



Agency Quoting Center Guide

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Overview

Beacon Mutual's new Agency Quoting Center system now allows you the ability to process quotes more efficiently.

Here are some of the new features of Beacon's Quoting Center:

- **Quick Quote:** Enter key information, only seven field entries, and receive a quick quote, which is an estimate based on entered data. From a Quick Quote, you can start a New Quote.
- **New Quote:** Allows you to enter new policy information directly into form fields. You can start a new quote from a saved Quick Quote as well. Once complete, you can export your information into an ACORD form to save for your files.
- **Drag-n-drop an ACORD form into the Quoting Center.** The Quoting Center will import the information from your form and populate the form fields.

Note: The Quoting Center will attempt to process any ACORD form that you Drag-n-drop or browse and upload, however, your best results will be processed from the most recent version of the ACORD form. You can download the most recent ACORD form from the Quoting Center Forms and then upload it once it is complete.

Important: The Quoting System will be available during normal business hours and will not be available during system processing and scheduled maintenance.

BEACONNECT User Requirements

You must be a registered BEACONNECT agency user with the Full Access role to be able to use the Quoting Center. In addition to processing quotes, BEACONNECT agency users can also access their dashboard to view their book of business.

Browser Requirements

The Agency Quoting Center supports these browsers: Internet Explorer, Chrome, Firefox, Safari, and Edge. For specific browser details, visit BEACONNECT [System Requirements](#) help.

All browsers must have the pop-up blocker disabled. Click here to open the [BEACONNECT-Pop-up-Blocker](#) list of browser websites that contain steps to disable the pop-up blocker.

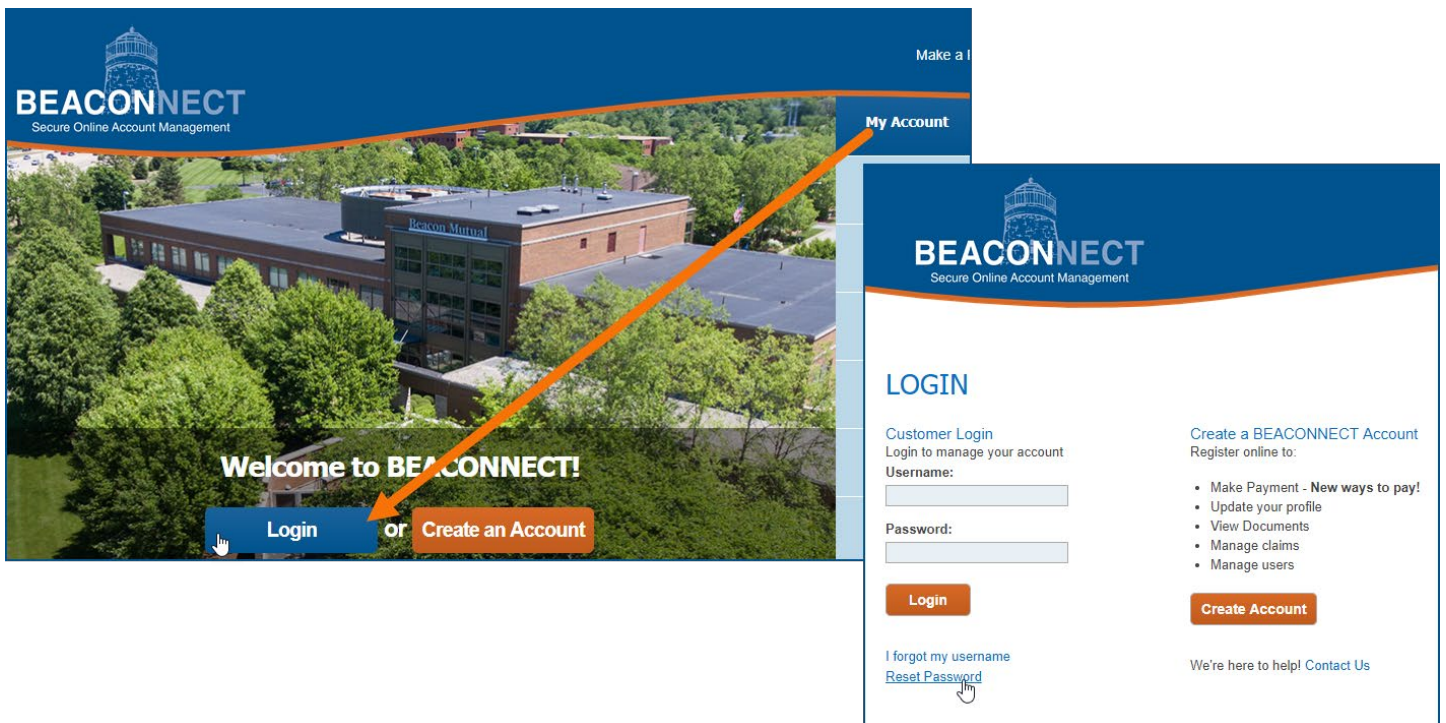
Need Help?

Click the question mark (?) icon in the Quoting Center to visit the help page.
Contact the Beacon Help Desk: 401.825.2650
HelpDesk@beaconmutual.com

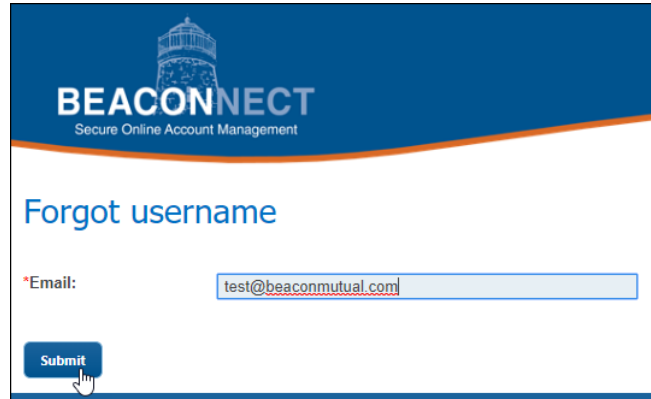
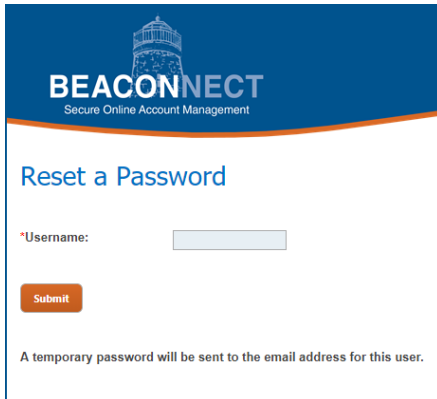
Getting Started

Sign in to BEACONNECT

1. Open the BEACONNECT website:
 - a. <https://beaconnect.beaconmutual.com>
2. Enter your username and password:
 - a. If you do not remember your username:
 - Usernames include the first letter of your first name and your last name. For example: Mary Smith would be msmith.
 - If you forgot your username, you will be prompted to enter your email address and the username associated with your email will be sent to you. If you do not receive an email within the day, please notify your Key Contact to ensure your email address is correct.
 - b. If you do not remember your password:
 - Click the **Reset Password** and a temporary password will be sent to the email address associated with your username:

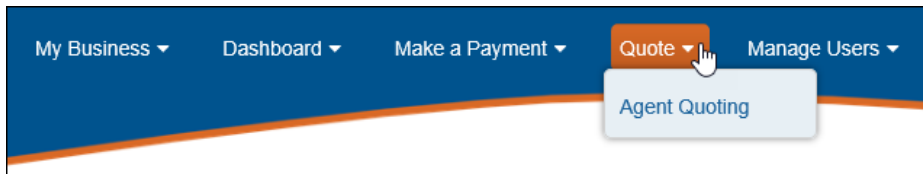


- To reset your username or password, click the **Reset Password** link or the **I forgot my username** link and click **Submit**:



If you selected to reset your password, an email with a temporary password will be sent to your email address on file. If you forgot your username, the username associated with your email will be sent to you.

