



Getting Started with Transformation Station!

- 1) Make sure the agency code for the company is entered in the Company/Agency Codes section. No hyphens or spaces, please. If there are office branches using the same system, make sure their correct codes are entered the same way in the BRANCH section.

The screenshot shows the 'COMPANIES' window in the CWG Transformation Station software. The window title is 'Company: Continental Western Group'. The menu bar includes 'File', 'Edit', 'Options', 'Window', and 'Help'. The toolbar contains various icons for file operations and navigation. Below the toolbar are buttons for '<< Previous <<', '>> Next >>', 'Add', 'Delete', and 'Home Base'. The main area displays a table of companies with columns for 'Company #', 'Name', and 'Street'. The 'CWG' entry is selected, and a context menu is open over it, listing options such as 'File Detail', 'Archives', 'Links', 'Listings Menu', 'Company Address', 'Commission Defaults', 'Call History', 'Agency Codes', 'Print a Barcode', 'Disbursement View', 'Create Label', 'Name Search', and 'Invoice Search'. The 'Agency Codes' option is highlighted. To the right of the table, there is a 'Continental Western Group' panel with fields for 'Bus' and 'Fax'.

Company #	Name	Street
CRU	Crum & Forster Insurance	299 Madison Avenue
CUI	Commercial Union Insurance	1 Constitution Way
CUR	Prospect's Current Company	
CWG	Continental Western Group	
DAI	Dairyland	1200 M...
FFI	Fireman's Fund Insurance	100 Smi...
GAI	Great American Insurance Co.	P.O. Bo...
GCI	General Casualty Insurance	1 Gener...
HAR	Hartford Insurance Company	Hartford
HES	Hester Insurance	698 Sou...
HIC	Hanover Insurance Company	100 Nat...
HS	House Account	200 App...
KEM	Kemper Insurance Group	Kemper
MDC	Maryland Casualty	3510 Ke...
MIG	Merchants Insurance Group	P.O. Bo...
NEW	New Pei	756 Oce...
NDR	Northbrook Prop. & Casualty	51 West...
PEI	Preferred Employers Insurance	1455 Fr...
PEK	Pekin Insurance Company	2505 Co...
PEN	Pennsylvania National Ins. Co.	1900 De...
PHX	Phoenix Insurance	3158 N. Tanque Verde Drive
PRO	Progressive	1500 West Erie Avenue

Company Agency Codes

Company Code: Company Name:

Transmitting

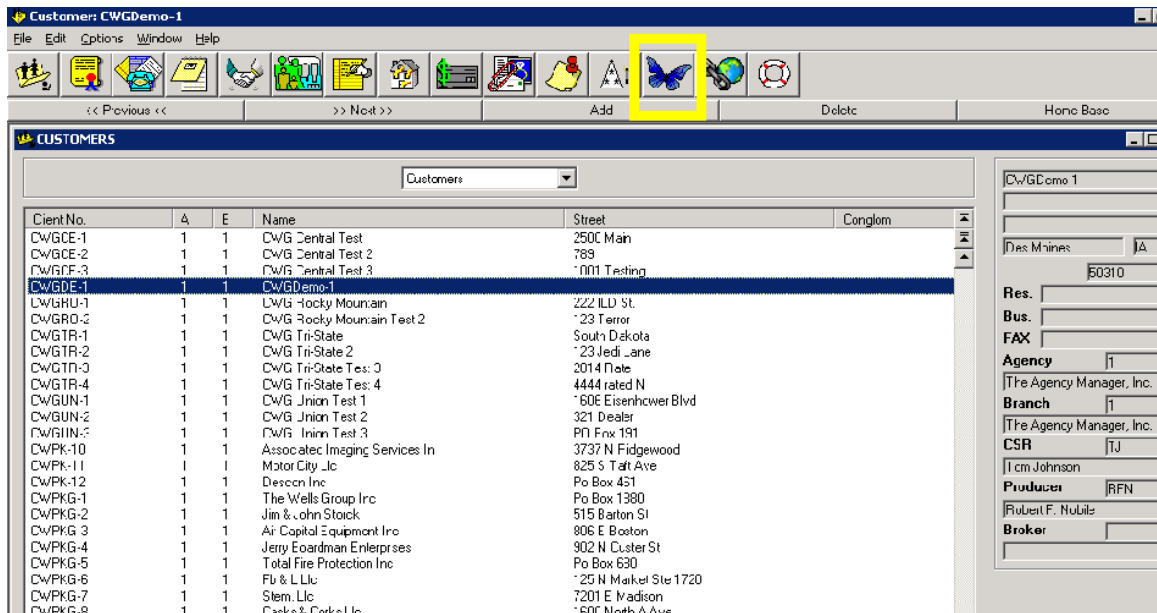
Print/Transmit by Agency Print/Transmit by Branch

