Getting Acquainted with *Inland Marine Express®*

This quick guide will provide general information about navigating and various functions in IM Express®.

Click on a topic listed below to view information about functions in IM Express.

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When you have finished reviewing a section, click Return to Top to return to this page. The Return to Top link is provided at the bottom of every page.
Welcome to Inland Marine Express
This is the Home page of IM Express.

Note: Critical Announcements will display IM Express. These can be accessed by clicking Critical Announcements at the top of the page or by clicking Each Announcement listed on the right hand side of the page.

- The left-hand Navigation Bar is available on every page in IM Express. Perform any function listed on this bar such as New Quote, My Quotes and Endorsement Request.
- Access Product Brochures and Underwriting Guidelines for each Coverage.
- Access Federal Motor Carrier tools (FMCAS).
- Access various Help such as Contact Us, Frequently Asked Questions, Quick Guide and About IM Express.
Help Options

Contact Us: A separate document will open with contact information for the IM Express team and the technical systems Help Desk.

FAQ: The Frequently Asked Questions document provides answers to our most commonly asked questions on IM Express such as navigating within the system or creating and managing quotes.

About IM Express: This page displays information on IM Express capabilities and coverage information.

Quick Guide: Access the Getting Acquainted Quick Guide via Agent HQ or directly from the Help section of IM Express.
Help Options

About IM Express:
Displays information on IM Express capabilities and Coverage information.

What do you want to do?
- **Create a New Quote:** Displays the Account Information page to start a new quote.
- **Go to My Quotes:** Displays page for quotes that are in progress or rated, referred, bound or issued, and decline or withdrawn or expired.
- **Endorsement Request.**
What do you want to do?

- **Announcements:** Provides information such as system updates, coverage offerings, etc.

- **Message:** The Inland Marine Express team is available to answer questions or add other coverages, such as property, to your proposal. Call us at: 866-361-8840. Contact one of our Account Executives if you would like to know more about the capabilities of Travelers Inland.

### New Quote

#### 1. Entering a New Quote

To begin a new quote from the Welcome page in IM Express:

- Click [Create a New Quote](#)

**Note:** Clicking [New Quote](#) on the left nav bar will display the same page as clicking create a new quote under, What do you want to do?
2. Entering Account Information

This section collects general information about the Applicant, the Producer, and the Policy that needs to be added prior to adding the specific coverage information.

- A red asterisk* identifies fields that require completion.

Note: Some fields have a help icon. Clicking the icon opens a look up tool for information such as zip code options for the city and state entered.
3. Search SIC Code

Search SIC Code

- Search by keyword or code: Type Keyword or Code.
- Click: 

  Note: For our example we will type Contractor.

- Click: Code/Description
- Click: Select

  Note: The SIC Code and SIC description will prefill. Should it need to be changed follow the steps above.

Return to Top
• When all information has been entered and verified, click **Save**.

⚠️ **Note:** Coverage cannot be backdated.

⚠️ **Note:** Policy Term must be at least 3 months long and no longer than 12 months.

⚠️ **Note:** The Applicant Information section cannot be updated once this page is saved.

⚠️ **Note:** You must confirm a complete signed application is on file.

If this popup message displays, you have not confirmed you have a complete signed application on file. If you can confirm, click **OK**. If you cannot confirm, click **Cancel**.

When **Cancel** is clicked an information message will appear. A signed completed application is required to proceed in IM Express. The Inland Marine Express team can answer any question you may have. Please click **OK** to return to My Quotes.

If this popup message displays, the risk falls outside the eligibility guidelines. The Account Information will not be saved and the My Quotes page will display. Please contact the IM Express team to discuss the account.
4. Adding Coverage to the quote

The Quote Summary page displays automatically when the Account Information page is accepted.

The top of the page displays the applicant name, quote number, effective-expiration and company.

The Coverage Section shows two types of coverages available to quote.

- **IM Express Coverage Options** are items the agent can rate within IM Express.

- **Other Requested Coverage** allows the user to request additional coverages for the IM Express team to underwrite.

**Note:** The Action selection box will move down the page as you scroll.

Each time Account or Coverage Information is updated for IM Express Coverage Options, this page will redisplay. Premium and deductible for the coverages updated will display on this page as the quote is developed.

**Note:** Other Requested Coverage displays the premium. Deductible does not display.
To add an IM Express coverage, click **Add** next to the appropriate coverage(s).

**Note:** Quick Guides for each of the IM Express coverages are available through the Agent HQ.

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**Applicant Eligibility**

**Note:** Some fields have a help icon. Clicking the icon opens an information page describing the applicable information. Such as **Project Scope**. Once the information has been reviewed click the X in the upper right hand corner to close.

