

Burns & Wilcox has partnered with Appulate to make our quoting process easy for you, our valued agents! In this document, learn about who they are, what the benefits are, how to use it and how to set it up.

# Appulate Training

For Burns & Wilcox Agents

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### **Who is Appulate?**

Appulate is empowering agents! More than 28,000 agencies use Appulate's ProducerConnect™ to Increase efficiency by eliminating redundant keystrokes in the submission and quoting process. Agents use Appulate to move ACORD and other data from their management systems to the carriers they do business with AND they use Appulate to gain access to new markets, products and programs. Appulate is so confident in its ability to streamline the agent's workflow and help them grow that we give agents immediate access to ProducerConnect™ for zero cost.

### **Why we have partnered with Appulate?**

Burns & Wilcox has partnered with Appulate—streamlining the submission workflow process, and reducing the time associated with completing an application form. Appulate's outstanding level of service and advanced technology makes for a powerful combination and the perfect partnership for Burns & Wilcox.

### **What is in it for me?**

Submissions and quoting with Burns & Wilcox has never been easier than they are now with the help of Appulate. As an agent, you can upload your completed ACORD data from an ACORD PDF or your agency management system into our smart questionnaire in Appulate- no rekeying of ACORD data. For those that don't have access to ACORDs, you can start in Appulate and complete our smart questionnaire. An ACORD from will populate for your records!

Bottom line, this will save us both time in the submission process, meaning that you can don't have to spend a lot of your time on your submissions and we can get quotes turned around quicker, which we know enables you to be a better agent!

This is a FREE service for you to use to submit to the **Burns & Wilcox Personal Umbrella Program**.

### **Agent Benefits**

- Works with any agency management system
- Non-management system users have access to ACORDs
- Features available for easy gathering of information from insured
- Electronic signature- for agent and insured
- Reduces data entry time
- Stores the insured file with supporting documents for easy access and renewal submissions
- ELearning is available for easy training

### **How to start a submission (2 options):**

#### **If you have a completed ACORD form:**

1. Go to your completed ACORD form (ACORD PDF or in your management system).
2. Uplink your ACORD form, meaning 'Print' the ACORD form but instead of choosing your office printer, for example, choose the Appulate Uplink printer option.
3. Print.
4. Confirm your Appulate credentials.

Appulate will then open and an insured file and Line of Business will have been created for you. All of your ACORD data gets plugged right into our smart questionnaire powered by Appulate so you won't have to rekey the data.

#### **If you don't have a completed ACORD form:**

1. Navigate to [Appulate.com/signin](https://Appulate.com/signin) and sign in
2. Click on "Add New" at the top left-hand side of the page

3. Enter the Insured information and click the Continue button
4. Enter the Quote information and click the Continue button

### How to complete a submission

5. Optional\*- Listed under our name you will see our list of appointed markets, these are referred to as submarkets. If you wish, you may unselect markets that you don't want us to submit to or that you happen to know will decline. This will remove those market's questions from our Smart Questionnaire.
6. Review the instant Estimated Premiums for a quick indication. These are based on public rate filings and are not bindable quotes. You must submit for a bindable quote.
7. Hover over the letter indication to help guide you through the submission process. If there are any questions that are missing and required they will be listed. Those questions are clickable and will take you directly to where they need to be answered in the smart questionnaire.
8. Fulfill the requirements by answering any missing and required questions that have a red asterisk and are listed in the letter indication next to our name.
9. Upload any documents that should be included in the submission.
  - Loss Runs
    - Navigate to the Loss Runs tab (far left-hand side of the screen).
    - If the carrier's name is not entered, click on the Edit Insurance History button and type the years and carrier name that you will be uploading loss runs for and click Save.
    - Click on the paper clip icon on the far right to browse your computer and upload the loss runs or drag and drop the loss runs.
  - Additional documents
    - Navigate to the Docs tab (far left-hand side of the screen).
    - Drag and drop documents or click on Select to browse your computer and upload.
    - Choose the Type from the dropdown menu and click Save
10. Once you have fulfilled the requirements, you will see a green letter indication at the top of the page next to our name which indicates that you have fulfilled the requirements and are able to click on the Submit button (the blue arrow under the Action column on the top right-hand side of the screen).

Once you submit, the status will change to say Submitted. Your quote will be returned immediately via Appulate. The quote will appear in the Q&A screen (same page you did your submission from). If you have any questions on the Smart Questionnaire or the status of a submission, please contact Burns & Wilcox representative, Jeff Leone, Underwriting Manager, 248.539.6013, [jeleone@burns-wilcox.com](mailto:jeleone@burns-wilcox.com).

### Post Submission

A quote will be prepared and uploaded to Appulate. You will receive email notification.

**Sharing the quote with your insured-** You may share the quote with your insured right from within Appulate by clicking on the Email (envelope) icon under action (upper right-hand side of the screen, in line with the quote). You may also extract the quote from Appulate by clicking on the quote.

**Changing the Status-** Once you receive a quote, the status reads, Quote Prepared. You may update the status by clicking on the current status (a dropdown menu will appear) and choosing the appropriate status.

**Request to Bind-** Click on the Request to Bind icon under action, in line with the quote. Follow the prompts and required actions to move forward. The status will change accordingly.

