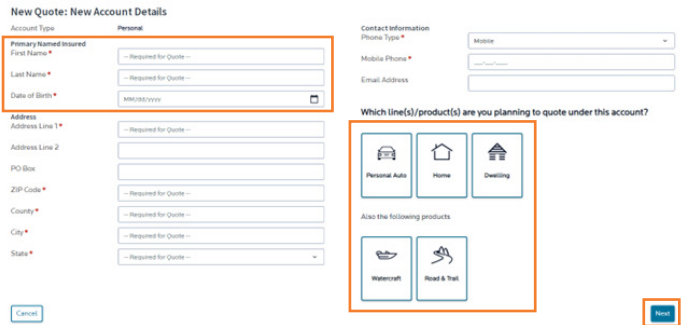


ProducerEngage New Navigation Flow

There are new account level and payment and document screens in ProducerEngage.

New Quote: Account Details

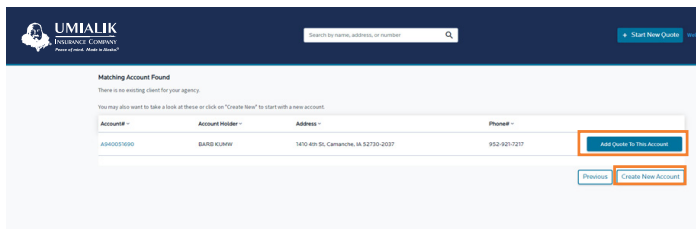


When starting a new quote, you will see the **New Quote: New Account Details** page.

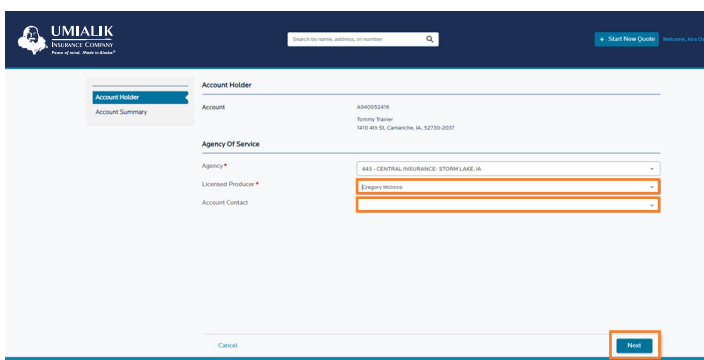
- Enter the **Primary Named Insured's contact information**.
- Select the **line of business / product**.
- Once the information has been entered, select the **Next** button.

Note: If a match is found, it will bring you to the Matching Account Found screen. If no match is found, you will see the Account Holder screen.

Matching Account Found



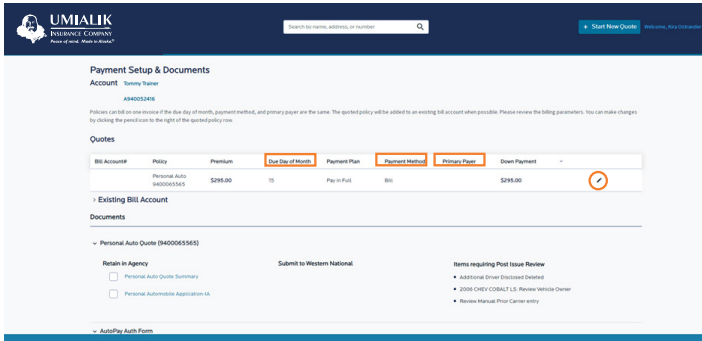
- If it's a match, select **Add Quote To This Account**.
- If it isn't a match, select **Create New Account**.