After entry of Applicant Eligibility is completed, click the **Determine Eligibility** button. Once this is clicked the screen may need to have more questions answered depending on the coverage options selected.
Coverage Eligibility

After entry of Coverage Eligibility is completed, click the **Determine Eligibility** button.

Depending on the type of coverage that is being rated, more questions may need to be answered.

Once all required questions are answered click the **Save** button.
Add Location is required for issuance.

Click **Add Location** to add locations.

*Note: Clicking back to Quote Summary will not save the information that was keyed.*

Once all required information is complete click the **Save** button.

When **Save** is clicked **Additional Coverages** section will display.

*Note: Clicking back to Quote Summary will not save the information that was keyed.*
Complete the Additional Coverage(s) that apply.

Note: Save your additional Coverage selection before returning to Quote Summary.

Click the Save button to save the information.

Note: Once the Save button is clicked, Back to Quote Summary will appear.

Click Back to Quote Summary to Rate the Quote.
5. Other Requested Coverage

Note: After at least one IM Express Coverage is completed, other coverages may be requested.

Click Add next to the appropriate coverage.

After entry of one IM Express coverage is completed, the “Rate” button becomes operable and the quote can be rated.

As each coverage is rated the Quote Proposal may be viewed. (See the Quote Proposal section for more details).

A referral message will be sent to the IM Express Team for their attention.

The Referral section goes into more details on the referral process.
6. Referrals

Upon rating, a message indicates that the information entered needs to be Referred to the IM Express Team.

Note: To add additional coverages before referring, click Add another Line of Business to continue working on the quote.

- When entry is complete, click Referral Message. A referral message will then be sent to the IM Express Team for review.

Information Message

All referral messages will display together on one pop up window. They will be grouped by each coverage that was referred.

- Click OK
Referral Message(s)

- Click Referral Message

All referral messages will display together on one pop up window. They will be grouped by each coverage that was referred.

- To provide additional information to the IM Express Team, click the Email IM Express Team link.
- Click the X in the top right hand corner to close the window after the Email has been sent to the IM Express Team.
An email will be started with information from the quote. Enter or attach any needed information in this email and send.

The producer contact will receive an email when the referral is approved or will be contacted by the IM Express Team to discuss the request further.

When the approval email is received, the quote will display on the My Quotes page in the In Progress and Rated list.

The Quote Proposal will now be available.

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7. View the Quote Proposal

**Note:** Once the email is sent a message will appear under Premium on the Quote Summary page showing “Contact Underwriting”.

- To view the Quote Proposal click *Quote Proposal* from the right nav bar or to the right of the account premium.

**Note:** The quote proposal can also be accessed from My Quotes page, under In Progress or Rated. Select View Proposal from the drop down box next to the Applicant Name.
The quote proposal will open in a new window.

- To print the proposal, click the icon.
- To close the proposal, click the \( \times \) in the upper right corner of the proposal window.

**Note:** To change information on the quote proposal, edit the quote.

- To bind the quote, close the proposal letter and select Bind Quote from the Quote Options Menu. Binding is also possible from the Quote Summary page after the account has been successfully rated.

**Binding the Quote**

Answer all applicable questions

Click Continue
How would you like to provide this information?:
Select Manual Entry, Fax or Email from the drop down box.

**Manual Entry:** Click the carrot to expand for information to be keyed. See below screen print for instruction.

**Fax:** Displays a Fax Cover Sheet

**Email:** Opens an Email

획득: Schedule(s) must be provided within 3 business days for policy to be issued. The proposal is valid for 60 days unless otherwise indicated. Any applicable state or local surcharges or taxes are additional.

획득: Certain coverages require a schedule upon binding:
- Contractors Equipment
- Scheduled Property
- Motor Truck Cargo
- Legal Liability (non-reporting).
Manual Entry: Click the carrot to expand for information to be keyed.

Click Add to add the AI

Informational Message appears:
Do you want to proceed with adding a new row? Click OK

Enter Applicable Information
Click Save
Note: The grid now shows the Additional Insured we added.
Click Add to add more Additional Interests.

Note: There may be more information to be completed. Click on carrots to complete information.

Billing: Select Direct Bill or Agency Bill from the drop down box.

Payment Plan: Select Prepaid, Semi Annual, Quarterly or 10 Pay (25% down and 9 Installments)

Click Save button

Note: The Save button needs to be clicked for the Confirm Bind to be enabled.

Click Confirm Bind button

Note: Back will return to the Bind page.
8. Binding the Quote

SUCCESS! Thank you for binding this account with Travelers Inland Marine Express.

