | \$1k Ded             | 11/29/2016     | 11/29/2017      | In Process | <a href="#">Copy</a>                                                     |
| <a href="#">QT-00000262</a>                               | Quote  | Combination Dwelling | \$500 Ded            | 11/29/2016     | 11/29/2017      | Closed     | <a href="#">Open</a><br><a href="#">Open New</a><br><a href="#">Copy</a> |
| <a href="#">QT-00000073</a>                               | Quote  | Combination Dwelling | New Quote            | 10/28/2016     | 10/28/2017      | In Process | <a href="#">Copy</a>                                                     |
| <a href="#">FDW0000054</a>                                | Policy | Combination Dwelling | Combination Dwelling | 10/28/2016     | 10/28/2017      | Active     | <a href="#">Report a Loss</a><br><a href="#">Make Payment</a>            |

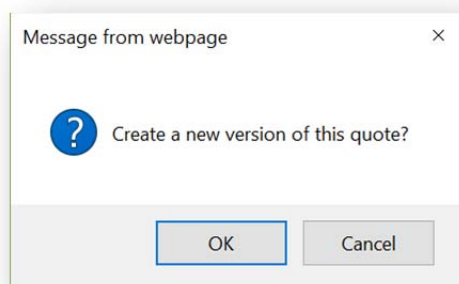
## 5. Reopen New Quote

Select Include Closed Quotes in the Customer Policy list.

| Customer Policy List                                      |        |                      |                      |                |                 |            |                                                                          |
|-----------------------------------------------------------|--------|----------------------|----------------------|----------------|-----------------|------------|--------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> Include Closed Quotes |        |                      |                      |                |                 |            |                                                                          |
| Number                                                    | Type   | Product              | Description          | Inception Date | Expiration Date | Status     |                                                                          |
| Linked Quotes                                             |        |                      |                      |                |                 |            |                                                                          |
| <a href="#">QT-00000261</a>                               | Quote  | Combination Dwelling | \$1k Ded             | 11/29/2016     | 11/29/2017      | In Process | <a href="#">Copy</a>                                                     |
| <a href="#">QT-00000262</a>                               | Quote  | Combination Dwelling | \$500 Ded            | 11/29/2016     | 11/29/2017      | Closed     | <a href="#">Open</a><br><a href="#">Open New</a><br><a href="#">Copy</a> |
| <a href="#">QT-00000073</a>                               | Quote  | Combination Dwelling | New Quote            | 10/28/2016     | 10/28/2017      | In Process | <a href="#">Copy</a>                                                     |
| <a href="#">FDW0000054</a>                                | Policy | Combination Dwelling | Combination Dwelling | 10/28/2016     | 10/28/2017      | Active     | <a href="#">Report a Loss</a><br><a href="#">Make Payment</a>            |

Select "Open New" on the corresponding policy listed.

Click OK.

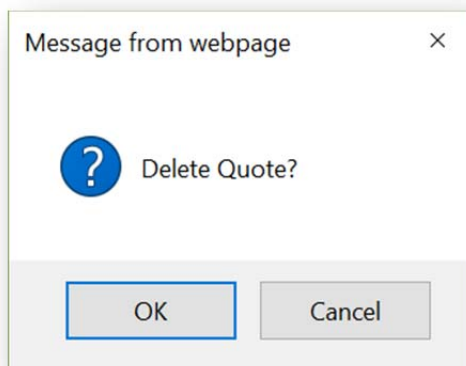
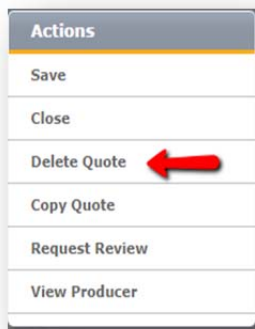


The Customer Policy list is displayed. The Closed quote will still be listed as Closed and a new quote will be listed as In Process.

| Customer Policy List                                      |        |                      |                      |                |                 |            |                                                                          |
|-----------------------------------------------------------|--------|----------------------|----------------------|----------------|-----------------|------------|--------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> Include Closed Quotes |        |                      |                      |                |                 |            |                                                                          |
| Number                                                    | Type   | Product              | Description          | Inception Date | Expiration Date | Status     |                                                                          |
| Linked Quotes                                             |        |                      |                      |                |                 |            |                                                                          |
| <a href="#">QT-00000261</a>                               | Quote  | Combination Dwelling | \$1k Ded             | 11/29/2016     | 11/29/2017      | In Process | <a href="#">Copy</a>                                                     |
| <a href="#">QT-00000262</a>                               | Quote  | Combination Dwelling | \$500 Ded            | 11/29/2016     | 11/29/2017      | Closed     | <a href="#">Open</a><br><a href="#">Open New</a><br><a href="#">Copy</a> |
| <a href="#">QT-00000263</a>                               | Quote  | Combination Dwelling | \$500 Ded            | 11/29/2016     | 11/29/2017      | In Process | <a href="#">Copy</a>                                                     |
| <a href="#">QT-00000073</a>                               | Quote  | Combination Dwelling | New Quote            | 10/28/2016     | 10/28/2017      | In Process | <a href="#">Copy</a>                                                     |
| <a href="#">FDW0000054</a>                                | Policy | Combination Dwelling | Combination Dwelling | 10/28/2016     | 10/28/2017      | Active     | <a href="#">Report a Loss</a><br><a href="#">Make Payment</a>            |

6. Delete Quote (only available from the Actions menu in the Quote)

Select Delete Quote from the Actions Menu.



Click **OK**.

*The Customer Policy List screen is displayed. The deleted quote is no longer in the customer Policy List.*

### 3. Application

This is the first step to starting the application phase from a quote.

#### A. Convert Quote to Application

While still in Quote Click Create Application

**Price Compare**

| Field                                | QT-00000090<br>\$500 DED | QT-00000100<br>\$1000 DED |
|--------------------------------------|--------------------------|---------------------------|
| A - Dwelling Limit                   | \$250,000                | \$250,000                 |
| B - Related Structures Limit         | \$25,000                 | \$25,000                  |
| C - Personal Property Limit          | \$0                      | \$0                       |
| D - Loss of Use Limit                | \$50,000                 | \$50,000                  |
| E - Personal Liability Limit         | \$300,000                | \$300,000                 |
| F - Medical Payments to Others Limit | \$3,000                  | \$3,000                   |
| Deductible (All Other Perils)        | \$500                    | \$1,000                   |
| <b>Premium</b>                       | <b>\$937.00</b>          | <b>\$868.00</b>           |
| <b>Premium with Taxes/Fees</b>       | <b>\$945.00</b>          | <b>\$876.00</b>           |

**Quote Summary**

Quote Number: QT-00000090  
 Insured: John Doe  
 Effective: 10/31/2016  
 Product: Combination Dwelling  
 Sub Type: MDW3  
 Premium: \$945.00  
 Status: In Process

**Linked Quotes**

QT-00000100 \$876.00  
 \$1000 DED

**Next Page** **Create Application**

uat-fmi.iscs.com says:  
 Creating an application from the current quote will cause all linked quotes to be closed

OK Cancel

## B. To Complete Messages

Attention message will display to instruct the user on items that have not been completed or that will prohibit the user from finalizing the application.