Agency/Branch Information

Ag	Name	Code	Password	Contract	
1	The Agency Manager, Inc.	9518		9518	▲
					▼
					▲
					▼
					▲
					▼

Code: Password: Contract:

2) In Customer List, select the customer and click the Butterfly.



In the next screen click the HOUSE in top left corner under FILES or click FILES. Run the Account Update Wizard. Highlight all company transactions and enter ICO (Issuing Company Code), then click OK and click FINISH.

Real-Time Interface

File Help

Account Update Wizard... 54679

Real-Time Configuration...
Local Security Products...
LOB Codes Setup...
Alerts!
Exit

LOB: Worker's Compensation
Continental Western Website
Company Websites
WC5054679
Effective: 08/01/2008
Expiration: 08/01/2009

Inquiry Options
 Claim Inquiry
 Billing Inquiry
 Policy Inquiry

Transaction Options
 Rate
 1st Notice of Loss
 Quote
[See All](#)

Attachments Options

ID	Name

Open Closed All

Loss Date	Type	Description	Company Claim #
08/04/2008	WORKLOSS		40000050 ...

Enter Company Codes

Product	Company Code
Continental Western Group GL-TEST	CWG
Continental Western Group Work Comp-PROD	CWG
Continental Western Group Work Comp-TEST	CWG
Continental Western Inquiry	CWG
Continental Western Website	CWG
CWG First Notice of Loss	
CWG Inquiry- TEST	CWG
Preferred Employers Ins. Co. Website	PEI
Preferred Employers Ins. Co. Work Comp - PROD	PEI
Preferred Employers Ins. Co. Work Comp - Test	PEI
Riverport eTools	RIV
Riverport Inquiry-TEST	RIV
Union Standard Insurance Group View	USG
Union Standard Insurance Group Website	USG

Find Code... **Enter Code...** Remove Code Finish

Enter Company Code

Type Company Code(s) assigned to product(s).
Separate multiple codes with a semi-colon(;).

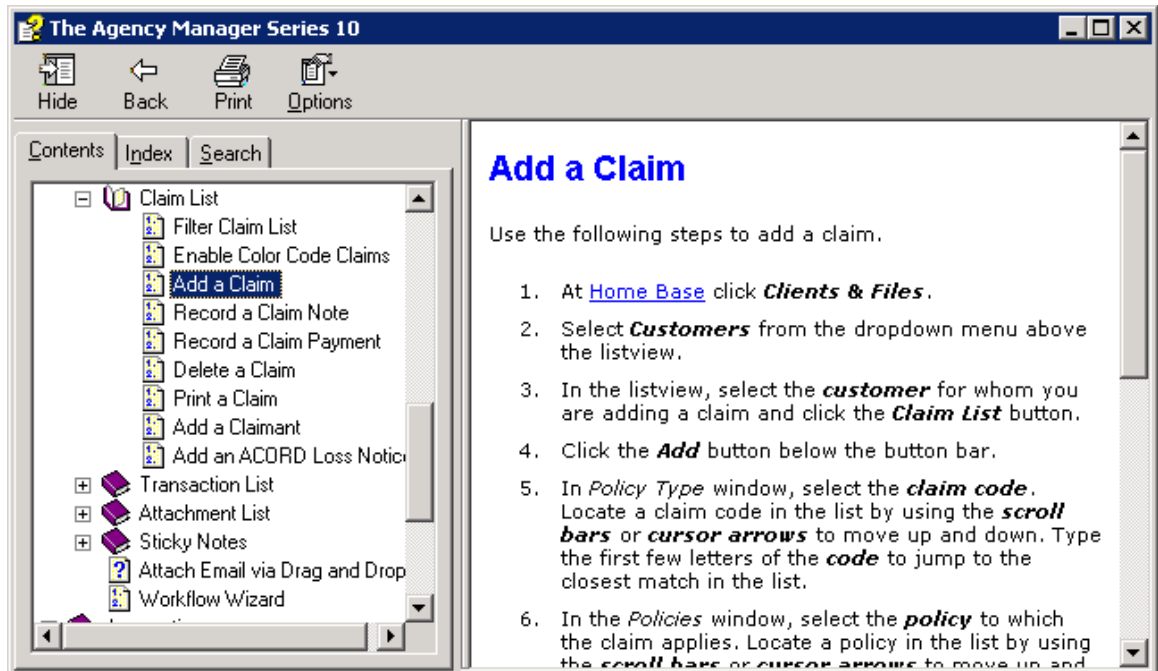
NOTE: Apostrophes are not valid in company codes.