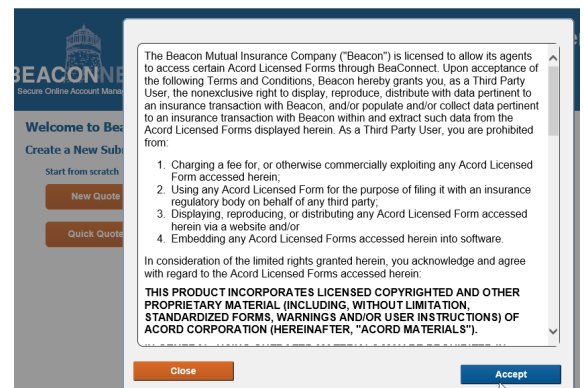
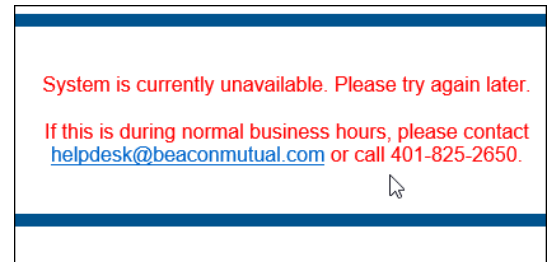
- Once you sign in successfully, the BEACONNECT home page will redisplay. If you are an agency user, the Quote button will appear in the top menu.
- Select Quote > **Agency Quoting**:



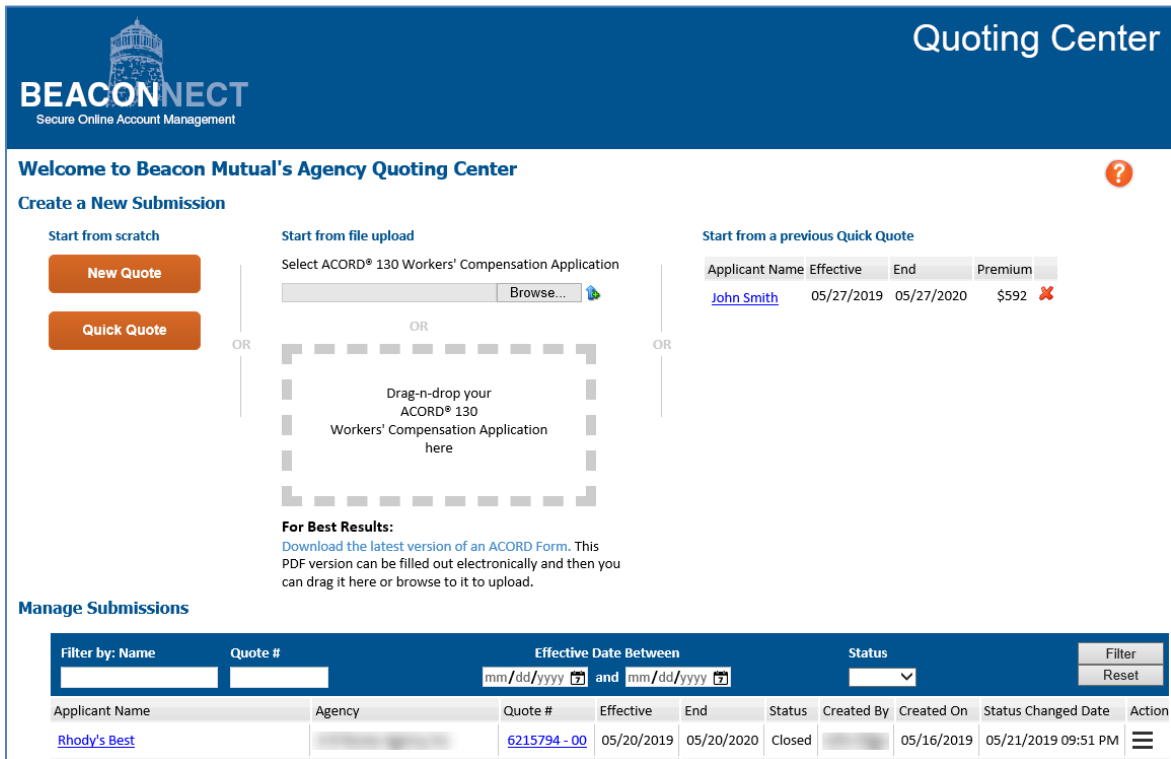
A new window, Quoting Center, will open to welcome you to Beacon's Agency Quoting Center.

Note: BEACONNECT will remain open in the original browser window.

- If you are attempting to access the Quoting Center when the system is being refreshed, you will receive the following message. Please try again later.
- Read the Terms & Conditions Disclaimer for using the Beacon Quoting Center application. This disclaimer window displays only the first time that you access the Quoting Center.
- Click **Accept** to continue to the Quoting Center.



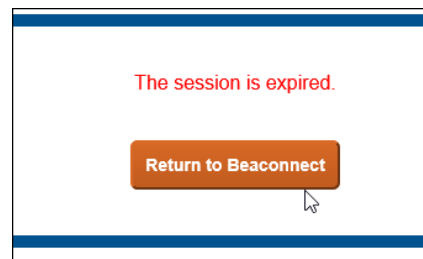
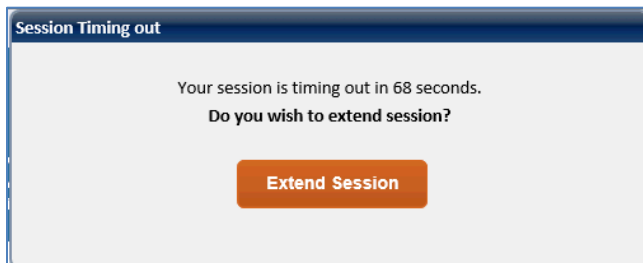
9. If you need help at any time, click the Question Mark (?) icon to visit the Help page:



10. Note the two sections on the dashboard:

- **Create a New Submission:** Use the Quick Quote, New Quote, or Drag-n-drop option to start a new quote submission. Note that the Quick Quote section does not display until you have added your first Quick Quote.
- **Manage Submissions:** Scroll down the page to view all the quotes that you have submitted.

The Quoting Center will time out after ten (30) minutes of inactivity. You will be prompted to extend your session, and if you do not click the Extend Session button, your session will end.



Quick Quotes

The first way to get started with a new submission is to create a Quick Quote. A quick quote is a rough estimate, and is not the final quote; it can be used as the starting point to create a New Quote, which can be submitted and used to bind coverage.

Create Quick Quote

1. On the Quoting Center dashboard, click **Quick Quote** to open the Quick Quote window:

The screenshot shows the BEACONNECT Quoting Center interface. On the left, there's a sidebar with 'Welcome to Beacon' and 'Create a New Submission' options, including 'New Quote' and 'Quick Quote' buttons. The main area is titled 'Quoting Center' and contains a 'Quick Quote' form. The form has several required fields marked with a red asterisk (*):

- * Applicant Name: DJ Song
- * Policy Effective: 05/31/2019
- * Policy Expiration: 05/31/2020
- Experience Mod: 1.000
- * Employer Liability: 100/500/100
- * Existing Workers' Comp Insurance?: No
- * Temporary Employment Agency or Employee Leasing Agency?: No

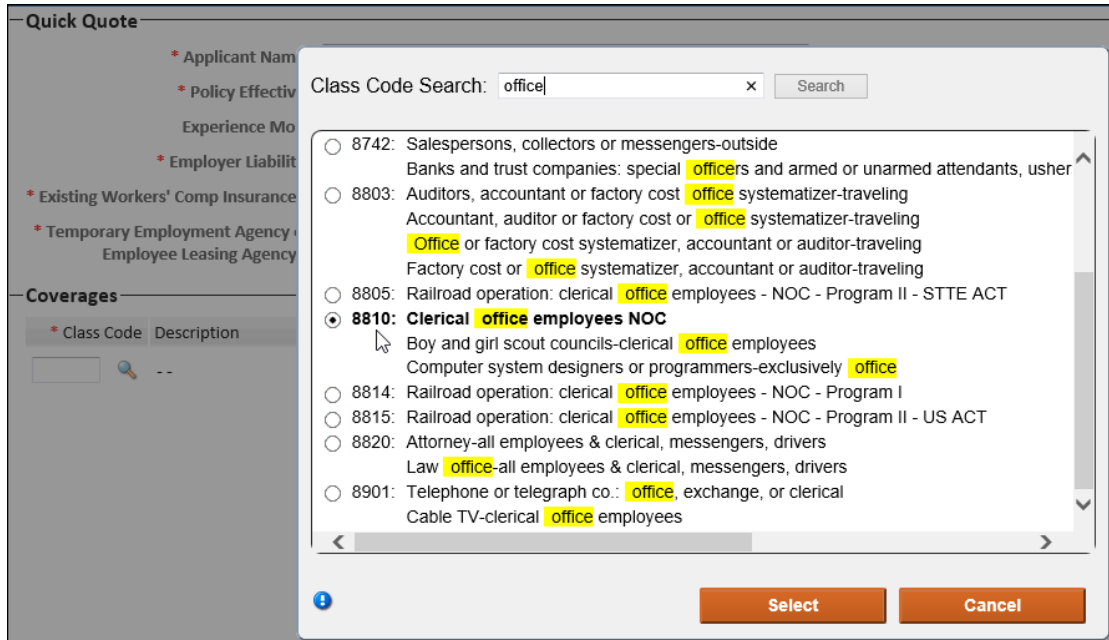
Below the form is a 'Coverages' table:

* Class Code	Description	# Employees	If Any Policy	Exposure
8810	Clerical office employees NOC	1	<input type="checkbox"/>	\$48,000

2. Enter information in the seven (7) required fields. A red asterisk (*) indicates the required information.
 - Applicant Name
 - Policy Effective and Policy Expiration dates
 - Experience Modifier (optional)
 - Employer Liability, and answer the two questions:
 - Existing Workers' Comp Insurance
 - Temporary Employment or Leasing Agency.
 - Coverage Code(s)
3. If you have existing workers' compensation insurance, select Yes and then fill in the Number of Years in business and whether the business has been loss free:

This is a close-up of the 'Quick Quote' form. A blue tooltip box is overlaid on the form, containing the text: 'You may be eligible for a Loss Free Credit if you currently have Workers' Comp Insurance. To qualify you must have no gaps in coverage and no losses.' The form fields are the same as in the previous screenshot, with the 'Existing Workers' Comp Insurance?' dropdown menu highlighted.