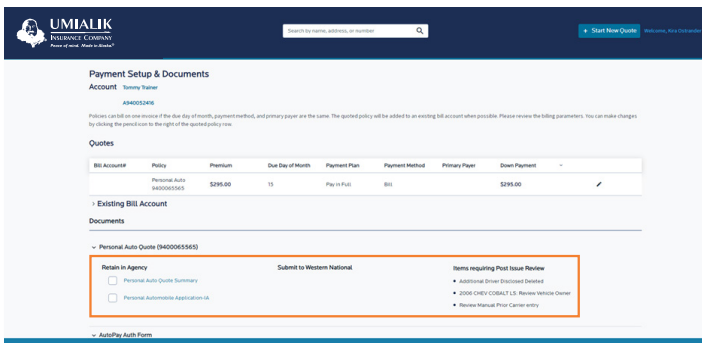
- Verify it is the correct **Agency**.
- Select the **Licensed Producer** and **Account Contact**.
- Select **Next**, which will bring you into the quote.

New Payments and Documents Pages

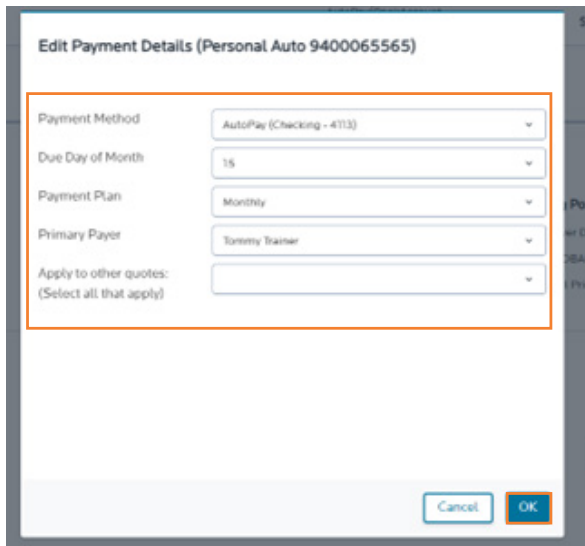
Payment Setup & Documents



- Quotes can be issued by setting up a payment plan, payment method, down payment amount, and due date on this page.
- To set up the payment for the policy, select the **pencil icon** next to the quote to update the billing parameters.



- You can print documents, including AutoPay Enrollment Form, and view items requiring post issuance review.



Choose the Following to Set Up Payment Details:

- **Choose Payment Method**
- **Due Day of Month** (prefills to policy effective date)
- **Payment Plan**
- **Primary Payer** (will be selected for you)
- **Apply to other quotes** (used for Home policies)
- Select **OK** to continue

Proceed to Issue Policy

- Scroll down to the bottom of the page.
- Select **Proceed to Issue**.

Pay & Issue - Down Payment (will not show for Mortgage Bill)

- Select **Pay & Issue** to make the down payment on the quote.

Down Payment Setup

- The payment amount will prefill with the **down payment amount**.
- Select the **Payment Method** to choose how you will make the payment.
- Next click **Pay & Issue**.
- This will bring you to the existing payment pages.

CustomerCare
 User: uaagent4wmi
 Site: Western National

ACH payment - payment verification

Denzel Washington
 2090 Lundy Ln
 Bettendorf, IA 52722-3998 Account: 00A940054517

bank account information

Name on account: Chase
 Account number: xxxxxxxxxxxx4113
 Routing number: xxxxxx0019
 Type: Consumer

payment information

Reference number: 49400074168000000
 Payment date: 03/21/2023
 Payment amount: \$ 80.66

Pending or Scheduled Payments

Reference Number	Payment Date	Status	Amount	Confirmation Number
49400073864000000	03/13/2023	In Progress	\$ 48.93	1340987
49400073984000000	03/17/2023	Scheduled	\$ 89.51	1341043

Cancel Payment Submit Payment

- The ACH screens will pop up, asking for payment verification. Choose **Submit Payment**.

CustomerCare
 User: uaagent4wmi
 Site: Western National

ACH payment - payment confirmation

Denzel Washington
 2090 Lundy Ln
 Bettendorf, IA 52722-3998 Account: 00A940054517
 A payment for \$ 80.66 has been scheduled for 03/21/2023 using Checking. The confirmation number is 1341063.