OK Cancel

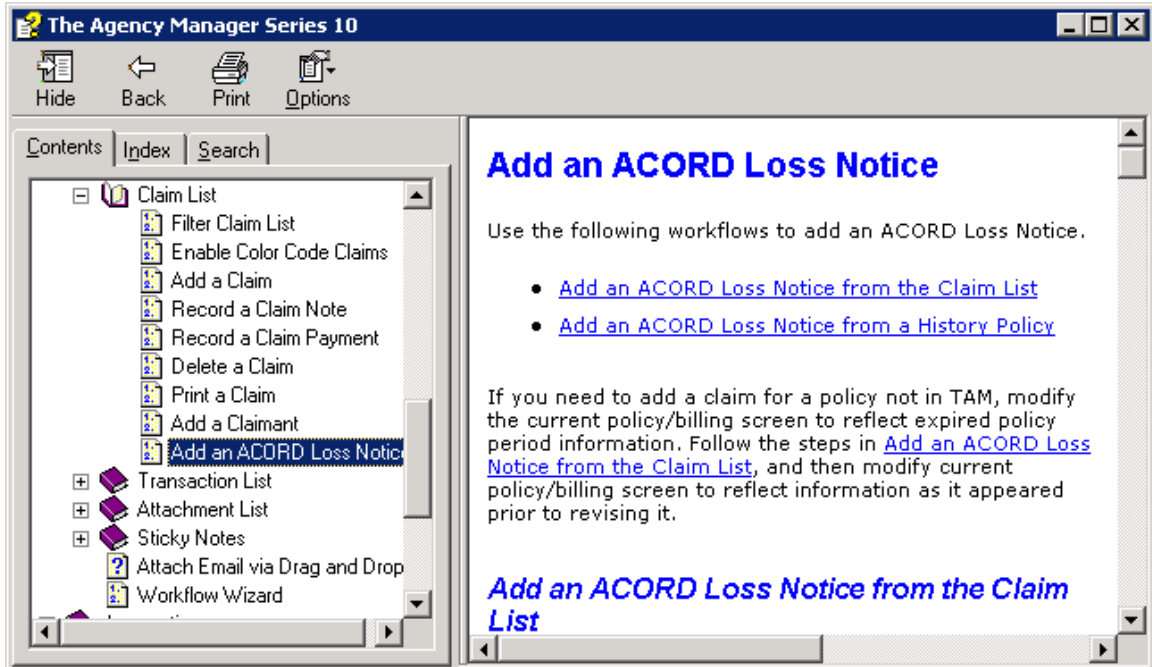
CWG

When submitting a FNOL from TAM:

1) When submitting a First Notice of Loss (FNOL), you should first create a claim for the policy based on the loss information. Please refer to TAM help to learn how to create a claim.



2) Once the claim is created, add an ACORD Loss Notice to the claim. To learn how to create an ACORD Loss Notice, refer to TAM help.



- 3) *After the claim and the loss notice has been created, click the Butterfly.*
- 4) *In the real-time screen, select “First Notice of Loss” and select the claim from the list of claims at the bottom of the screen.*

Real-Time Interface

File Help

USG Inquiry CAA4304887-10 Go!