- For Coverages, enter at least one class code in the Coverages section. If you do not know what the class code is, but you know the type of business, click the magnifying glass icon to search for a class code. Click the radio button next to the code that applies, and then click **Select**:



- For each code, enter the number of employees and the exposure (total payroll for the number of employees), and click the check box if you know if this is an If Any Policy.
- Click **Calculate** to view the estimated premium that could be required to bind this policy. The page will redisplay with the Premium listed below the Coverages section.



- Optionally, if you would like to create an actual New Quote from this Quick Quote, click **New Quote** in the top menu to continue with the submission process. See the information to [Start from a Quick Quote](#).

BEACONCONNECT
Secure Online Account Management

Quoting Center

Calculate New Quote Refresh

Quick Quote

* Applicant Name:

* Policy Effective: * Policy Expiration:

Experience Mod:

* Employer Liability:

* Existing Worker's Comp Insurance?:

* Temporary Employment Agency or Employee Leasing Agency?:

Coverages

* Class Code	Description	# Employees	If Any Policy	Exposure
8810	Clerical office employees NOC	2	<input type="checkbox"/>	\$64,000

Premium

Estimated Annual Premium: \$336

This is a premium indication only and is subject to change upon submittal and analysis of complete application information and loss runs.

- Close the Quick Quote window if you are not ready to continue with the submission process. **Note:** Your Quick Quote will be saved to the dashboard for five (5) days. If you return to the Quoting Center dashboard and do not see your Quick Quote listed, refresh your browser window.

How Quick Quotes are Calculated

The calculation is determined by the class codes that were entered, the payroll amount, an experience modification if one was entered, as well as the answers to the Loss Free and Temporary Employment questions. The Quoting Center also uses the information entered to determine the rate for the appropriate policy tier, and eligibility for any loss free credits.

The estimated premium may require that an underwriter review the information, and the premium in the quick quote might change when used for a new quote.

New Quotes

The New Quote feature allows you to create a submission in one of three ways:

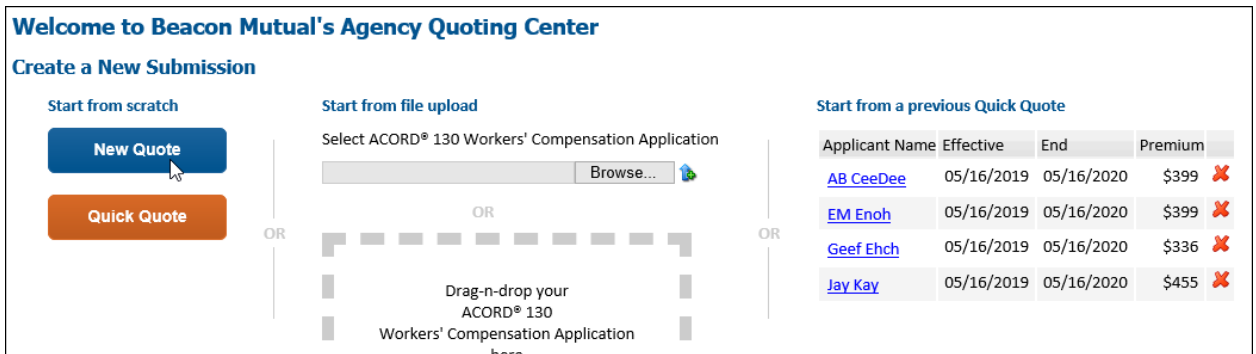
1. Start from scratch: enter new policy information directly into form fields,
2. Start from a Quick Quote,
3. Or, start a submission by uploading an existing ACORD form.

When all submission information is complete and your new quote saved, you can export the quote submission information to an ACORD form (pdf) that you can save for your files.

Start from Scratch

In BEACONNECT, click the Quote > Agent Quoting menu option to open the Quoting Center. From the Quoting Center dashboard, follow these steps to create a submission from scratch:

1. Click the **New Quote** button to open the Submissions window:



2. Enter policy information. The application date is prefilled and the status bar will have started. A red asterisk (*) indicates a required field. You must fill in all required fields before you can save a draft of the submission:

10% Complete

Policy

Application Date: 05/28/2019

* Agency: USI Insurance Services LLC (02287)

* Effective: mm/dd/yyyy * Expiration: mm/dd/yyyy

* Employer Liability: 100/500/100

* Existing Workers' Comp Insurance?: Yes No

* Number of Years: 5

* Loss Free?: Yes No

Year # of Medical Claims # of Loss Time Claims

Note: Voluntary Comp check box must be checked if voluntary codes are entered:

* Is the applicant's Loss ratio over the last 3 years less than 70%?: Yes No

USL&H: Voluntary Comp:

Workers' Comp State: RI States Other Than RI:

- If you have existing workers' compensation insurance, select Yes and indicate if you were loss free:

Policy

Application Date: 05/14/2019

Agency: USI Insurance Services LLC (00142)

* Expiration: mm/dd/yyyy

* Existing Workers' Comp Insurance?: Yes

USL&H: Voluntary Comp:

Workers' Comp State: RI States Other Than RI:

Additional Coverages:

You may be eligible for a Loss Free Credit if you currently have Workers Comp Insurance. To qualify you must have no gaps in coverage and minimal losses.

* Effective: mm/dd/yyyy

* Expiration: mm/dd/yyyy

* Employer Liability: 100/500/100

Are you loss free during this period?

* Existing Workers' Comp Insurance?: Yes

* Number of Years: 3

* Loss Free?: Yes

USL&H: Voluntary Comp:

- If you were not loss free, enter the number of medical-only and loss time claims. For medical-only or lost time claims, you can upload loss run documents in the panel.

10% Complete

Policy

Application Date: 05/28/2019

* Agency: USI Insurance Services LLC

* Effective: mm/dd/yyyy

* Employer Liability: 100/500/100

* Existing Workers' Comp Insurance?: Yes

* Number of Years: 5

* Loss Free?: No

Year	# of Medical Claims	# of Loss Time Claims
2018 - 2019	0	0
2017 - 2018	0	0
2016 - 2017	0	0
2015 - 2016	0	0
2014 - 2015	2	0

* Is the applicant's Loss ratio over the last 3 years less than 70%?:

USL&H: Voluntary Comp:

Workers' Comp State: RI States Other Than RI:

Additional Coverages:

From today, how many consecutive years (no gaps) of coverage have you had?

- Enter the Insured information. You can enter a zip code and click the binocular icon to allow Google to search for the correct city and state information:

- Expand each section and enter all required information, and optionally enter other information that will help calculate the most accurate policy premium.
- Enter at least one class code. If you do not know it, click the search icon and you can search for type of business, and enter the number of employees and total payroll for each class:

#	Location	Period	Class	Description	Classification	# Employees	Exposure
-1	-1-RI-Sample-Test	--	8810	Clerical office employees NOC	Standard	2	\$200,000

- Answer all the questions in the General Information section. If you would like to answer No to all the questions, click the top No radio button:

#	Question	Yes	No
1	Does the applicant own, operate or lease aircraft/watercraft?	<input type="radio"/>	<input checked="" type="radio"/>
2	Do/have past present or discontinued operations involve(d) storing, treating, discharging, applying, disposing, or transporting of hazardous materials (e.g. landfills, wastes, fuel tanks, etc)?	<input type="radio"/>	<input checked="" type="radio"/>
3	Any work performed underground or above 15 feet?	<input type="radio"/>	<input checked="" type="radio"/>

- When you are finished entering information, and the status is at 100%, you can click an option in the top menu:

- Save: The submission will be saved in Draft status and will be listed on the dashboard.
- Submit: The status will depend on the policy information that was entered.
- Refresh: Clear the form entries.
- Forms: Find a form that you would like to download.
- View ACORD: Generate a PDF of the submission application for your files.

