



Wisconsin Mutual *Insurance Company*

Homeowner Quoting Instructions

There are 3 main options in the Homeowner Quoting program. You may complete a new quote, lookup a previous quote, and copy in an existing policy. Below you will find a general overview of the homeowner quoting, plus instructions on how to complete each step. Depending on what processing needs to be completed, the options within the steps below do not necessarily need to be completed in that specific order.

The Homeowner quoting button is located on Agents Access @ http://wiins.com/agent_access.htm, towards the bottom right hand corner of the page. The button is labeled Homeowner under the Quoting heading.

From all screens you will have navigational buttons that allow you to move forward, backward, and return to main level navigation. You will not need to use the browsers forward, backward, or refresh buttons. Certain buttons are radio buttons. These are small round circles that you may select. These buttons include all change and delete options. The endorsement and scheduled property options on the dwelling processing screen are also radio buttons. The instructions below indicate which options are radio buttons.

Step 1: Choose Quote Option

There are three main options on the *Quote Main* section, New Quote, Lookup Previous Quote, and Copy Existing Policy. All of these will take you to the *Main Information* screen which includes Policy Type, Insureds Name and Address, Policy Term, Effective Date, and Rate Effective Date.

New Quote Option -

Enter all fields on the Main Information Screen
Select *Work with Dwellings*

Lookup Previous Quote -

Enter a portion of the Policyholders name
Select *Get List of Quotes*

Select a Quote (radio button)
Select *Edit Quote*

Enter all fields on the Main Information Screen
Select *Work with Dwellings*

Copy Existing Policy -

Enter Policy Number
Select *Copy Policy*

Edit Main Information Screen, if needed
Select *Work with Dwellings*

Or

Enter a portion of the Policyholders Name
Select *Copy Policy*

Select a Policy (radio button)
Select *Submit Policy Selection*

Edit Main Information Screen, if needed
Select *Work with Dwellings*

Step 2: Dwelling Processing

All dwelling processing will be done on the *Process Dwelling Selection* screen. From there you will have access to adding/changing/deleting dwellings, working endorsements and scheduled property. This screen only lists dwelling base premium and does not include endorsement or scheduled property premium.

Add a dwelling -

Select *Add Dwelling*

Enter all fields

Select *Submit Dwelling* - You will receive a confirmation message when the dwelling has been added.

Select *Return to Work with Dwellings*

Change a dwelling -

Select *Change* (radio button) and the corresponding dwelling (radio button)

Select *Submit Dwelling Selection*

Change dwelling fields - Some fields may not be changed once a dwelling is added.

Select *Submit Change Dwelling* - You will receive a confirmation message when the dwelling has been changed.

Select *Return to Work with Dwellings*

To quote a new Premier Elite Form 5 - from an existing Premier Form 3 policy.

You will need to make the following changes.

Change the Rate Effective Date to 01-01-05 - located on the Main Information screen

Change the App Type to Premier Elite - located on the change dwelling screen

Change the WML Form Type to WML-5 Elite - located on the change dwelling screen

Delete a dwelling -

Select *Delete* (radio button) and the corresponding dwelling (radio button)

Select *Submit Dwelling Selection*

Select *Delete Dwelling* - You will receive a confirmation message when the dwelling has been deleted.

Select *Return to Dwelling Selection*

Step 3: Endorsement Processing

All endorsement processing will be done on the *Process Endorsement Selection* screen. From there you will have access to adding/changing/deleting endorsements. This screen only lists endorsements for the specified dwelling. Default endorsements are added automatically.

Work with Endorsements -

Select *Endorsement* (radio button) and the corresponding dwelling (radio button)

Select *Submit Dwelling Selection*

Add an Endorsement -

Select *Add Endorsement*

Enter a portion of the Form Description of the Endorsement to be added

Select *List Endorsement*

Select an endorsement (radio button)

Select *Add Endorsement* - Some endorsements require a No Of field entry or Limit entry.

Select *Return to Work with Endorsements*

Step 3 continued on next page...

Change an Endorsement -

Select *Change* (radio button) and the corresponding endorsement (radio button)

Select *Submit Endorsement Selection* - Some endorsements do not have any options to change.

Change endorsement fields

Select *Submit Endorsement Change* - You will receive a confirmation message when the endorsement has been changed.

Select *Return to Work with Endorsements*

Delete an Endorsement -

Select *Delete* (radio button) and the corresponding endorsement (radio button)

Select *Submit Endorsement Selection*

Select *Delete Endorsement* - You will receive a confirmation message when the endorsement has been deleted.

Select *Return to Work with Endorsements*

Endorsement Processing Finished -

Select *Return to Dwelling Selection*

Step 4: Scheduled Property Processing

All scheduled property processing will be done on the *Process Scheduled Property Selection* screen. From there you will have access to add/change/delete Scheduled Property Classes and the Scheduled Property. Scheduled Property Classes must be added before the specific scheduled property can be added. Once a class has been added, you will need to work within the specific class on adding/changing/deleting scheduled property.

Work with Scheduled Property -

Select *Scheduled Property* (radio button) and the corresponding dwelling (radio button)

Select *Submit Dwelling Selection*

Add a Scheduled Property Class -

Select *Add Scheduled Property Class*

Select a Class (radio button)

Select *Add Scheduled Property Class*

Enter Scheduled Property fields

Select *Add Scheduled Property* - You will receive a confirmation message when the scheduled property class/scheduled property has been added.

Select *Return to Scheduled Property Selection* - This will return you to the specific class being worked on.

Scheduled Property Class Processing Finished -

Select *Return to Scheduled Property Class Selection*

Work with a Scheduled Property Class -

Select *Scheduled Property Class* (radio button)

Select *Submit Class Selection*

Step 4 continued on next page...

Add Scheduled Property -

Select *Add Scheduled Property*

Enter Scheduled Property fields

Select *Add Scheduled Property* - You will receive a confirmation message when the scheduled property has been added.

Select *Return to Scheduled Property Selection* - This will return you to the specific class being worked on.

Change Scheduled Property -

Select *Change* (radio button) and the corresponding Scheduled Property (radio button)

Select *Submit Scheduled Property Selection*

Change Scheduled Property fields

Select *Change Scheduled Property* - You will receive a confirmation message when the scheduled property has been changed.

Select *Return to Scheduled Property Selection* - This will return you to the specific class being worked on.

Delete Scheduled Property -

Select *Delete* (radio button) and the corresponding Scheduled Property (radio button)

Select *Submit Scheduled Property Selection*

Select *Delete Scheduled Property* - You will receive a confirmation message when the scheduled property has been deleted.

Select *Return to Scheduled Property Selection* - This will return you to the specific class being worked on.

Scheduled Property Processing Finished -

Select *Return to Dwelling Selection*

Step 5: Final Step: View Completed Quote -

This will open a separate browser window showing the final quote. It contains insured & agent information, policy type, term, effective date, total term premium, and complete dwelling, endorsement, and scheduled property information.

Select *Final Step: View Completed Quote*

Print Quote -

Select your browser's *Print* button

Or

Select *File* Menu

Select *Print* Option

Close the Window

Step 6: Return to Agent Access or Quote Main -

After you have completed the quote, you may complete another quote or return to Agent Access.

Complete another Quote -

Select *Return to Quote Main*

Return to Agent Access -

Select *Return to Agent Access*