USG Inquiry

Test
Test
Home:
Work:

LOB: Business Owners Policy

[BMAG Portal](#)
[Company Websites](#)

CAA4304887-10
Effective: 09/08/2008
Expiration: 09/08/2009




Inquiry Options

Claim Inquiry
 Billing Inquiry
 Policy Inquiry

Transaction Options

Rate
 1st Notice of Loss
 Quote

[See All](#) 

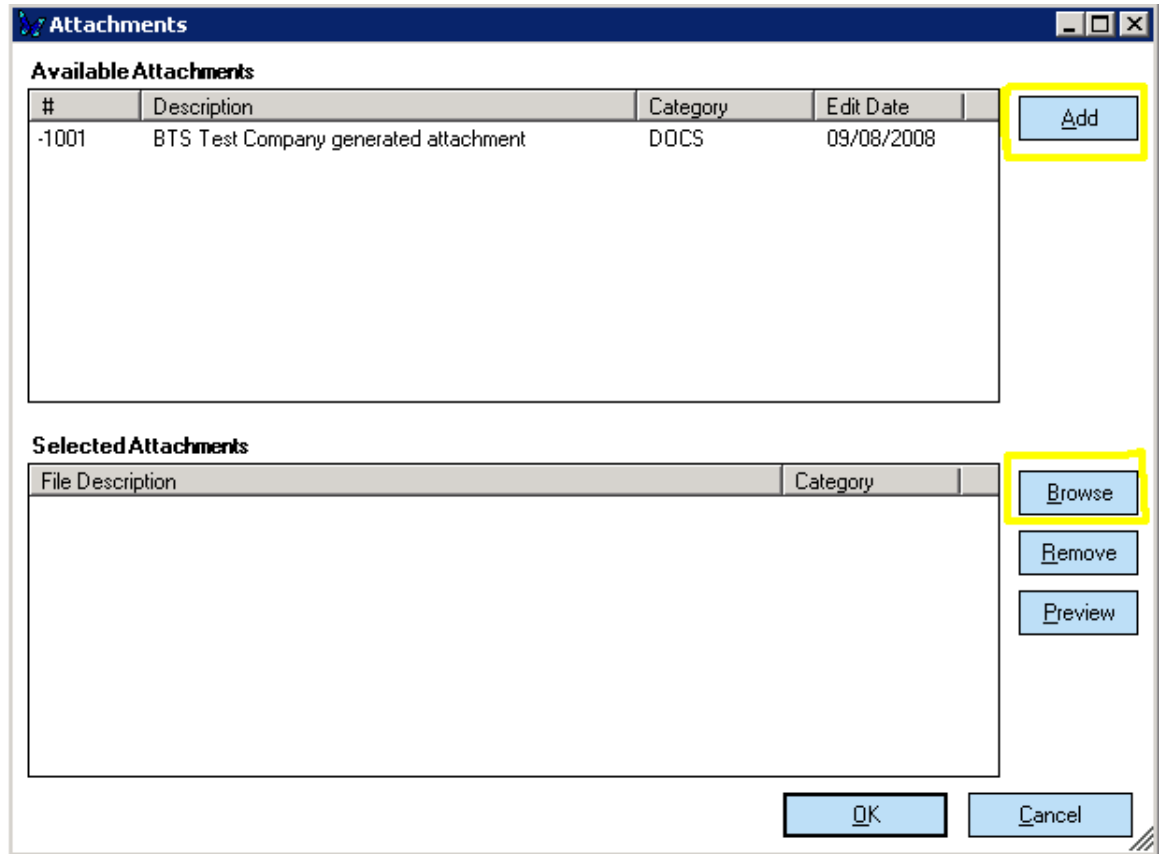
Attachments [Options](#)

ID	Name
<input type="checkbox"/> BTS	Berkley First Notice of Loss - Dev
<input checked="" type="checkbox"/> C...	CWG First Notice of Loss - TEST
<input type="checkbox"/> RIV	Berkley First Notice of Loss - Test
<input type="checkbox"/> RIV	Berkley First Notice of Loss - Int
<input type="checkbox"/> USG	USG First Notice of Loss - TEST

Open Closed All

Loss Date	Type	Description	Company Claim #
09/08/2008	AUTOLOSS	Backed into another car.	100000208 ...
11/12/2008	AUTOLOSS		
11/13/2008	AUTOLOSS	Test 2.	