10. When you submit a New Quote, you will receive a pop-up message indicating the next steps. See the [Submitting a Quote](#) section.

Tips:

- FEIN must be unique.
- Risk Location can include one or more than one company location.
- Some Rhode Island employers may be eligible for a shared earning program. See the [Rhode Island Hospitality Association Members](#) section.

Rhode Island Hospitality Association Members

There may be incentives for any company that is a member of the Rhode Island Hospitality Association. When entering quote information on the Submissions window, make sure that you answer the Member of RI Hospitality Association question:

The screenshot shows a form titled "Insured" with the following fields and values:

- * Applicant Name: El Em
- Email: [Redacted]
- * Ownership Type: Partnership and Individual
- Member of RI Hospitality Association?: No
- * Temporary Employment Agency or Employee Leasing Agency?: [Redacted]

Start from an ACORD Form

For best results, your ACORD form should be the latest version available. If it is not, all information in the form may not be uploaded correctly for a New Quote.

1. On the Quoting Center dashboard, below the Drag-n-drop box, click the link to download the latest version of the form if you would like to start a new submission request from the form. Fill out the form with the information that you have.

Drag-n-drop your
ACORD® 130
Workers' Compensation Application
here

For Best Results:
Download the latest version of an ACORD Form. This PDF version can be filled out electronically and then you can drag it here or browse to it to upload.

ACORD® WORKERS COMPENSATION APPLICATION DATE (MM/DD/YYYY)

AGENCY NAME AND ADDRESS: TEST-Company, 55555 My Company Road, Warwick, RI 02886

COMPANY: TEST POLICYHOLDER

UNDERWRITER: BEACON Underwriter

APPLICANT NAME: TEST Applicant

OFFICE PHONE: 401-825-2774

MAILING ADDRESS (including ZIP + 4 or Canadian Postal Code): One Beacon Centre, Warwick, RI 02842

MOBILE PHONE: YRS IN BUS: 4

PRODUCER NAME: Test Agency

CS REPRESENTATIVE: Test CSR

OFFICE PHONE: 401-999-9999

MOBILE PHONE: 401-999-9999

FAX: 401-999-9999

E-MAIL ADDRESS: test-csr@testcompany.com

E-MAIL ADDRESS: info@beaconmutual.com

SOLE PROPRIETOR, PARTNERSHIP, CORPORATION, SUBCHAPTER 'S' CORP, LLC, JOINT VENTURE, TRUST, UNINCORPORATED ASSOCIATION, OTHER

AGENCY CUSTOMER ID: CODE: SUB CODE: CREDIT BUREAU NAME: FEDERAL EMPLOYER ID NUMBER: NCCI RISK ID NUMBER: ID NUMBER: OTHER RATING BUREAU ID OR STATE EMPLOYER REGISTRATION NUMBER

STATUS OF SUBMISSION QUOTE ISSUE POLICY BOUND (Give date and/or attach copy) ASSIGNED RISK (Attach ACORD 133)

BILLING / AUDIT INFORMATION **BILLING PLAN** AGENCY BILL DIRECT BILL **PAYMENT PLAN** ANNUAL SEMI-ANNUAL QUARTERLY % DOWN: **AUDIT** AT EXPIRATION MONTHLY SEMI-ANNUAL QUARTERLY

LOCATIONS

LOC #	HIGHEST FLOOR	STREET, CITY, COUNTY, STATE, ZIP CODE
		One Beacon Centre, Warwick, RI, 02886

POLICY INFORMATION

PROPOSED EFF DATE	PROPOSED EXP DATE	RATING EFFECTIVE DATE (if applicable)	ANNIVERSARY RATING DATE (if applicable)	PARTICIPATING	RETRO PLAN

2. Save the ACORD form or locate the ACORD form that you have on your local device.
3. Upload the ACORD in one of two ways:
 - Browse to the ACORD form to select it, and then click the Upload icon to import the form into the Quoting Center:

Welcome to Beacon Mutual's Agency Quoting Center

Create a New Submission

Start from scratch

New Quote

Quick Quote

Start from file upload

Select ACORD® 130 Workers' Compensation Application

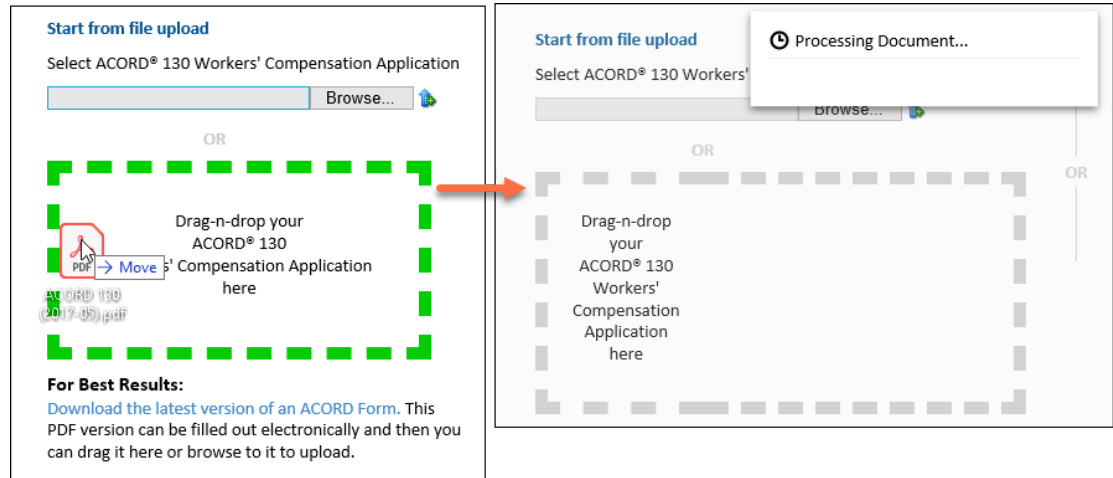
C:\Users\Desktop\ACORD ACORD

OR

OR

- Drag-n-drop the ACORD form into the area on the dashboard.

Note: The gray dotted-line box will turn green when you are in the right area to drop your file. Wait for the importing of the file to process:



- In the Submission window, continue to enter information for the New Quote. The percentage complete depends on how much information was entered on the ACORD form. **Note:** As you enter information for the submission, the ACORD form will display on the lower half of the split screen to indicate where on the form the information relates:

Member of RI Hospitality Association?: No

* Temporary Employment Agency or Employer: If unknown, please enter one of the following values

* State Unemployment Id:

Risk Group: Risk ID

Additional Company Information:

Established Employer: 0000000001
 New Employer: 0000000002
 Exempt Employer: 0000000003
 If Any Policy: 0000000004

MOBILE PHONE:	SOLE PROPRIETOR	CORPORATION	LLC	TRUST	UNINCORPORATED ASSOCIATION
FAX (A/C. No.):	PARTNERSHIP	SUBCHAPTER "S" CORP	JOINT VENTURE	OTHER:	
E-MAIL ADDRESS:	CREDIT BUREAU NAME:	FEDERAL EMPLOYER ID NUMBER	NCCI RISK ID NUMBER	ID NUMBER: OTHER RATING BUREAU ID OR STATE EMPLOYER REGISTRATION NUMBER	
CODE:	SUB CODE:				
AGENCY CUSTOMER ID:					

STATUS OF SUBMISSION		BILLING / AUDIT INFORMATION		
QUOTE	ISSUE POLICY	BILLING PLAN	PAYMENT PLAN	AUDIT

- Expand the Risk Locations, Officers, Coverages, and other sections and enter the required information:

[-] Risk Locations

CANNOT BE PO BOX OR OUT OF STATE ADDRESS

Loc #	Name	Address 1	Address 2	Zip	City	State
-1	TEST-Policyholder	test@testcompany.com		02842-9999	Middletown	Ri

[-] Officers

First Name	M.I.	Last Name	Date of Birth	Title	Ownership %	Coverage Type	Covered	DWC-11 Rec

[-] Coverages

#	Location	Period	Class	Description	Classification	# Employees	Exposure	Manual Rate	Manual Prem	Min Prem
-1	-1-TEST-Policyholder	--	8810	Clerical office employees NOC	Standard	4	\$220,000	--	--	--

[-] Remarks

- In the General Information section, answer the questions by selecting the Yes or No radio buttons. If you know all the questions should be answered with No, select the top No radio button:

General Information

Select No button to set all answers to No

#	* Question	Yes	No
1	Does the applicant own, operate or lease aircraft/watercraft?	<input type="radio"/>	<input checked="" type="radio"/>
2	Do/have past present or discontinued operations involve(d) storing, treating, discharging, applying, disposing, or transporting of hazardous materials (e.g. landfills, wastes, fuel tanks, etc)?	<input type="radio"/>	<input checked="" type="radio"/>
3	Any work performed underground or above 15 feet?	<input type="radio"/>	<input checked="" type="radio"/>

- If you do not want to Submit the quote, click **Save** to save it in Draft status. You must fill out the required information before you can Save. If not, a pop-up window will display a list of items that are required:

10% Complete

Policy

Application Date: 05/08/2019

* Agency: No Producer (01733)

* Effective: 05/10/2019

* Employer Liability: 1000/1000/1000

* YRS In Bus: 4

* Have you had Worker's Comp Insurance for the last 6 consecutive years (since business was established) and been continuously in business?