Click Ok
Finding the Policy Number

1. Finding the Policy Number

Check the status of the bound or issued from the My Quotes page.
- Once all materials needed to issue the policy are received and the policy is issued, the Policy Number will be displayed in the Bound or Issued grid.

*Note:* You will know the policy has been issued when these three items display:
- the policy number,
- issued premium and
- issued date.

- To view or print the Binder, click View Binder from the drop down box next to the appropriate applicant name. The binder will open and can be printed and sent.
9. Endorsement Request

Endorsements may be requested for quotes that are issued.
- To request an endorsement, select **Endorsement Request** from the left navigation bar or from the What do you want to do? menu.

The Endorsement Request screen displays:
- A quote can be searched for by using the search filters at the top of the screen. Searches can be performed on the following criteria:
  - Named Insured
  - Quote Number
  - Producer Code
  - Policy Number
- Click the **Find** button.
- A search can also be performed by reviewing the Issued grid.
To view the options available for a quote, from the drop down box select **Endorsement Request**.

A pop-up warning message will display for completing the endorsement request. Click **OK**.
An e-mail draft will open in Outlook and generate the necessary information to be filled out.

Enter the endorsement details and the effective date of the change.

Click Send.

The e-mail is sent, and you are returned to the Endorsement Request screen.

Click Return to My Quotes button on the screen or My Quotes from the left navigation bar to return to the My Quotes screen.
Managing Quotes

1. Accessing My Quotes

To access a quote already existing in IM Express, click Go to My Quotes or My Quotes on the left navigation bar from the Welcome or Quote Summary page.

![Image of IM Express interface]

Return to Top
2. Searching for a quote

The My Quotes page displays. Each grid defaults to show an expanded view of the folders such as In-Progress or Rated, Referred, Bound or Issued and Decline or Withdrawn or Expired.

Open a quote directly from this page using the quote options menu or use the search options to help locate a particular quote.

- To search for a quote, use the search filters at the top of the page. There are multiple ways to search for accounts. Named Insured, quote number and policy number are examples.
- Click **Find**.
- Use the **Reset** button to re-display the grids using no filters.

✓ **Note:** If enter is pressed on the keyboard, nothing will happen. It will only filter when **Find** is clicked.
3. Reviewing My Quotes

For ease of locating a quote in the grid, the lists can be sorted by Effective Month.

Select the Effective month of the policy from the drop down.
Select the Effective year from the drop down.

The grid contents can be exported to Excel by clicking the icon on right side of this page. Each grid will be displayed on a separate worksheet.
4. View Contact Details

- To view the quote options menu, click the drop down box next to the insured’s name.
- To view agency contact details, click View Contact Details.

5. Contact Details

A pop up box displays. The Contact Details box displays agency information.
- To return to the My Quotes page, click the X on the Contact Details page.
To change the agency contact information, select Edit Quote to return to the Quote Summary page.

Click Edit Account Information from Quote Summary page.
6. Editing a Quote

On the My Quotes page, locate the quote to edit.
- Click Edit Quote from the drop down box next to the Applicant Name.
The Quote Summary page displays.

- To edit Account Information, such as name, address, or effective date, click Edit Account Information.
- To edit an existing coverage click the icon next to the appropriate coverage.
- To add a new coverage, click the Add button next to the coverage.

Note: To change only the deductible, use the drop down on this page to select the new deductible.

Important: Remember to click the save button after changes have been completed.

- Once all changes have been made and saved, click Back to Quote Summary Re-rate the quote by clicking Rate.
Withdraw a Quote

7. Withdrawing a quote

On the My Quotes page, locate the quote to withdraw.

- To withdraw a quote, click **Withdraw Quote** from the drop down box.
A pop up window displays.

- A reason for withdrawing the quote is required. **Select** the appropriate reason from the choices in the drop down menu which are:
  - Price
  - Coverage
  - Agency lost account
  - Coverage no longer needed
  - Refer to Field
  - Other
- Comments can also be added if necessary.
- Click Withdraw

⚠️ **Note:** only the following Special Characters a-z, A-Z, 0-9, space >,-!@#$%^&*()_+~={[]}|:;"'?/>.<, are **not** allowed to be typed, copied or pasted into the Comments box.

• Clicking on the **Envelope** will open an email to the agent.

⚠️ **Note:** If Withdraw Quote was accessed in error, click **Cancel**.
If Withdraw Quote was processed in error,

- Find account under the **Decline or Withdrawn or Expired** section on the My Quote page.
- Click **Re-activate** from the drop down box next to Applicant Name.
- You will be returned to the **Quote Summary** screen.