When applicable, select the **Click Here** hyperlink located next to the issue listed in the **To Complete** message to navigate to the appropriate screen/item that needs to be entered. (Required fields that have not yet been entered will display in RED font color.)

Follow the Click Here link in the error message or manually navigate to the additional information required by selecting the Policy tab.



Once you select “click here” the Underwriting Questions will populate for you to fill out. Once completed click “Save & Next Page”.

A screenshot of a 'Questions' form. It has a grey header with the text 'Questions'. Below the header, there is a list of 14 questions, each followed by a 'Select...' dropdown menu. The questions are: 1. Swimming Pool on Premises\*, 2. Dogs Owned or Cared For By Owner or Tenant\*, 3. Does Anyone Conduct a Business at or From the Insured Premises?\*, 4. Is Dwelling Scheduled for or Under Renovation?\*, 5. Trampoline\*, 6. Has This Insurance Ever Been Terminated or Refused?\*, 7. Exterior Insulating Finishing System on Dwelling?\*, 8. Flat or Rolled Roof\*, 9. Clearance of Less Than 8 Feet Between Adjacent Exposures\*, 10. Has There Been a Lapse in Coverage?\*, 11. Farm Exposure\*, 12. Farm Rented to Others\*, 13. Other Structures on Property - Dwellings, Stables, Barns or Greenhouses\*, 14. Is this a Builder's Risk / new construction?\*. The asterisk (\*) indicates required fields.

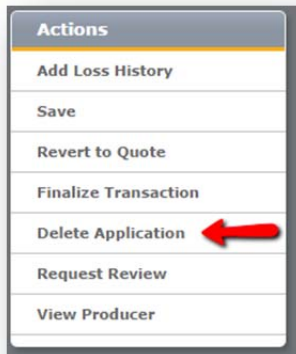
Complete all Questions. If “Yes” is selected for the Underwriting Questions, additional questions or description fields may display and are required.

Select **Save**.

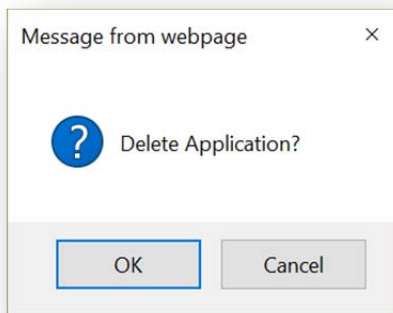


## C. Delete Application

Under the application Tab, click **Delete Application** from the Actions Menu



Click OK



## D. Additional Interests

Additional Interests tab- View Additional Interests, Add Additional Interests.

The screenshot displays the Franklin Mutual Insurance Company (FMI) Partner Platform ART User Guide for AGENTS. The interface includes a top navigation bar with links for Home, Quote/Policy, Support, Admin, and Sign Out. Below this is a breadcrumb trail: Policy > Underwriting Questions > Combination Dwelling > Loss History > **Additional Interests** > Review & Print > Forms > Premium Info. The main content area is divided into several sections:

- Search:** A search bar with a "Search" button and a checkbox for "Open New Window".
- Actions:** A list of actions including "Add Additional Interest", "Save", "Revert to Quote", "Finalize Transaction", "Delete Application", "Request Review", and "View Producer".
- Application Summary:** A table showing application details:
 

|                    |                          |
|--------------------|--------------------------|
| Application Number | AP-00000247              |
| Insured            | <a href="#">John Doe</a> |
| Inception          | 10/31/2016               |
| Product            | Combination Dwelling     |
| Sub Type           | MDW3                     |
| Term Effective     | 10/31/2016               |
| Premium            | \$944.00                 |
| Status             | In Process               |
- To Complete:** A yellow banner with a red "x" icon and the text: "A policy mortgagee is required with mortgagee bill [click here...](#)".
- Additional Interest List:** A table with columns: Number, Name, Interest Type, and Loan Number. The table is currently empty, with the text "Empty List" displayed below the header. There are "Next Page" and "Finalize Transaction" buttons at the bottom of the list.

### 1. Add Additional Interest

Select Add Additional Interest from the Actions menu

The screenshot shows a dropdown menu titled "Actions". The menu contains the following options:

- Add Additional Interest**
- Save
- Revert to Quote
- Finalize Transaction
- Delete Application
- Request Review
- View Producer

Enter required information (marked by an asterisks\*)

Additional Interest Detail

Number1

Code

Interest Type\*

Select...

Loan Number

Forms

Select...

Name\*

Mail To Name\*

Copy From Name

Country\*

United States

Care of c/o

Address\*

City\*, State\* Zip\*

Select...

Address Lookup

Phone Type

Select...

Phone NumberPhone Type

Select...

Phone Number

Fax Number

Email AddressDelivery Preference

No Preference

Instructions

Comments

Has an interest in:

☒ Policy

☐ Dwelling 1-Primary Dwelling

Save

Save and Copy

Select **Save**.  
The below will pull to give you an option to change, delete or copy.

Additional Interest List

Show Deleted Items

| Number       | Name          | Interest Type   | Loan Number                   |
|--------------|---------------|-----------------|-------------------------------|
| <div>1</div> | Lakeland Bank | First Mortgagee | <div>Change Delete Copy</div> |

## 4. Issue New Business

Select Finalize Transaction from the Actions menu

| Actions                 |
|-------------------------|
| Add Additional Interest |
| Save                    |
| Revert to Quote         |
| Finalize Transaction    |
| Delete Application      |
| Request Review          |
| View Producer           |

Cash with Application

*If physical check is received it , must be entered s an e-check (ACH).*

| Cash With Application |                                    |
|-----------------------|------------------------------------|
| Payment Type*         | Credit Card ▼                      |
| Credit Card Number    | Select...<br>Cash<br>Check<br>ACH  |
| Transaction Requ      | Credit Card<br>None                |
| Amount*               | \$256.47 Enter Credit Card Details |

Output Pending - Click Preview Output to preview the pending output. The output displays in a new window.

| Output Pending                        |          |                                |           |                                           |                       |                 |                                          |
|---------------------------------------|----------|--------------------------------|-----------|-------------------------------------------|-----------------------|-----------------|------------------------------------------|
| Pending Output - New Business Package |          |                                |           |                                           |                       |                 |                                          |
| Include                               | Modified | Document                       | Recipient | Name                                      | Forms                 | Delivery Method | Destination                              |
| <input checked="" type="checkbox"/>   |          | Insured New Business Package   | Insured   | John Doe                                  | Full Declaration      | Print and Mail  | 5 Broad St Branchville NJ 07826-5601     |
| <input checked="" type="checkbox"/>   |          | Producer New Business Package  | Producer  | Gansfuss Agency                           | Declaration + Fillin  | Local Printer   |                                          |
| <input checked="" type="checkbox"/>   |          | Mortgagee New Business Package | Mortgagee | Lakeland Bank Its Succ &/or Assigns ATIMA | Mortgagee Declaration | Print and Mail  | 250 Oak Ridge Rd Oak Ridge NJ 07438-8906 |

Modify Application - Click Modify Application to go back into the Application and make any changes.