Year	# of Medical Claims	# of Loss Time Cl
2018 - 2019	0	
2017 - 2018	0	
2016 - 2017	0	
2015 - 2016	0	

* Is the applicant's Loss ratio over the last 3 years less than 70%?:

USL&H:

Message from webpage

! The following items must be corrected in order to save:

- Description of Operations is required.
- Number of claims can't be all zeros.
- The applicant's Loss ratio question must be answered.
- State Unemployment Identifier is required.
- County is required.
- Applicant State is required.
- Applicant Address is required.
- Applicant City is required.
- Applicant Zip Code is required.
- Applicant FEIN is required.
- Ownership Type is required.
- Applicant Name is required.
- Risk Location State must equal RI. Risk Location State is required.
- Risk Location Street Address is required.
- Risk Location City is required.
- Risk Location Zip Code is required.
- Risk Location Name is required.
- The code for this field is not recognized.
- Class Code Description not set. Either the Class Code value is invalid or the lookup has not completed. Class is required to save a coverage record.
- Payroll Exposure is required to save a coverage record.
- Number of Employees is required to save a coverage record.

- When all required information has been entered, click **Save** in the top menu:

Save
Submit
Refresh
Forms

98% Complete

Question

applicant engaged in any other type of business?

9. Review your saved submission. Note that the ACORD form displays in the Documents panel:

BEACONNECT
Secure Online Account Management

Save Submit

What's New 100% Comp

Quote Details

Quote #: 6215612
Status: Draft
Estimated Annual Premium: \$713
Deposit Premium Required: \$713

Policy

Application Date: 05/08/2019
* Agency: No Producer (01733)
* Effective: 05/10/2019
* Employer Liability: 1000/1000/1000
* YRS In Bus: 4
* Have you had Worker's Comp Insurance for the last 6 consecutive years (or since business was established) and been loss free?

Documents

Name	Type	Uploaded On
ACORD 130 (2017-05)	ACORD Form	05/08/2019

10. Click **Submit** to process the quote.

- If the submission meets the set criteria, and you are a contract agent, you will have the option to bind coverage, make a payment, or request a payment. See the Manage Submissions section for the actions available to you.

Start from a Quick Quote

Any Quick Quotes that you previously calculated will display on the dashboard for five (5) days. You can select any Quick Quote to start the New Quote process and enter more submission information:

Welcome to Beacon Mutual's Agency Quoting Center

Create a New Submission

Start from scratch Start from file upload Start from a previous Quick Quote

New Quote Quick Quote OR OR OR

Select ACORD® 130 Workers' Compensation Application

Browse...

Applicant Name	Effective	End	Premium
AB CeeDee	05/16/2019	05/16/2020	\$399
EM Erroh	05/16/2019	05/16/2020	\$399
Geef Ehch	05/16/2019	05/16/2020	\$336

Perform the following steps to start from a quick quote.

1. Click the **Applicant Name** to open the Submission window:

10% Complete

Policy

Application Date: 05/28/2019

* Agency: [Redacted]

* Effective: mm/dd/yyyy [Calendar]

* Expiration: mm/dd/yyyy [Calendar]

* Employer Liability: 100/500/100 [Dropdown]

* Existing Workers' Comp Insurance?: No [Dropdown]

USL&H:

Voluntary Comp:

Workers' Comp State: RI

States Other Than RI:

Additional Coverages: [Text Box]

Insured

* Applicant Name: Dave's Rate [Text Box] x +

* FEIN: [Text Box]

2. If the company has existing workers' compensation insurance, select Yes and then enter the Number of Years in business and whether or not the company was loss free:

10% Complete

Policy

Application Date: 05/28/2019

* Agency: [Redacted]

* Effective: mm/dd/yyyy [Calendar]

* Expiration: mm/dd/yyyy [Calendar]

* Employer Liability: 100/500/100 [Dropdown]

* Existing Workers' Comp Insurance?: Yes [Dropdown]

* Number of Years: 5 [Dropdown]

* Loss Free?: No [Dropdown]

You may be eligible for a Loss Free Credit if you currently have Workers' Comp Insurance. To qualify you must have no gaps in coverage and no losses.

Year	# of Medical Claims	# of Loss Time Claims
2018 - 2019	0	0
2017 - 2018	0	0
2016 - 2017	0	0
2015 - 2016	0	0
2014 - 2015	2	0

* Is the applicant's Loss ratio over the last 3 years less than 70%?: [Dropdown]

USL&H:

Voluntary Comp:

Workers' Comp State: RI

States Other Than RI:

Additional Coverages: [Text Box]

Insured

* Applicant Name: Dave's Rate [Text Box] x +

The Quick Quote information is entered for the submission. Note that the starting status with Quick Quote information is 20% complete.

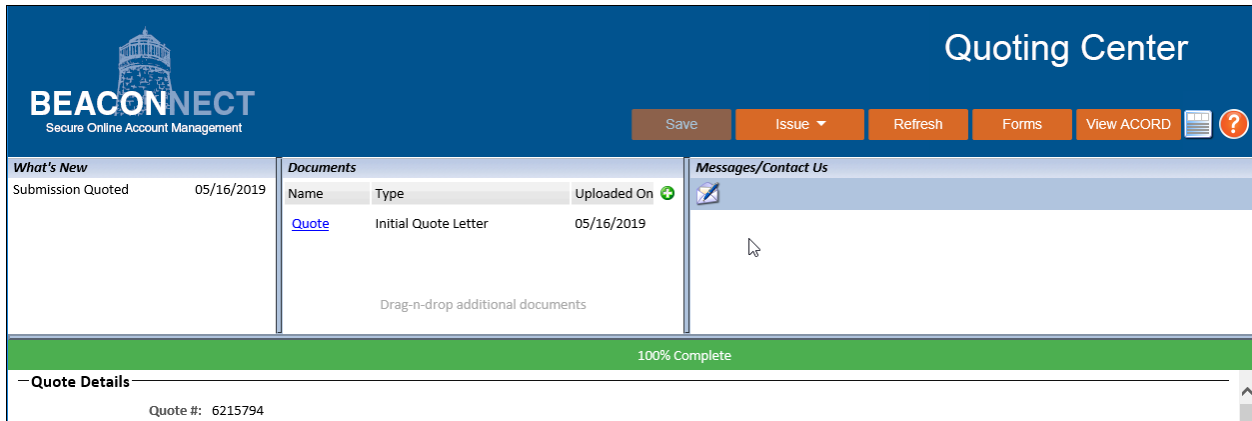
3. Enter the New Quote details. For more information, see the details in the [Start from Scratch](#) section of this guide.

Panel Features

The panel in the Submissions window of the Quoting Center is on the left side by default.

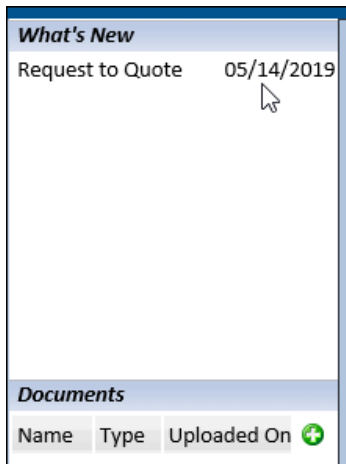
To move the panel to another location, click the panel icon in the top menu to move it to the left, right, top or bottom, or select None to close the panel.

