Travelers next generation small business quoting platform – 2nd Gen Travelers Express® for Master Pac℠ – is an evolution in productivity for endorsing small business policies.

**Easy navigation**

The system is intuitive; easy to navigate specifics of your endorsement.

**Efficient quote-to-issue**

You’ll know if your endorsement is acceptable automatically.

**Quote optional limits to your insured**

You can easily fill your insured’s needs by providing them with quote options.
Step 1: Getting started

Accessing 2nd Gen TravelersExpress for Master Pac via Agent HQ

- Open your Internet Browser and enter the web address: https://logon.travelers.com.
- Enter your secure User ID and Password. If you have trouble logging in, please call the Agency Help Desk at 800.842.2522.
- IENet can be accessed on the Small Business Home Page under Quote & Issue.
- Upon first entering IENet, your Producer Code and Office Code will automatically pre-fill on the Welcome Screen. If your agency currently uses more than one Producer Code, please choose the code applicable to the account you are endorsing.

Tip for Service Center Agents: you are not able to endorse 2nd Gen TravelersExpress for Master Pac policies issued under your Service Center code. Endorsement requests on Service Center accounts can be sent directly to: service.center@travelers.com

Step 2: Navigating the Policy Quoting Screens

- Select the Customer/Account tab from the IENet home page.

- On the left navigation bar select My Accounts for a listing of all accounts (by name) written under your producer code or select Policy Number or Account Number and key in the required information for the policy you’ll be endorsing. Click Select.

- From the Account Summary screen, highlight the Master Pac policy.
• From the **Transaction History** screen, choose **Change** from the transaction drop-down menu. Then click Go.

• Enter a Transaction Effective Date & Description of Change (example, “increase Business Personal Property limit”). Then click **Continue**.

Walk through the rating screens making the necessary policy changes

• On the **Policy Information** screen you can amend Legal Entity, Named Insured, Address, etc.

• On the **Loc/Bldg Detail** screen, click **Edit** to amend the Building and/or Business Personal Property fields (including the Construction Type, Number of Stories, Year of Construction, etc). Click **Add Location** or **Add Building** to add to the location list.

• From the **Policy Coverages** screen, click the **Find a Coverage** button to add optional coverages. Scroll through the list of Available Coverages or type in a key word to search.

• Once all changes are completed, click **Rate** on the Right **Actions** Menu.
Step 3: The Premium/Change Summary Screen

- After the endorsement is rated, you will land on the Premium/Change Summary screen. The pro-rated premium for the change transaction will appear at the top of the screen.

- Specifics of the change will be detailed in the Derived Change Wording section.

- A Quote Proposal and Rating worksheets can be retrieved from the right Actions menu.

**IMPORTANT** Tip: Referrals

*If a referral is required, you will see a message stating “This policy must be referred.”*

Clicking on the Referral Reasons link will guide you to the Referral Reasons screen. The Referral Reasons messaging lets you know the reason for underwriting review (In the below example, a referral is required due to the Employee dishonesty coverage).

- Clicking Refer Now will refer your quote to your Account Manager.

- A Memo screen will appear. Choose Endorsement Underwriter for the Send To field. Type any referral notes. The email address will pre-fill from the user ID.

- Click Send Memo and the referral will be sent for review. Your Account Manager will send a memo response with additional questions, or approval for you to issue.
Step 4: Navigating the Policy Issuance Screens

- On the Quote Summary screen, click the Proceed to Issue button or click Issue from the right Actions menu.

- Click the Issue button on the Issue Information screen

- You are returned to the Transaction History screen. A Transaction Sequence number is added to the grid for each transaction processed. The status will be updated to show Issued. Within 24 hours of issuance, you may pull the policy paper online. The insured's copy of the endorsement will be mailed to your agency's office within 3-5 business days.

**Important NOTE:**

If you do not intend to issue the change (for instance, you are providing an optional quote to the insured), then be sure to click the Purge button to delete the transaction.

Help Desk Assistance

We've embedded help tools right inside the navigation if you encounter any issues.

We encourage you to contact our Agency Help Desk. Help is a click away inside the rating screens to either access our Agency Help Desk by phone (800.842.2522), chat or email.
Leading Technology One Quote At A Time.

Contact your local Agency Automation Executive today to learn more.

Regularly scheduled Webinar classes offered.

On-site training available by individual request.