If/when it is bound, you will receive email notification, the status will be changed accordingly (to Bound), and the quoting functionality will be hidden. Policy documents may be uploaded in the

appropriate tab at the far left of your screen.

**Re-submission-** If any updates need to be made post submission (before binding) they may be made in the Smart Questionnaire. Your representative will be notified and you may send them a separate message on this as well. There isn't a need (or a way) to resubmit.

**Re-marketing/Updating a file for submission with a new effective date-** All data is securely stored in Appulate for easy re-marketing next year.

**Using Uplink™-** You may do this by 'printing' your updated ACORD to the Appulate Uplink printer option and following the prompts (as long as it has the same insured name and FEIN) the existing file will be updated with new effective and expiration date (the outdated quote is still stored and can be accessed, it is not replaced). You may update any additional information, fulfill requirements and submit with minimal effort and time!

**Starting in Appulate-** The very first page in Appulate that you get logged into is called the Insured- All Insured, screen (where all your insured files are listed). You can navigate to it by clicking on the main Insured tab at the top of the page and then selecting All Insured option. Once you locate the insured file you would like to work on, click on the arrow on the left-hand side of the insured and choose the line of business. Then you will be taken to the Q&A screen. A few tabs below on the left, click on the Options tab. Then select Renew.

## Setup

**If you are an existing Appulate user,** Burns & Wilcox was added to your list of selected markets.

**If you have not used Appulate before,** for your convenience an account has already been for you. To log in, go to Appulate.com and click on the "Forgot Password?" link to create credentials.

**Download Uplink™-** Uplink™ is the tool that enables you to bridge ACORD data from your management system or ACORD PDF into Appulate so that you don't have to rekey the data. Uplink™ must be downloaded on to your computer first. The download is simple and takes less than a minute.

Once you are logged in, go to Tools and Appulate Uplink. Click on the dropdown menu to choose your agency management system. Click on the link to install. Once you have installed it successfully, it will show up as one of your printer options (i.e. along with your office and home printer).

## Help

**Please contact Burns & Wilcox representative,** Jeff Leone, Underwriting Manager, 248.539.6013, [jeleone@burns-wilcox.com](mailto:jeleone@burns-wilcox.com) for more information, any questions, assistance with a submission or for a status update on a quote.

**eLearning** is a wonderful resource for agents learning how to use Appulate. If you are new to Appulate, you may want to start from the beginning and work through all of the lessons in order. It will take about 40 minutes for in depth training. You are welcome to skip through the lessons and navigate at your own pace, across any device.

You can access the eLearning through the help section once you are signed into Appulate by clicking on the question mark at the very top right-hand side of your screen and navigating to Training. Click on Start eLearning Course and follow the prompts.

You may email [support@appulate.com](mailto:support@appulate.com) for any **technical issues**.

## FAQ

### **Q: How much does the service cost?**

A: We have partnered with Appulate, therefore it is absolutely free for our agents to use Appulate to submit to Burns & Wilcox Personal Umbrella Program.

### **Q: How can I reset my Appulate credentials?**

A: Go to [appulate.com/signin](https://appulate.com/signin) and click on the “Forgot password?” link. You will be asked to enter your email address and will receive an email to create a new password.

### **Q: Who is the admin on my account?**

A: An Appulate Admin has control of settings, is responsible for adding users and has other account privileges. If an Appulate account was created for your agency, the first person added to the account was named as the admin. If your agency created an account, the person to create the account is an admin.

If you do not know the admin and need to be added as a user you may go through the account setup process and the system will alert your admin to add you as a user.

There can be more than one admin and admins can be changed. The admin has the right to change the user role for any user.

### **Q: Can I add and deactivate users?**

A: Yes, an admin can add and deactivate users in Appulate under “Setup” and “Users”.

### **Q: I am already using Appulate for another market. How do I access all of my markets?**

A: You must be logged into Appulate.com and not a company specific URL (i.e. don't log into [burnsandwilcox.appulate.com](https://burnsandwilcox.appulate.com)).

Each agency has one Appulate account and from that account, you may work with all of your markets. To add or remove markets go to the “Markets” tab at the top of the page. Under “Selected” are all of the markets selected for your agency to work with in Appulate. You may remove a market simply by clicking on the unselect button on the far-right of their name. To add a market, go to the “Available” tab, locate the market and click the plus sign or select icon.

The list of selected markets applies to your entire account. Meaning that if you add a market, other users tied to your account will have it as their selected market as well.

### **Q: Why is Burns & Wilcox not showing up as a market I can submit to?**

A: It may have been removed. For information on how to add it, see answer above.

### **Q: Why is the Uplink™ download not working?**

A: Microsoft Outlook should be closed during the installation process of Uplink.

Users should have admin capabilities on the pc where the installation is taking place. If not, contact someone within your organization who has admin privilege.

If you run into any issues, please contact, [support@appulate.com](mailto:support@appulate.com).

### **Q: Why is it not taking me directly into Appulate after I Uplink™ an ACORD?**

A: Appulate has 2 Uplink™ setting options. Appulate UI will take you into Appulate, which is the best setting when using Appulate for Burns & Wilcox since our portal is within Appulate. Carrier Direct will bypass Appulate's interface and take you directly into your markets portal (best setting for markets whose portal lives outside of Appulate. This is a setting that can be changed by your account admin in Appulate under Setup, Settings, Uplink™ Settings, Uplink™ Redirector.