The panel is divided into three sections: What's New, Documents, and Messages/Contact Us:



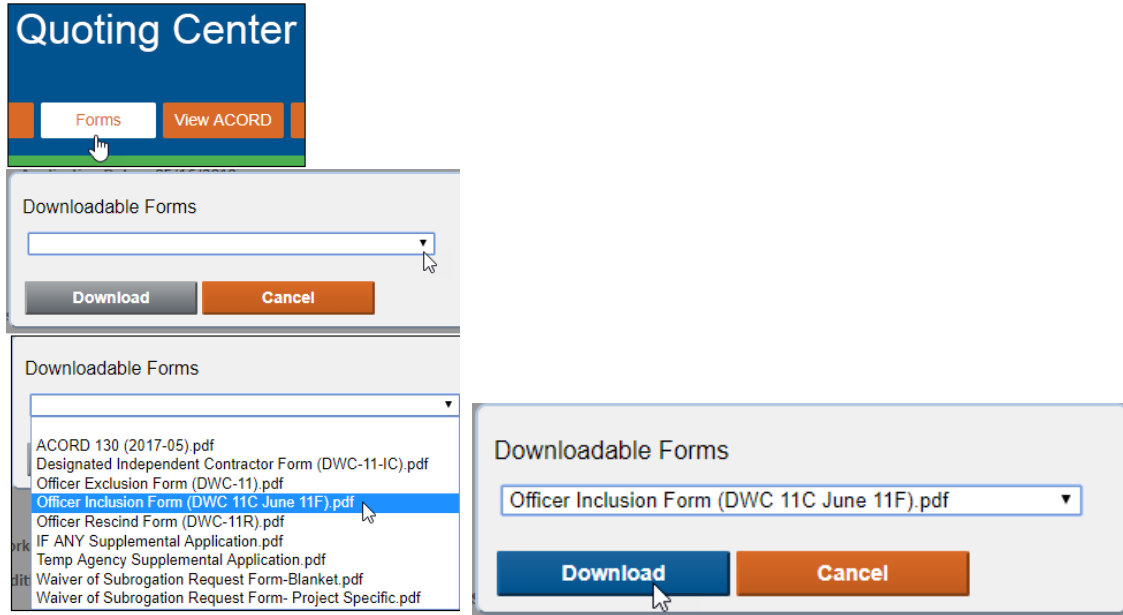
What's New – Quote Activity

The What's New section of the panel displays a chronological history of activity for a submission:

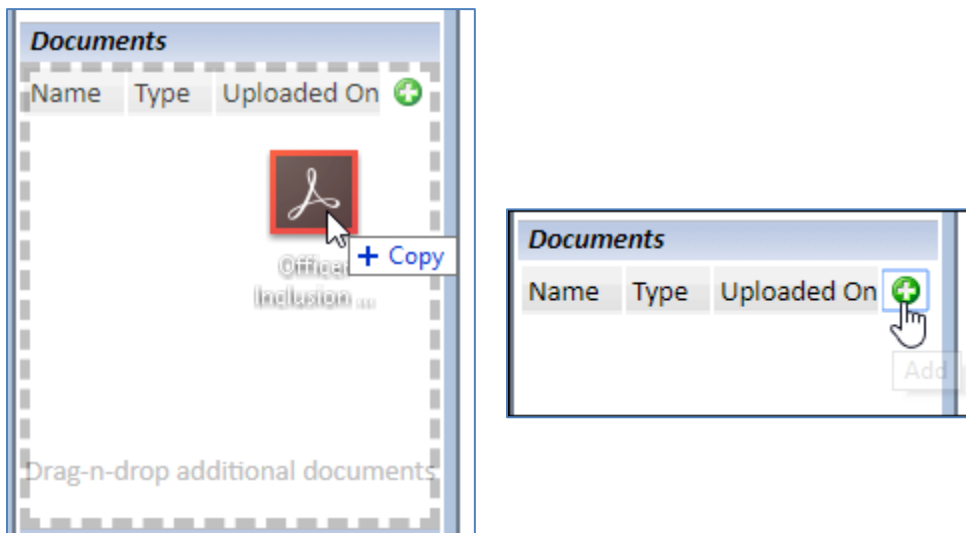


Documents – Downloading & Uploading

Download a Form: Click the Forms menu option to open the Downloadable Forms drop-down menu. Select a form in the list, and then click **Download**. You will be prompted to browse to a location where your file will be saved:



Upload a document: You can click the green plus (+) icon to browse to a document or you can Drag-n-drop a file into the Documents section of the panel.



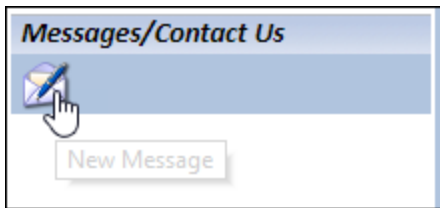
Note: For any email sent and received from the Quoting Center that has a file attached, the file will automatically be uploaded to the Documents list. See the next [Messages – Sending & Receiving](#) section for details.

Messages – Sending & Receiving

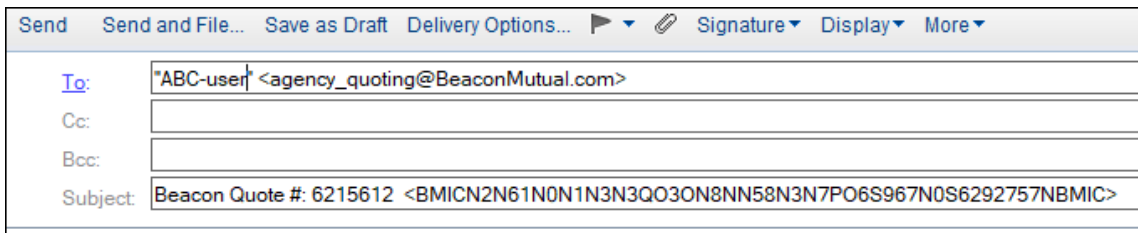
In the Quoting Center panel, emails can be sent by the agency user and the Beacon underwriter. Each email will be recorded in the Messages section of the panel.

To send a message:

1. Click the Messages letter icon to access your email application:



2. In your email application, the To field will default to the underwriter:

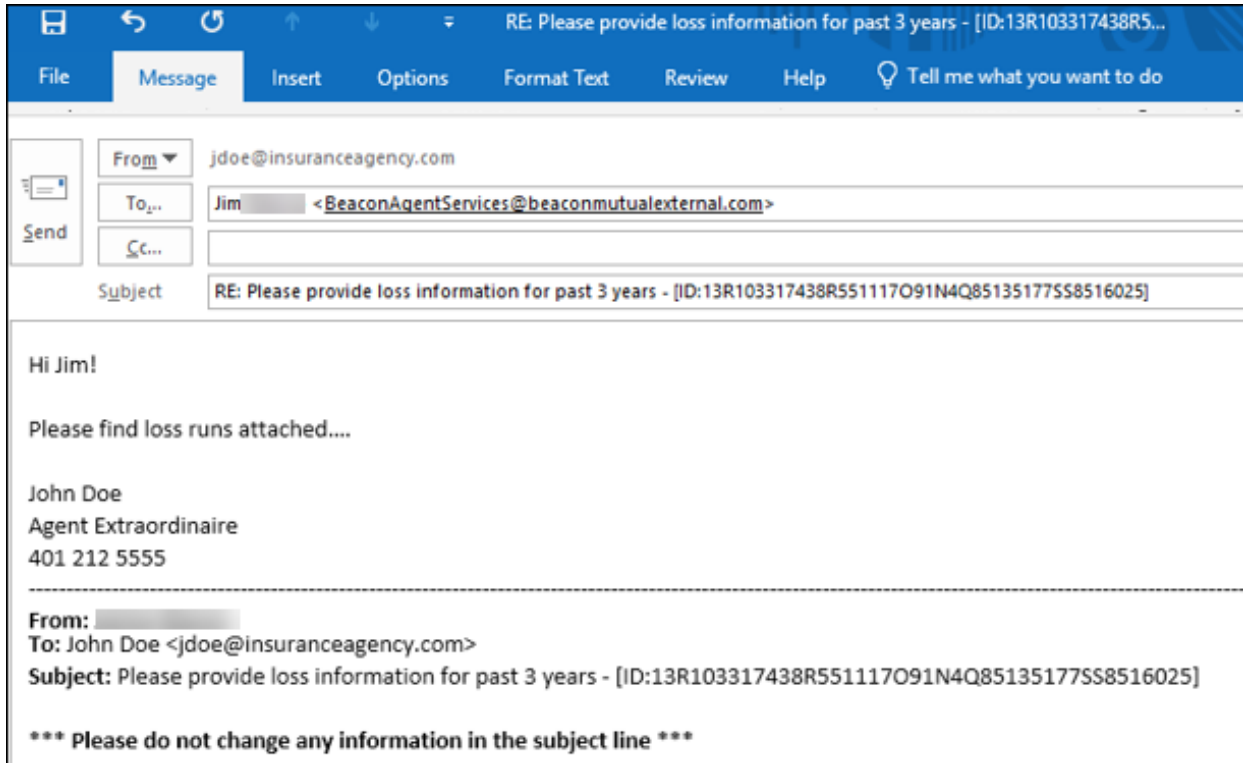


Note: The subject line should not be changed. It includes the Beacon Quote number as well as an encrypted key identifier (ID) in brackets. This ID is used to copy the email to the Quoting Center and display it in the Messages section of the panel.

