

US Auto Best Practices

Emailing Pictures

- Send one picture per email. Sometimes a server will drop the attachment because it exceeds size limitations. There is no way to know which servers do this so better to avoid the prospect altogether and just end one email.
- Use only JPEG formats. Do not imbed pictures into Microsoft Word (or other word processing) documents.
- Always put the policy number in the subject line and which number picture you are sending.
 - i.e. One the 1st email you would put in the subject line “ 29-12345 pic 1 of 4”;
 - On the second email you would put, “29-12345 pic 2 of 4”; etc.,...

Helpdesk Calls

- Always write down the name of the person you are speaking with. Please ask for first and last names. This helps eliminate confusion if subsequent phone calls are required by you or Travis Insurance Services Inc. regarding a particular issue.

Bank Draft Reports (BDR)

These reports are accessible through your agency's master code (the one ending in “01”). BDRs need to be kept for your records. Unfortunatley you can only access reports for the last 30 days. This means that you will need to file them.

Fortunately the reports come as PDF documents which are easily saved to a hard disk or a floppy for later reference. The best practice is to pull the reports through the US Auto system at least once a week.

- Log on to the US Auto system
- **CLICK “REPORTS”** and scroll down to the “Daily Bank Draft” option.
- Select the appropriate date for the report
- When the report comes up in Adobe Acrobat go the “File” menu and select “Save As”
- Save the report on your hard disk or a floppy disk. Be sure to include the date in the file name so you can easily find it later.
- If saving on a weekly basis then you'll need to repeat the previous steps for each report you want to save.

Missing Paperwork Reports (MPR)

MPRs need to be pulled at least twice a week (Monday and Thursday) in order to view the status of policies you have sent in to US Auto. It is the agent's responsibility to get the paperwork to US Auto. US Auto doesn't release commission until the policy is removed from the MPR. For a policy to be eligible for commission it must be off the Missing Paperwork Report within 45 days of the transaction. Otherwise US Auto will never release for that policy. This where you'll go to confirm whether or not US Auto has received your paperwork.

- Log on to the US Auto system
- **CLICK "REPORTS"** and scroll down to the "Missing Paperwork" option.
- Select the appropriate date for the report
- When the report comes up in Adobe Acrobat go the "File" menu and select "Save As"
- Save the report on your hard disk or a floppy disk. Be sure to include the date in the file name so you can easily find it later.
- If saving on a weekly basis then you'll need to repeat the previous steps for each report you want to save.

Retention

The best way to grow your book with US Auto is to keep you clients on the books for as long as possible. US Auto has designed their processes with this in mind. But there are some things you can do to help yourself in this area.

- Use the "Agent Event" report. This report shows who has canceled on a particular day. You can only go back 10-14 days so you need to download this report each day. The report has client's name addresses and phone numbers so you can contact them.