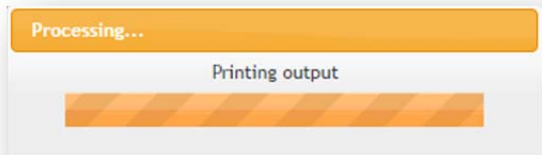
|                    |
|--------------------|
| Modify Application |
|--------------------|

## Issue New Business

**Issue New Business**

Click **Issue New Business** to finalize the transaction.

The Processing box will pop up. This may take a few seconds. Once it is done both the Application and Dec Page will appear in separate windows.



If Underwriter approval is needed you will **NOT** see the Issue New Business button.

You will see Submit for Approval (will send task to Underwriter to look at application and make a decision)

Modify Application (you can go back to the application and make changes)

**Submit For Approval** **Modify Application**

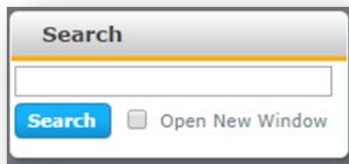
You are now in the History Tab

The screenshot shows the FMI Partner Platform ART user interface. At the top, there's a navigation bar with links: Home, Quote/Policy, Support, Admin, and Sign Out. Below this is a tabbed interface with tabs: Policy, History (selected), Tasks, Policy File, Claims, and Billing. A red arrow points to the 'History' tab. On the left side, there's a 'Search' section with a search bar and a 'Search' button, and an 'Actions' section with buttons for 'Process Change', 'Report a Loss', and 'Make Payment'. Below the 'Actions' is a 'Policy Summary' section. A red arrow points to the 'Policy Summary' section, and a red box with text points to it: 'Under the Policy Summary Menu you will now see a Policy Number.' The main content area shows a 'Transaction History' table with columns: Term-Seq Number, Transaction, Description, Effective, Written Premium, In Force Premium, User ID, and Entry Date/Time. The table contains one row: 1-1, New Business, New Business, 10/31/2016, 1308.00, 1308.00, 001000, 11/10/2016 19:04:38 EST. Below the table is a 'Policy Summary' section with fields: Policy Number (FDW0000154-01), Insured (John Doe), Inception (10/31/2016), Product (Combination Dwelling), Sub Type (MDW3), Term Effective (10/31/2016), Sequence (1-1), Transaction Status (Active), Transaction Effective (10/31/2016), In Force Premium (\$1,308.00), and In Force Premium (Inc Taxes & Fees) (\$1,317.00).

**\*\*In the Policy File you can see Dec Pages, Quotes, App, Receipts, MSB etc.**

## 5. Report a Loss

Enter Policy # (FDW###) into Search

A small dialog box titled "Search" with a text input field and a "Search" button. There is also a checkbox labeled "Open New Window".

| Search                                |                                          |
|---------------------------------------|------------------------------------------|
| <input type="text"/>                  |                                          |
| <input type="button" value="Search"/> | <input type="checkbox"/> Open New Window |

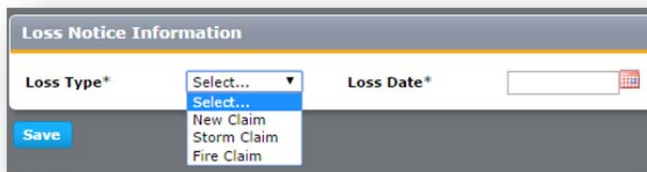
Click **Search**

Select **Report a Loss** from the Actions menu

A vertical menu titled "Actions" with three options: "Process Change", "Report a Loss", and "Make Payment".

| Actions        |
|----------------|
| Process Change |
| Report a Loss  |
| Make Payment   |

Enter required information (marked by an asterisks\*)

A form titled "Loss Notice Information" with two required fields: "Loss Type\*" and "Loss Date\*". The "Loss Type\*" field has a dropdown menu with options: "Select...", "Select...", "New Claim", "Storm Claim", and "Fire Claim". There is a "Save" button and a calendar icon next to the "Loss Date\*" field.

| Loss Notice Information                                                                                            |                      |
|--------------------------------------------------------------------------------------------------------------------|----------------------|
| Loss Type*                                                                                                         | Loss Date*           |
| <div><div>Select...</div><div>Select...</div><div>New Claim</div><div>Storm Claim</div><div>Fire Claim</div></div> | <input type="text"/> |
| <input type="button" value="Save"/>                                                                                |                      |

Click **Save**.

Enter required information (marked by an asterisks\*)

The screenshot displays the Franklin Mutual Insurance Company (FMI) Partner Platform ART User Guide for AGENTS. The interface includes a top navigation bar with links for Home, Quote/Policy, Support, Admin, and Sign Out. A breadcrumb trail shows the user is in the Notice section, with links for Claimants and Subrogation. A Search bar is located on the left, and a 'Return to Policy' link is in the top right. The main form is titled 'Loss Notice Information' and contains several sections: 'Loss Notice Summary' on the left, 'Loss Notice Information' in the center, 'Insured Contact Information' below it, and 'Property Information' at the bottom. The 'Loss Notice Summary' section lists details such as Claim Number (LN-0000106), Policy Number (FDW0000179), Product Name (Combination Dwelling), Insured Name (John D. Doe), Inception Date (11/29/2016), Expiration Date (11/29/2017), Agent Name (Gansfuss Agency), Claim Status (In Process), Loss Date (11/30/2016), and Claim State (New Jersey). The 'Loss Notice Information' section includes fields for Loss Date\*, Reported Date\*, Coverage Trigger\* (Occurrence), Reported By\*, Loss Cause\* (a dropdown menu), Short Description\*, Detailed Description\*, Authority Contacted\*, Case Number, and Comments. The 'Insured Contact Information' section includes Mailing Address, Care of c/o, Address\*, City\*, State\* Zip\* (Vernon, New Jersey, 07462-3149), Contact (Primary Phone, Email, Best Way to Contact, Secondary Contact), and Secondary Phone (Fax Number, Best Time to Contact, Secondary Contact Phone). The 'Property Information' section includes Property\* (Primary Dwelling), Loss Location, Address\*, City\*, State\* Zip\* (Vernon, New Jersey, 07462-3149), and Insured Property Damaged?\*. A 'Save' button is located at the bottom left of the form.