Respond to an email:

1. If you receive an email to which you reply, make sure you do not change the subject line to ensure your response appears in the Messages section of the dashboard panel.
2. Attach any requested documents or forms to your email when requested.

Note: Any email attachment, when received by the Quoting Center, will load your attached file in the Documents section of the panel:



By keeping the subject line with the quote ID information, the email will appear in the Quoting Center panel:

What's New	Documents	Messages/Contact Us																									
<table border="1"> <tr><td>Policy Issued</td><td>5/10/2019</td></tr> <tr><td>Document Updated</td><td>5/9/2019</td></tr> <tr><td>Submission Bound</td><td>5/8/2019</td></tr> <tr><td>Submission Quoted</td><td>5/7/2019</td></tr> </table>	Policy Issued	5/10/2019	Document Updated	5/9/2019	Submission Bound	5/8/2019	Submission Quoted	5/7/2019	<table border="1"> <thead> <tr> <th>Name</th> <th>Type</th> <th>Uploaded On</th> </tr> </thead> <tbody> <tr> <td>ACORD 130 (2017-05)</td> <td>ACORD Form</td> <td>05/08/2019</td> </tr> <tr> <td>Loss Run Report</td> <td>Loss Run</td> <td>05/17/2019</td> </tr> </tbody> </table> <p>Drag-n-drop additional documents</p>	Name	Type	Uploaded On	ACORD 130 (2017-05)	ACORD Form	05/08/2019	Loss Run Report	Loss Run	05/17/2019	<table border="1"> <tr> <td></td> <td></td> </tr> <tr> <td>Beacon Quote #6215612</td> <td>5/7/2019</td> </tr> <tr> <td>Beacon Quote #6215612</td> <td>5/7/2019</td> </tr> <tr> <td>Beacon Quote #6215612</td> <td>5/7/2019</td> </tr> </table>			Beacon Quote #6215612	5/7/2019	Beacon Quote #6215612	5/7/2019	Beacon Quote #6215612	5/7/2019
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Manage Quote Submissions

On the Quoting Center dashboard, scroll down below the Create New Submission section to view a list of previously save quote submissions in the Manage Submissions section.

Quote submissions in Manage Submissions are listed with a set status. Each status determines what actions can and need to be taken to further the quote process.

Manage Submissions

Filter by: Name	Quote #	Effective Date Between		Status	Filter				
<input type="text"/>	<input type="text"/>	mm/dd/yyyy	and	mm/dd/yyyy	Reset				
Applicant Name	Agency	Quote #	Effective	End	Status	Created By	Created On	Status Changed Date	Action
TEST-Policyholder	No Producer	6215612 - 00	05/10/2019	05/10/2020	Closed		05/08/2019		Go to Quote
RI-Sample-Test	No Producer	6215747 - 00	05/20/2019	05/20/2020	Awaiting Quote		05/14/2019	05/14/2019 4:52 PM	

Action Menu Options

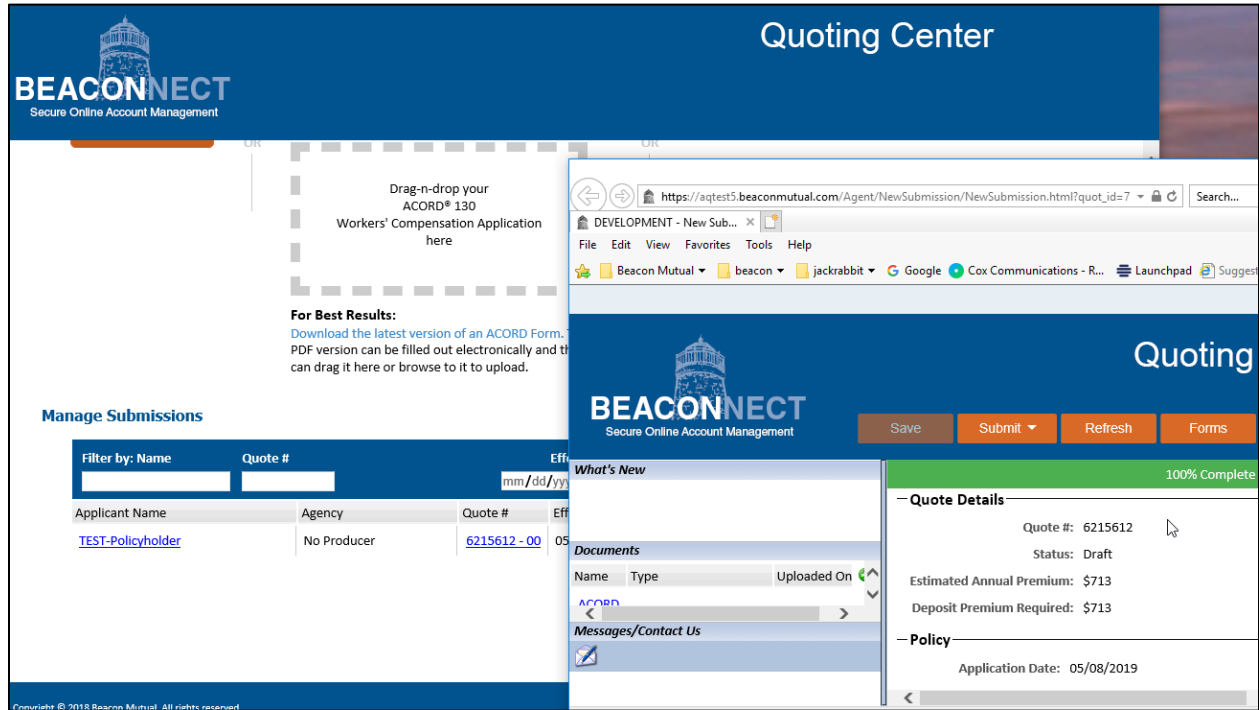
For each submission in the list, click the Action menu. A pop-up menu with options will display. The Action options are based on the status of the quote:

Manage Submissions

Filter by: Name	Quote #	Effective Date Between		Status	Filter				
<input type="text"/>	<input type="text"/>	mm/dd/yyyy	and	mm/dd/yyyy	Reset				
Applicant Name	Agency	Quote #	Effective	End	Status	Created By	Created On	Status Changed Date	Action
Rhody's Best	My Insurance Agency	6215794 - 00	05/20/2019	05/20/2020	Quoted		05/16/2019		Issue Bind Pay Now Request Payment Close Go to Quote
Ocean State Printing	My Insurance Agency	6215793 - 00	05/27/2019	05/25/2020	Draft		05/16/2019		

To open a quote, click the Applicant Name or Quote # link, or select **Go To Quote** from the Actions menu.

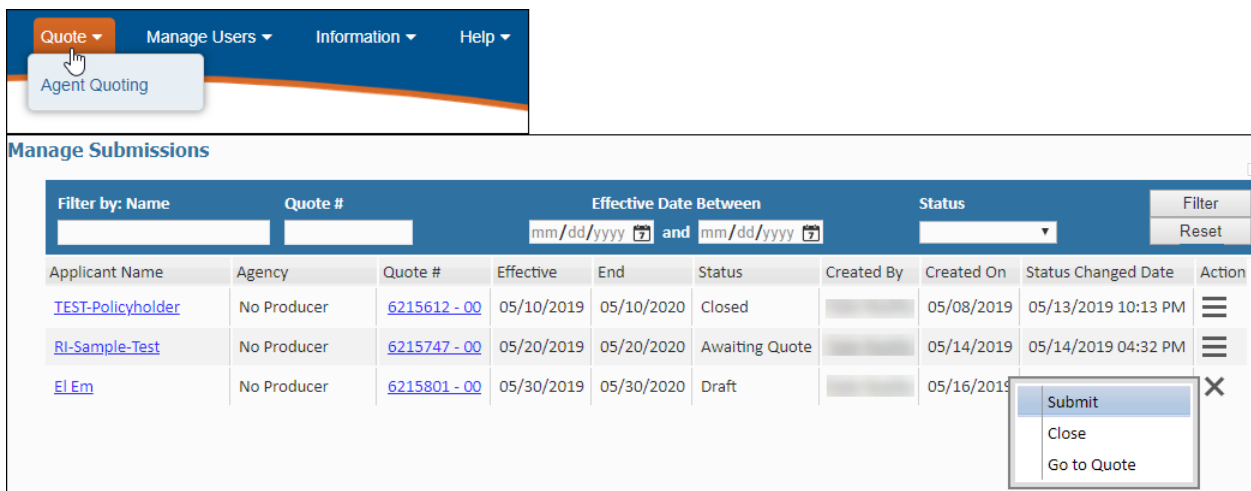
Note: When you select to open a quote from the Manage Submissions list, the Quote opens in a new Submissions window and the dashboard remains open in the background:



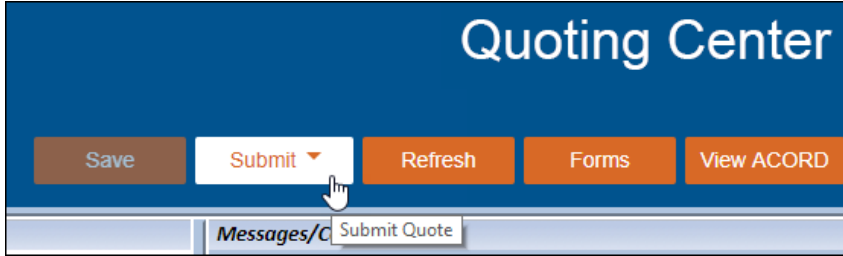
Submit a Quote

In BEACONNECT, select the Quote > Agency Quoting to open the Quoting Center dashboard and scroll down to the Manage Submissions section.