[Payment Detail - Print Version](#)

Continue

- This confirmation page will follow, and you can use the hyperlink **Payment Detail - Print Version** to open a copy of the receipt, which is shown below, and print it. Then choose **Continue**.

payment detail

Billie Eilish
 58 Charles St
 Council Bluffs, IA 51503-4959 Account: 00A940054458

The following is the detail for your online bill payment:

Status: Scheduled
 Payment Amount: \$99.85
 Scheduled For: 03/28/2023 12:00 A.M.
 Originator: Direct Payment
 Payment Method: Checking
 Bank Account Number: xxxxxxxxxxxx4113
 Confirmation Number: 1341124

Contact Us:

All Customers (Except Those in Alaska, Michigan and New York):
 (800) 352-2772 Monday to Friday - 7:30 a.m. to 6:30 p.m. CT

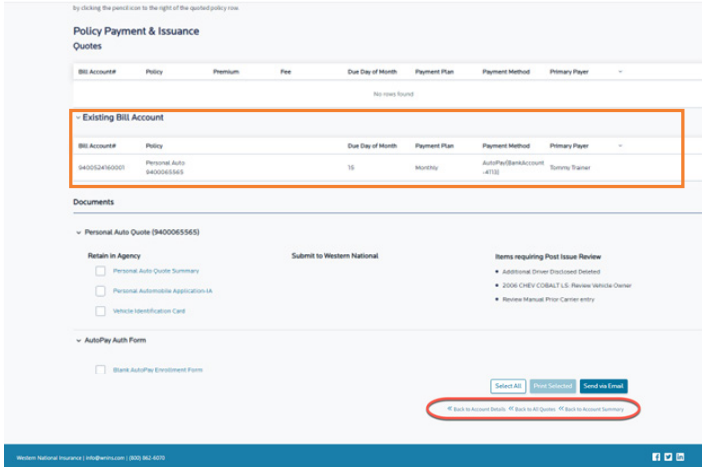
Alaska Customers:
 (800) 251-3563 Monday to Friday - 8:00 a.m. to 4:30 p.m. AKT

Or, you can reach our representatives at ContactMyAccount@wnins.com. For time-sensitive requests, we recommend you contact us by phone rather than by email.

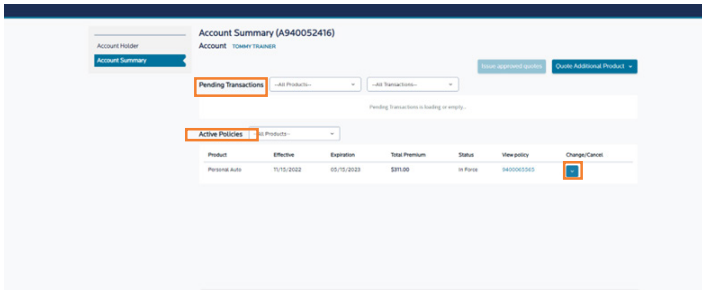
Western National Insurance Group
 P.O. Box 59184
 Minneapolis, MN 55459-0184
 www.wnins.com

Customers in Michigan and New York:
 Phone: (800) 888-1914 Monday - Friday 8:00 a.m. to 4:30 p.m. ET
 Email: www.mimillers.com/ContactUs.aspx
 Mail: Michigan Millers Insurance
 P.O. Box 30060
 Lansing, MI 48909-7560

Close



- Once the down payment has been made, you will see the **Payment Setup & Documents** page. However, the quote field will be blank as your policy has been issued. It will now show under **Existing Bill Account**.
- Below the new policy is the **Documents** section. There are documents available for printing, including ID Cards and the AutoPay Enrollment Form. If you would like to print all the documents listed, use the **Select All** button near the bottom of the page. If you only want to print one form, put a checkmark in the field next to the form name and select **Print Selected**.
- Also in the Documents section is the **Items requiring Post Issue Review** list for you to review what additional information is needed.
- When finished, you can click on Back to **Account Details**, **Back to All Quotes**, or **Back to Account Summary** at the bottom of the page.



- The **Account Summary** page will show all **Pending Transactions** and **Active Policies**. (It will show multiple policies in the future.)
- You can also start a **Change** or **Cancel** from the **Account Summary** page.