Click Save

Issues Tab will pop up

The screenshot shows the 'Issues' tab in the Franklin Mutual Insurance Company Partner Platform ART User Guide for AGENTS. It features a warning message: 'This loss notice is incomplete until you click the Complete action followed by the Submit button'. The message is displayed in a yellow box with a warning icon (a triangle with an exclamation mark) on the left.

Select **Complete** from the Actions menu

The screenshot shows the 'Actions' menu in the Franklin Mutual Insurance Company Partner Platform ART User Guide for AGENTS. The menu is a vertical list of buttons: Save, Complete, New Claimant, View Policy, and View Producer. The 'Complete' button is highlighted, indicating it is the selected action.

Click Submit

Issues

☒ Insufficient Authority to Process Claim

Closeout

Risk

Loss Cause

Description

Primary Dwelling

Ice and Snow

snow caused roof to cave in

Output Pending

| Include    | Modified | Document | Recipient | Name | Forms | Delivery Method | Destination |
|------------|----------|----------|-----------|------|-------|-----------------|-------------|
| Empty List |          |          |           |      |       |                 |             |

Submission Comments

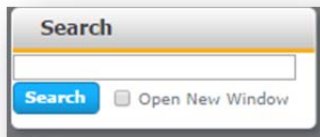
Submission Comments

Submit

Make Changes

## 6. Make a Payment

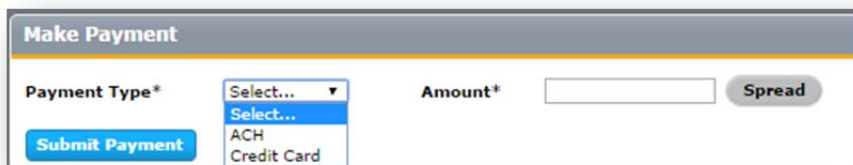
From the Home page, enter the policy number into the Search field and select Search.

A search form with a title bar labeled "Search". Below the title bar is a text input field. To the left of the input field is a blue button labeled "Search". To the right of the input field is a checkbox labeled "Open New Window".

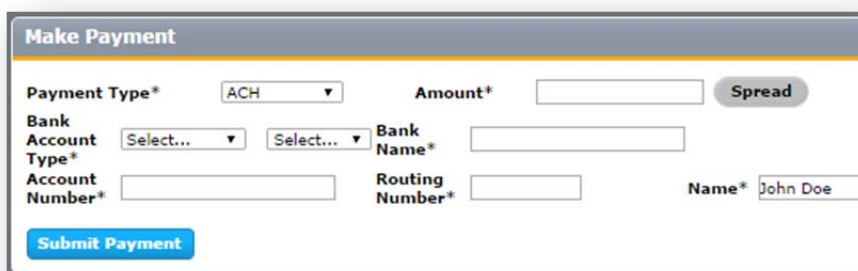
From the Actions Menu, select **Make a Payment**.

A vertical menu titled "Actions". It contains four items: "Process Change", "Report a Loss", and "Make Payment". The "Make Payment" item is highlighted with a blue background.

Select Payment Type and Amount

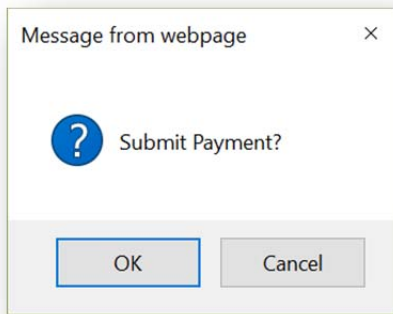
A form titled "Make Payment". It has a "Payment Type\*" dropdown menu with options "Select...", "Select...", "ACH", and "Credit Card". To the right of the dropdown is an "Amount\*" text input field. Below the dropdown is a blue "Submit Payment" button. To the right of the "Amount\*" field is a "Spread" button.

If **ACH** enter required information (marked by an asterisks\*)

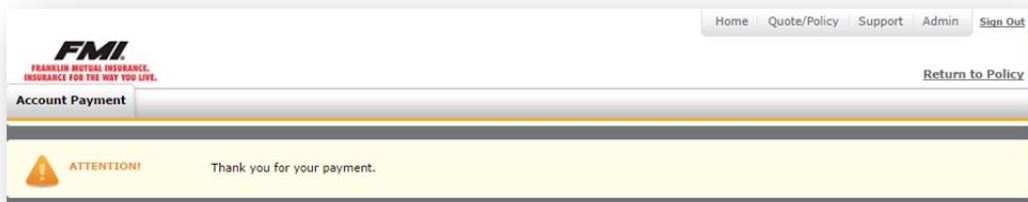
A form titled "Make Payment" with "ACH" selected in the "Payment Type\*" dropdown. It includes fields for "Bank Account Type\*" (dropdown), "Bank Account Number\*" (text input), "Bank Name\*" (text input), "Routing Number\*" (text input), and "Name\*" (text input with "John Doe" entered). There is also an "Amount\*" text input field and a "Spread" button. A blue "Submit Payment" button is at the bottom left.

Click **Submit Payment**

Click **OK**



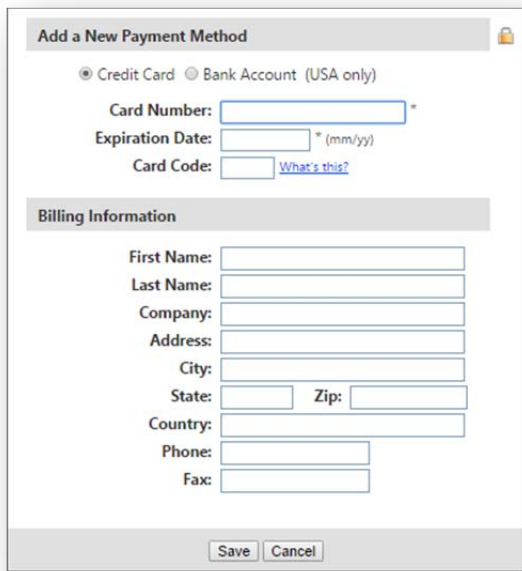
A separate window will appear showing a PDF copy of the receipt. The **Attention!** Message will show that Payment was received.



If **Credit Card** enter required information (marked by an asterisks\*)

A screenshot of the "Make Payment" form on the FMI website. The form has a title bar "Make Payment". Below the title bar, there are three main sections: "Payment Type\*" with a dropdown menu set to "Credit Card", "Amount\*" with an empty text input field, and "Credit Card Number\*" with an empty text input field. To the right of the "Amount" field is a "Spread" button. To the right of the "Credit Card Number" field is an "Enter Credit Card Details" button. At the bottom left of the form is a blue "Submit Payment" button.