1. For the quote that you would like to submit, click the Action menu in the far right column, and click the **Submit** option. You can also click the Applicant Name or the Quote # link to open the quote:

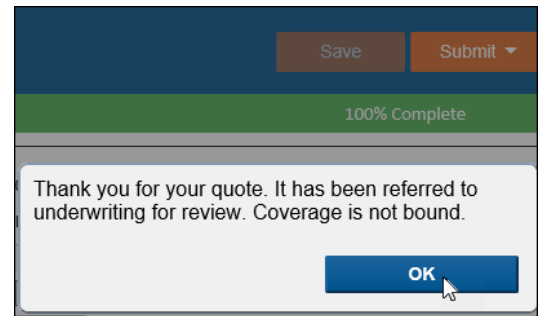


- When the Submission window opens, click **Submit** in the top menu:



After Quote Submitted:

- **Contract Agents:**
 - If the quote meets certain criteria, and you are a contract agent, you have the option to bind coverage or issue a policy. See the [Bind Coverage and Issue a Policy](#) section.
 - If the quote does not meet the criteria, you will receive a message indicating that the underwriter will review the quote.
- **Non-Contract Agents** cannot bind coverage or issue a policy, however, the non-contract agent can [Pay Now](#) or [Request Payment](#).

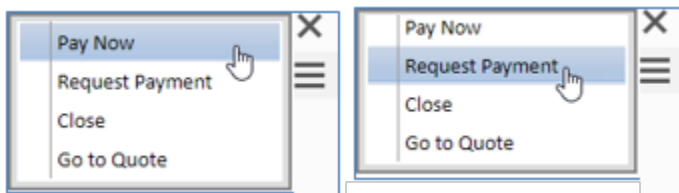


Pay Now or Request Payment

Both contract and non-contract agency users can make a payment or request a payment for a quote.

Non-Contract Agency: After a quote has been submitted, it cannot be issued or bound by the underwriter until a payment has been processed. To process a payment:

- In the Quoting Center dashboard, scroll down to the Manage Submissions section.
- Select the **Pay Now** or the **Request Payment** option from the Action drop-down menu:



- If you selected **Pay Now**, the New Pay window will open and you can make a payment by the agency or by the applicant. See to the [Payment Options](#) help page for more information.

Enter the submission information, including the Deposit Premium Required from the Quote Details section on the Submission page in the Quoting Center:

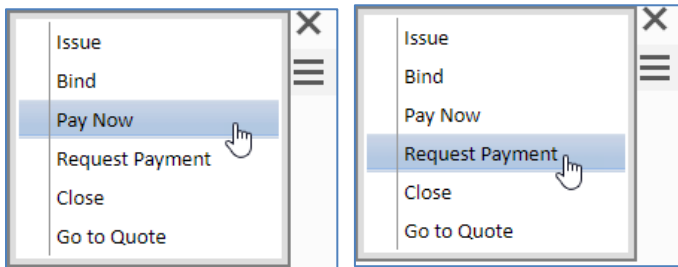
- If you select **Request Payment**, the Quoting Center will generate an email to the applicant's email address with the quote number, the Deposit Amount to be paid, and the link to the New Policy page in BEACONNECT.

To:	[redacted]@gmail.com
Cc:	
Bcc:	
Subject:	Beacon Mutual Payment Request&body=Quote Number: 6217181 Applicant Name: PH-TEST Deposit Amount: \$278.00

Note: If an applicant email was not entered, the Quoting Center will prompt you to enter the email address for the appropriate contact for the policy. The submission status will change to Awaiting Payment. If an email address is not entered, the payment process will end.

Contract Agency Users: Contract agency users will be able to issue a policy without payment. The Actions drop-down menu will have the Issue and Bind options in addition to the payment options.

1. In the Quoting Center dashboard, scroll down to Manage Submissions.
2. Select the **Pay Now** or the **Request Payment** option from the Action drop-down menu:



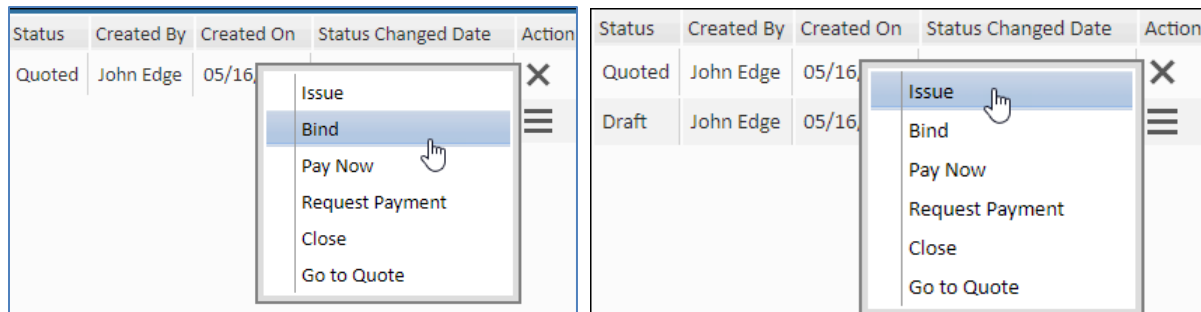
The **Pay Now** and **Request Payment** steps are the same as for the non-contract user (see above). See the [Payment Options](#) help page for more information.

Bind Coverage and Issue a Policy

Important Note: Only Contract Agents can bind and issue a policy if the quote meets certain criteria. If the quote was referred to an underwriter, the Bind and Issue action options will not be available for the submission.

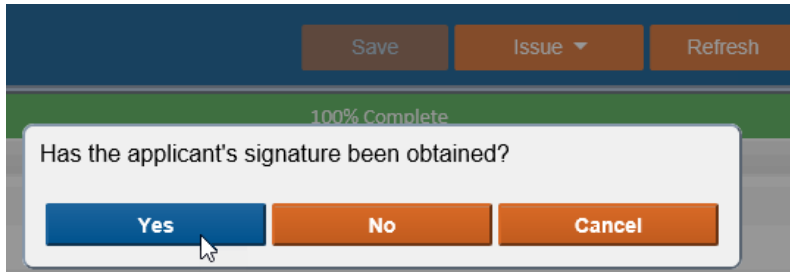
Binding a submission locks the submission, however, the policy is not active until the submission has been issued.

From the Quoting Center dashboard and scroll down to the Manage Submissions section to view a list of quotes. To bind a submission, click the Action menu and then click **Bind**:

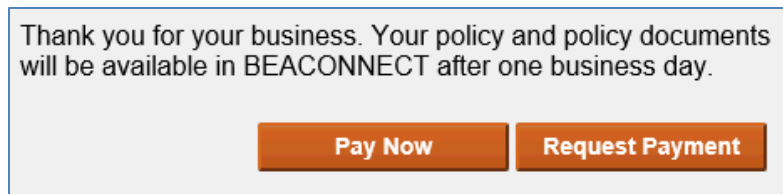


If you are ready to activate a policy, click **Issue** from the Action pull-down menu.

Note: If you have the Submission open, and you have the option to issue the policy, the Issue button will appear in the top Menu. Click **Issue**. You will be asked if you have obtained the applicant's signature:



If you select Yes, you will then be prompted to **Pay Now** or **Request Payment**:



See the [Pay Now or Request Payment](#) section for more information.

What's Next – Saving the ACORD Form

Agency Responsibility

Contract Agents are no longer are required to send a copy to Beacon Mutual. You must store ACORD application forms for your records.

If you are not a contract agent, you are required to send signed ACORD application form to Beacon Mutual as well as any Loss Run reports that are applicable.

From the Quoting Center dashboard, open your quote from the list in the Managing Submissions section. When the quote is open in the Submissions window, click View ACORD. You will be prompted to open or save the ACORD PDF file:

