

Including a Broker Message With a Contract

When sending a contract to an underwriter for the first time, the broker message dialogue is shown after selecting recipients. This lets brokers add an informal accompanying message.

To send a message to multiple new underwriters, type it in the 'Shared Text' box and click 'Copy to all Recipients'. All recipients are ticked to receive the message, and the text is copied into their personal message field.

Click on the tick-box next to an underwriter's name to toggle whether they receive a message or not. You may message one, some, or all underwriters.

Each underwriter's personal message field can be uniquely composed and/or edited without affecting other messages. There is no need to use the 'Shared Text' box. **Please note** that applying shared text overwrites any existing text.

Each underwriter has unique 'Greeting' and 'Closing' fields located before and after their main message text field respectively to allow for easy personalisation. These are unaffected by the shared text field.

The screenshot shows a 'Show for Quote' window with a 'Carrier Selection > Show To Carriers' header. A 'Please Note' message states: 'To include a message with the contract, enter it in the fields below and tick the box to the left of the recipient's name. Leave blank to skip this step.' Below this is a 'Shared Text' section with a 'Copy To All Recipients' button. The 'Shared Text' box contains: 'This contract covers the scope of the risk. Any interest? Please let me know soonest. Yrs, Cayce.' Below the shared text is a list of underwriters. The first underwriter is 'Wantage Underwriting | ALL RISKS' with a checked checkbox, a 'Copy Shared Text' button, and a 'Customised' status. Their personal message field contains: 'Greeting', 'James, I'm sending you this as per our chat earlier. Hoping you'll take lead. This contract covers the scope of the risk. It's as I described it to you. Please let me know soonest. Yrs, Cayce.', and 'Closing'. The second underwriter is 'Messina Insurance Company | All Risks' with a checked checkbox, a 'Copy Shared Text' button, and a 'Greeting' field containing 'Hi Francis'. At the bottom are 'Back' and 'Proceed' buttons.

Broker messages are entirely optional. To send the contract without any message, simply leave the text fields blank and click 'Proceed'.

The 'Customised' status note indicates that this underwriter's message is not identical to the text in the 'Shared Text' box.

Click on 'Copy Shared Text' to overwrite an underwriter's message box with the contents of the 'Shared Text' box.

When ready, click 'Proceed' to send the contract.