## Hit Enter Credit Card Details

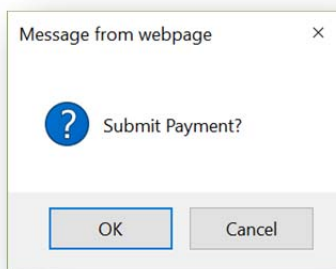


The screenshot shows a web form titled "Add a New Payment Method" with a lock icon. It has two radio buttons: "Credit Card" (selected) and "Bank Account (USA only)". Below are input fields for "Card Number:" (with an asterisk), "Expiration Date:" (with a hint "(mm/yy)" and an asterisk), and "Card Code:" (with a link "What's this?"). A section titled "Billing Information" contains fields for "First Name:", "Last Name:", "Company:", "Address:", "City:", "State:", "Zip:", "Country:", "Phone:", and "Fax:". At the bottom are "Save" and "Cancel" buttons.

Enter CC and Billing information

Click **Save**

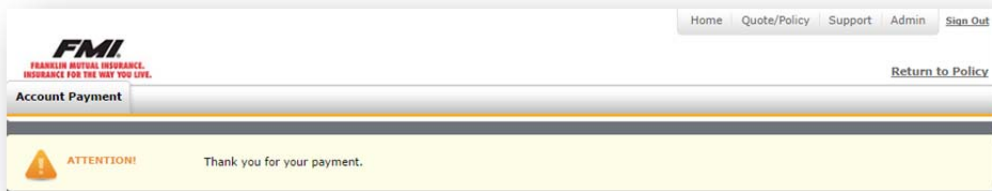
Click **Submit Payment**



The screenshot shows a small dialog box titled "Message from webpage" with a close button (X). It contains a blue question mark icon and the text "Submit Payment?". At the bottom are "OK" and "Cancel" buttons.

Click **OK**

A separate window will appear showing a PDF copy of the receipt. The **Attention!** Message will show that Payment was received.

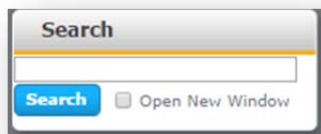


The screenshot shows the top of the Franklin Mutual Insurance Company website. The header includes the FMI logo and tagline "INSURANCE FOR THE WAY YOU LIVE.", and navigation links: Home, Quote/Policy, Support, Admin, Sign Out, and Return to Policy. Below the header is a section titled "Account Payment". A yellow banner with an attention icon and the text "ATTENTION! Thank you for your payment." is displayed.

## 7. Process Change

*This function allows the user to process endorsement or renewal changes on the policy.*

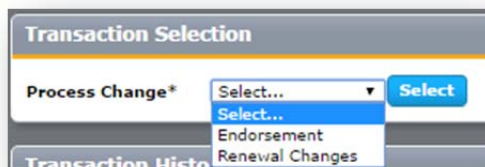
From the Home page, enter the policy number into the Search field and select Search.

A small dialog box titled "Search" with a text input field and a "Search" button. There is also a checkbox labeled "Open New Window".

Select Process Change from the Actions Menu

A vertical menu titled "Actions" with three options: "Process Change", "Report a Loss", and "Make Payment".

Select the Change type from the Process Change drop down list and click **Select**.

A dialog box titled "Transaction Selection" with a "Process Change\*" dropdown menu showing "Select...", "Endorsement", and "Renewal Changes". There is a "Select" button and a "Transaction History" link.

Enter all required information (marked by an asterisks\*)

A dialog box titled "Transaction Selection" with form fields for "Process Change\*" (set to "Endorsement"), "Effective Date\*" (with a calendar icon), "Description\*" (set to "Endorsement"), and "Additional Declaration Text" (a large text area). There are "Start" and "Cancel" buttons at the bottom.

Select **Start**

Go to screen needed and make change

Save

Finalize transaction and Preview Output (*a separate page will pop up*)

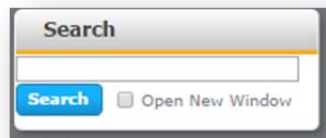
Endorse Policy

Dec page will generate.

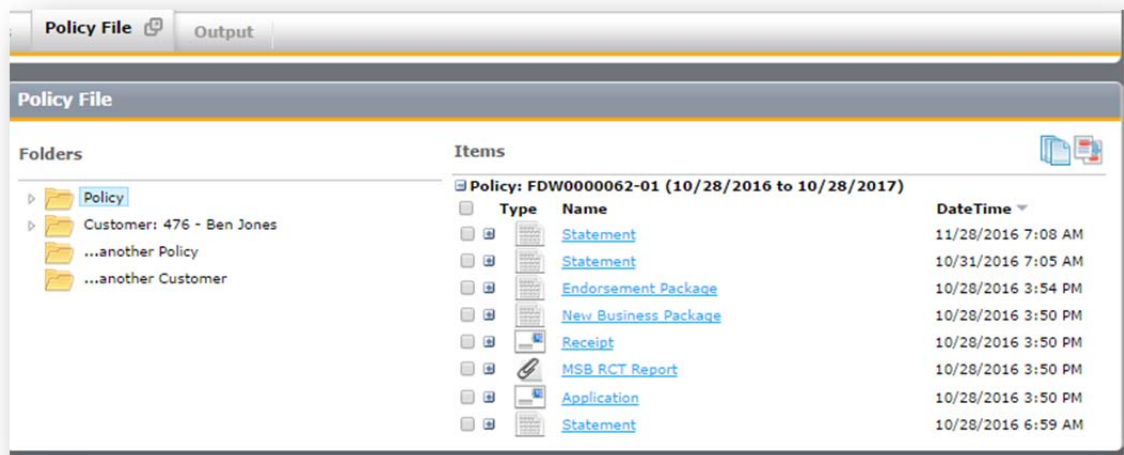
## 8. Attachments

### A. View Attachments

From the Home page, enter the policy number into the Search field and select Search.



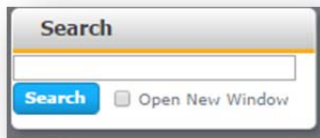
Select the **Policy File** Tab



Click on the hyperlink to view attachment

## B. Add Attachments

From the Home page, enter the policy number into the Search field and select **Search**.

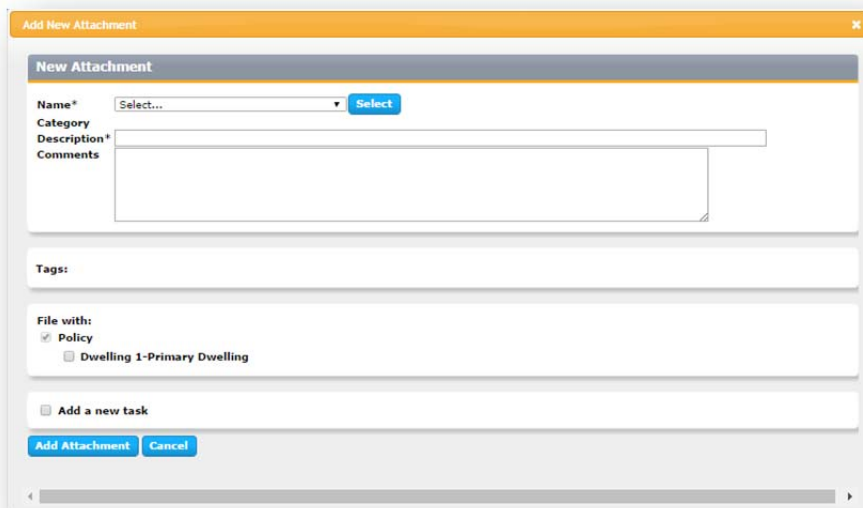
A small dialog box titled "Search" with a text input field and a blue "Search" button. There is also a checkbox labeled "Open New Window".

Select the **Policy File** Tab

Select **Add Attachment** from the Actions Menu

A vertical menu titled "Actions" with four options: "Add Attachment", "View Policy Notes", "Report a Loss", and "Make Payment".

Enter all required information (marked by an asterisks\*)

A dialog box titled "Add New Attachment" with a "New Attachment" section. It contains fields for "Name\*" (a dropdown menu), "Category", "Description\*" (a text area), and "Comments" (a text area). Below these are "Tags:", "File with:" (with checkboxes for "Policy" and "Dwelling 1-Primary Dwelling"), and "Add a new task". At the bottom are "Add Attachment" and "Cancel" buttons.

Select Add Attachment

Select Add Files (once file load you are given the option to delete file).

Add New Attachment

**ATTENTION!**

Attachment is required. Use the 'Add Files' button to attach files.

New Attachment

Name\* Alarm credit  
Category General  
Description\* Alarm Credit  
Comments

Add Files

Preview not available.

TEST.docx

11.49 KB

DELETE

Tags:

☐ Correspondence
☐ Miscellaneous
☐ Records

File with:

☒ Policy
☐ Dwelling 1-Primary Dwelling

Tasks created with this Attachment:

☒ Unable to add Alarm Credit Update

☐ Add a new task

Add Attachment Cancel

Select Add Attachment

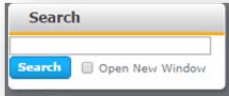
You will be directed back to the Policy File Tab where you can see the new attachment just added.

| Policy File                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                    |      |      |          |  |              |                    |  |           |                    |  |           |                    |  |                     |                    |  |                      |                    |  |         |                    |  |                |                    |  |             |                    |  |           |                    |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|------|------|----------|--|--------------|--------------------|--|-----------|--------------------|--|-----------|--------------------|--|---------------------|--------------------|--|----------------------|--------------------|--|---------|--------------------|--|----------------|--------------------|--|-------------|--------------------|--|-----------|--------------------|
| Policy File                                                                                                                                         | Claims                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Billing            |      |      |          |  |              |                    |  |           |                    |  |           |                    |  |                     |                    |  |                      |                    |  |         |                    |  |                |                    |  |             |                    |  |           |                    |
| Policy File                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                    |      |      |          |  |              |                    |  |           |                    |  |           |                    |  |                     |                    |  |                      |                    |  |         |                    |  |                |                    |  |             |                    |  |           |                    |
| Folders                                                                                                                                             | Items                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                    |      |      |          |  |              |                    |  |           |                    |  |           |                    |  |                     |                    |  |                      |                    |  |         |                    |  |                |                    |  |             |                    |  |           |                    |
| <ul style="list-style-type: none"> <li>Policy</li> <li>Customer: 476 - Ben Jones</li> <li>...another Policy</li> <li>...another Customer</li> </ul> | <div>Policy: FDW0000062-01 (10/28/2016 to 10/28/2017)</div> <table> <thead> <tr> <th>Type</th><th>Name</th><th>DateTime</th></tr> </thead> <tbody> <tr> <td></td><td>Alarm Credit</td><td>11/30/2016 2:55 AM</td></tr> <tr> <td></td><td>Statement</td><td>11/28/2016 7:08 AM</td></tr> <tr> <td></td><td>Statement</td><td>10/31/2016 7:05 AM</td></tr> <tr> <td></td><td>Endorsement Package</td><td>10/28/2016 3:54 PM</td></tr> <tr> <td></td><td>New Business Package</td><td>10/28/2016 3:50 PM</td></tr> <tr> <td></td><td>Receipt</td><td>10/28/2016 3:50 PM</td></tr> <tr> <td></td><td>MSB RCT Report</td><td>10/28/2016 3:50 PM</td></tr> <tr> <td></td><td>Application</td><td>10/28/2016 3:50 PM</td></tr> <tr> <td></td><td>Statement</td><td>10/28/2016 6:59 AM</td></tr> </tbody> </table> |                    | Type | Name | DateTime |  | Alarm Credit | 11/30/2016 2:55 AM |  | Statement | 11/28/2016 7:08 AM |  | Statement | 10/31/2016 7:05 AM |  | Endorsement Package | 10/28/2016 3:54 PM |  | New Business Package | 10/28/2016 3:50 PM |  | Receipt | 10/28/2016 3:50 PM |  | MSB RCT Report | 10/28/2016 3:50 PM |  | Application | 10/28/2016 3:50 PM |  | Statement | 10/28/2016 6:59 AM |
| Type                                                                                                                                                | Name                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | DateTime           |      |      |          |  |              |                    |  |           |                    |  |           |                    |  |                     |                    |  |                      |                    |  |         |                    |  |                |                    |  |             |                    |  |           |                    |
|                                                                                                                                                     | Alarm Credit                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | 11/30/2016 2:55 AM |      |      |          |  |              |                    |  |           |                    |  |           |                    |  |                     |                    |  |                      |                    |  |         |                    |  |                |                    |  |             |                    |  |           |                    |
|                                                                                                                                                     | Statement                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | 11/28/2016 7:08 AM |      |      |          |  |              |                    |  |           |                    |  |           |                    |  |                     |                    |  |                      |                    |  |         |                    |  |                |                    |  |             |                    |  |           |                    |
|                                                                                                                                                     | Statement                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | 10/31/2016 7:05 AM |      |      |          |  |              |                    |  |           |                    |  |           |                    |  |                     |                    |  |                      |                    |  |         |                    |  |                |                    |  |             |                    |  |           |                    |
|                                                                                                                                                     | Endorsement Package                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | 10/28/2016 3:54 PM |      |      |          |  |              |                    |  |           |                    |  |           |                    |  |                     |                    |  |                      |                    |  |         |                    |  |                |                    |  |             |                    |  |           |                    |
|                                                                                                                                                     | New Business Package                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | 10/28/2016 3:50 PM |      |      |          |  |              |                    |  |           |                    |  |           |                    |  |                     |                    |  |                      |                    |  |         |                    |  |                |                    |  |             |                    |  |           |                    |
|                                                                                                                                                     | Receipt                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | 10/28/2016 3:50 PM |      |      |          |  |              |                    |  |           |                    |  |           |                    |  |                     |                    |  |                      |                    |  |         |                    |  |                |                    |  |             |                    |  |           |                    |
|                                                                                                                                                     | MSB RCT Report                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | 10/28/2016 3:50 PM |      |      |          |  |              |                    |  |           |                    |  |           |                    |  |                     |                    |  |                      |                    |  |         |                    |  |                |                    |  |             |                    |  |           |                    |
|                                                                                                                                                     | Application                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | 10/28/2016 3:50 PM |      |      |          |  |              |                    |  |           |                    |  |           |                    |  |                     |                    |  |                      |                    |  |         |                    |  |                |                    |  |             |                    |  |           |                    |
|                                                                                                                                                     | Statement                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | 10/28/2016 6:59 AM |      |      |          |  |              |                    |  |           |                    |  |           |                    |  |                     |                    |  |                      |                    |  |         |                    |  |                |                    |  |             |                    |  |           |                    |

### C. Request to Cancel via Attachment

**Note:** You may also send a request to cancel a policy via E-Mail Listener. Email request and all pertinent documents to [fmi@spi-attachments.com](mailto:fmi@spi-attachments.com)

From the Home page, enter the policy number into the Search field and select **Search**.

A small search interface with a text input field labeled 'Search' and a blue 'Search' button. Below the button is a checkbox labeled 'Open New Window'.

Select the **Policy File** Tab

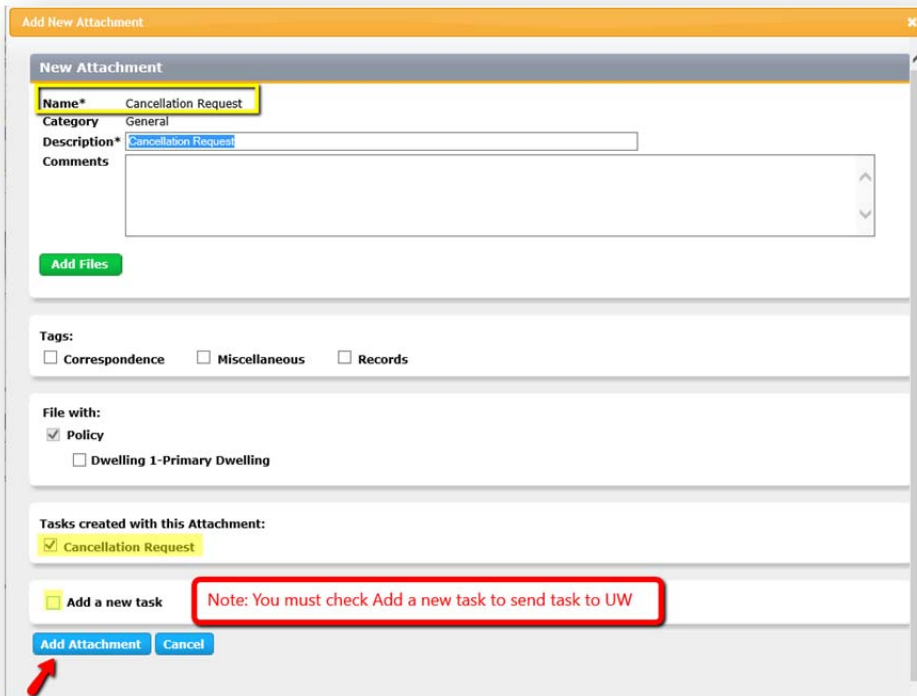
Select **Add Attachment** from the Actions Menu

A vertical menu titled 'Actions' with four options: 'Add Attachment', 'View Policy Notes', 'Report a Loss', and 'Make Payment'.

Select Cancellation Request. Enter all required information (marked by an asterisks\*)

Click Add Files

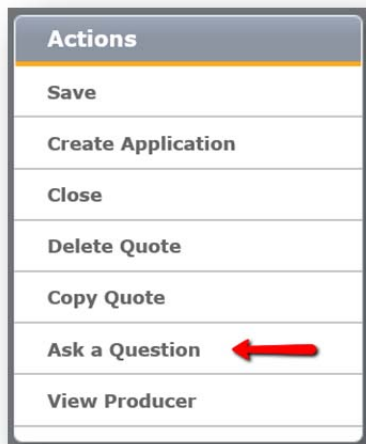
Click Add Attachment.

A screenshot of the 'Add New Attachment' form. The form has a title bar 'Add New Attachment' and a 'New Attachment' section. Fields include 'Name\*' (filled with 'Cancellation Request'), 'Category' (filled with 'General'), 'Description\*' (filled with 'Cancellation Request'), and 'Comments'. Below these is an 'Add Files' button. A 'Tags' section has checkboxes for 'Correspondence', 'Miscellaneous', and 'Records'. A 'File with:' section has checkboxes for 'Policy' (checked) and 'Dwelling 1-Primary Dwelling'. A 'Tasks created with this Attachment:' section has a checked checkbox for 'Cancellation Request'. At the bottom, there is an 'Add a new task' checkbox and a red box containing the text 'Note: You must check Add a new task to send task to UW'. At the very bottom are 'Add Attachment' and 'Cancel' buttons. A red arrow points to the 'Add Attachment' button.

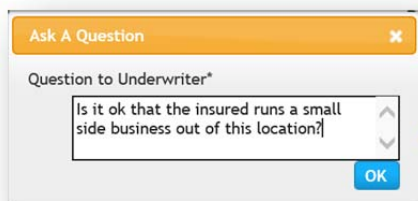
## 9. Ask a Question

(This feature will allow you to send a question directly to your Underwriter)

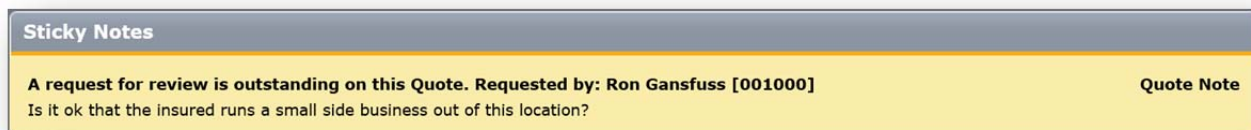
From the Action Tile **click** on Ask a Question



The below box will appear where you can type a question that will be sent to your Underwriter. **Click** OK to send.



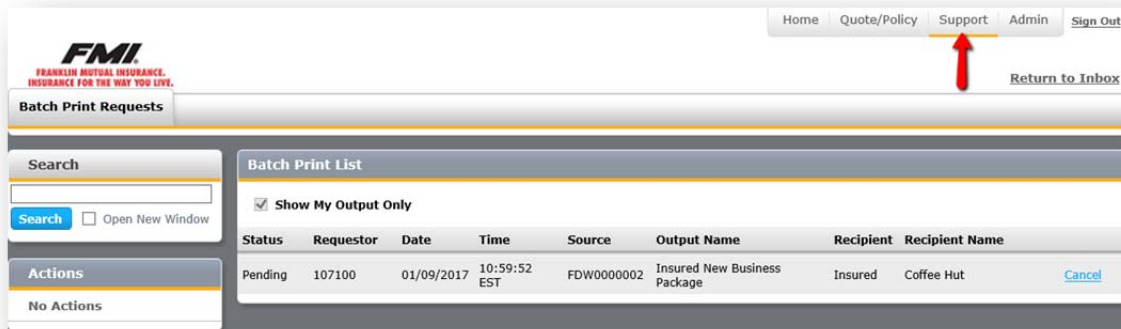
Once sent you will see a sticky note indicating that there is a note for the Underwriter to review. This note will be visible until the Underwriter responds and once the response is read the sticky note will disappear.



## 10. Batch Print Request

(This feature will allow you to view what is waiting to be printed)

From the Home Screen **Click** on Support



**FMI**  
FRANKLIN MUTUAL INSURANCE  
INSURANCE FOR THE WAY YOU LIVE.

Home Quote/Policy **Support** Admin Sign Out

[Return to Inbox](#)

**Batch Print Requests**

Search

[Search](#) ☐ Open New Window

**Actions**

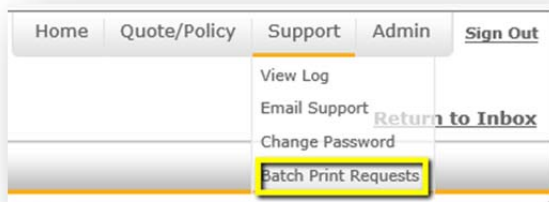
No Actions

**Batch Print List**

☒ Show My Output Only

| Status  | Requestor | Date       | Time         | Source     | Output Name                  | Recipient | Recipient Name |                        |
|---------|-----------|------------|--------------|------------|------------------------------|-----------|----------------|------------------------|
| Pending | 107100    | 01/09/2017 | 10:59:52 EST | FDW0000002 | Insured New Business Package | Insured   | Coffee Hut     | <a href="#">Cancel</a> |

**Click** on Batch Print Request



Home Quote/Policy **Support** Admin Sign Out

View Log

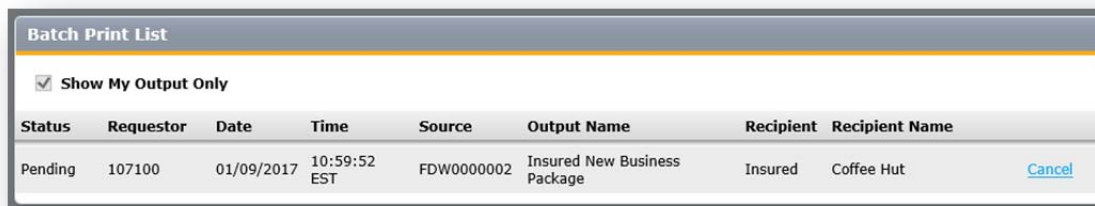
Email Support [Return to Inbox](#)

Change Password

**Batch Print Requests**

Batch Print List will appear

*Note: This will list everything that is set to print the following day for the agency).*



**Batch Print List**

☒ Show My Output Only

| Status  | Requestor | Date       | Time         | Source     | Output Name                  | Recipient | Recipient Name |                        |
|---------|-----------|------------|--------------|------------|------------------------------|-----------|----------------|------------------------|
| Pending | 107100    | 01/09/2017 | 10:59:52 EST | FDW0000002 | Insured New Business Package | Insured   | Coffee Hut     | <a href="#">Cancel</a> |

**Cancel Batch Print Request**

Click on Cancel on the bottom right

| Batch Print List                                        |           |            |              |            |                              |           |                |
|---------------------------------------------------------|-----------|------------|--------------|------------|------------------------------|-----------|----------------|
| <input checked="" type="checkbox"/> Show My Output Only |           |            |              |            |                              |           |                |
| Status                                                  | Requestor | Date       | Time         | Source     | Output Name                  | Recipient | Recipient Name |
| Pending                                                 | 107100    | 01/09/2017 | 10:59:52 EST | FDW0000002 | Insured New Business Package | Insured   | Coffee Hut     |

Status will change from pending to cancelled

| Batch Print List                                        |           |            |              |            |                              |           |                |
|---------------------------------------------------------|-----------|------------|--------------|------------|------------------------------|-----------|----------------|
| <input checked="" type="checkbox"/> Show My Output Only |           |            |              |            |                              |           |                |
| Status                                                  | Requestor | Date       | Time         | Source     | Output Name                  | Recipient | Recipient Name |
| Cancelled                                               | 107100    | 01/09/2017 | 10:59:52 EST | FDW0000002 | Insured New Business Package | Insured   | Coffee Hut     |

### Un-cancel Batch Print Request

If you would like to resume Batch Printing Click Un-cancel

| Batch Print List                                        |           |            |              |            |                              |           |                |
|---------------------------------------------------------|-----------|------------|--------------|------------|------------------------------|-----------|----------------|
| <input checked="" type="checkbox"/> Show My Output Only |           |            |              |            |                              |           |                |
| Status                                                  | Requestor | Date       | Time         | Source     | Output Name                  | Recipient | Recipient Name |
| Cancelled                                               | 107100    | 01/09/2017 | 10:59:52 EST | FDW0000002 | Insured New Business Package | Insured   | Coffee Hut     |

Status will change to Pending

| Batch Print List                                        |           |            |              |            |                              |           |                |
|---------------------------------------------------------|-----------|------------|--------------|------------|------------------------------|-----------|----------------|
| <input checked="" type="checkbox"/> Show My Output Only |           |            |              |            |                              |           |                |
| Status                                                  | Requestor | Date       | Time         | Source     | Output Name                  | Recipient | Recipient Name |
| Pending                                                 | 107100    | 01/09/2017 | 10:59:52 EST | FDW0000002 | Insured New Business Package | Insured   | Coffee Hut     |

When you are done **click** Return to Inbox

|                                                                                                                                                                      |  |  |  |                                                                                                                          |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|--|--------------------------------------------------------------------------------------------------------------------------|
| <br><small>FRANKLIN MUTUAL INSURANCE,<br/>INSURANCE FOR THE WAY YOU LIVE.</small> |  |  |  | <a href="#">Home</a> <a href="#">Quote/Policy</a> <a href="#">Support</a> <a href="#">Admin</a> <a href="#">Sign Out</a> |
| <b>Batch Print Requests</b>                                                                                                                                          |  |  |  | <a href="#">Return to Inbox</a>                                                                                          |