5) To send attachments along with the loss notice, click “Attachments”. In the “Attachments” screen, select a document from the available documents and click “Add” or click browse to select a document from a location on your computer. Selected attachments should appear in the “Selected Attachments” section of the screen. When done, click OK.



- 6) Click "Go" in the real time screen.
- 7) After a few seconds, you will see a comment box with the claim number within the comment.
- 8) Click "OK".

Service Inquiries:

For all service inquiries performed such as checking Billing Status, Claim Inquiries, Policy Inquiries (Dec Pages), FNOL, Endorsement Bridge, Loss Runs, Website Sign-on, this is what you do, **once** all tasks are performed above in the 3 steps listed above.

Highlight the customer and click the Butterfly.

The screenshot shows a software application window titled "Customer: David Willey". The interface includes a menu bar (File, Edit, Options, Window, Help), a toolbar with various icons (Clients, Policies, Activity, Memo, Contacts, Info, Notes, Claims, Invoices, Attach, Sticky, Wizard, Real-Time, Links, Help), and a main workspace. The main workspace is divided into a table of customers and a detail panel on the right. The "Real-Time" icon in the toolbar is highlighted with a yellow circle. The "WILLDA1" customer record is highlighted in the table. The detail panel on the right shows information for "David Willey", including address, phone number, and agency details.

Client No.	Name	Street
DAVIHE1	Herbert C. Davis	15923 Fairchild Avenue
DESIG-1	Design Right Printing	1892 Industrial Court
DOUGL-1	Douglas & Douglas Incorporated	1521 Vollmer Road
GALAX-1	Galaxy Travel	19830 Governors Highway
GASTME1	Mel Gaston	1158 Vaughndale
HILLW11	William Hillman	4221 Natalie Lane
ILGAT-1	David M. Willey	643 S. Crawford Rd
JANSDE1	Denny Janssen	2145 Evergreen Drive
KOHLR-1	Roy & David Kohler	R.R. 3, Monee-Manhattan Rd
MATURD1	Robert & Kathryn Matusik	125 W. Oak Street
MCNUL-1	McNulty Property Management	15932 Cicero Ave.
NEUMA-1	Neumann's Barber Shop	3350 Joe Orr Road
OAKPL-1	Oak Plumbing & Heating, Inc.	14990 Ridgeland Avenue
OMALSE1	Sean M. O'Malley	4352 Kilborn Avenue
PETRF11	Frank X. Petri, Jr.	119 Dwellington Dr E
PHELCH1	Charles Phelps	2520 Woodward Avenue
REMCO-1	Remco Vending, Inc.	P.O. Box 313
SMITKE1	Keith Smith	18537 Chestnut Street
SMITKE2	Kelly Smith	5442 South Siely, Apt# 205
STATTE1	Test StateAuto	
TEMPL-1	Temple Steel	9381 Temple Dr.
TERRE-1	Terrell, Turner and Jones, Inc	1211 State Street
TEST-01	test-Chubb	
TEST2-1	test2	123 Main st
TYSON-1	Tyson and Associates Transport	2700 Bond Street
UNITE-1	United Technologies Corp.	2100 Carrier Ave.
WEBER11	Richard J. & Sheila Weber	3630 Wentworth Avenue
WILLDA1	David Willey	44 Maysville St
WILLE-1	Willey Agency	643 S. Crawford Rd

*Select the policy from the list below and place a dot in the available inquiries for that carrier, then click **GO***

Progressive-Billing.avi - Camtasia Player

GoToMeeting Viewer

Now viewing phil's screen

Real-Time Interface

Carrier List

Inquiry Options

- Claim Inquiry
- Billing Inquiry
- Policy Inquiry

Transaction Options

- Rate
- Make Payment

See All

Evaluation Dates

07/05/2007 to 07/05/2007

52305395-7
Effective: 08/02/2007
Expiration: 02/02/2008

Current History

#	Type	Policy #	Expires	ICO	PR	D	B
-1001	AUTO	52305395-7	02/02/2008	PRO	AV	2	D

MetaFrame XP

OFF AIR

u will need a

If you have this

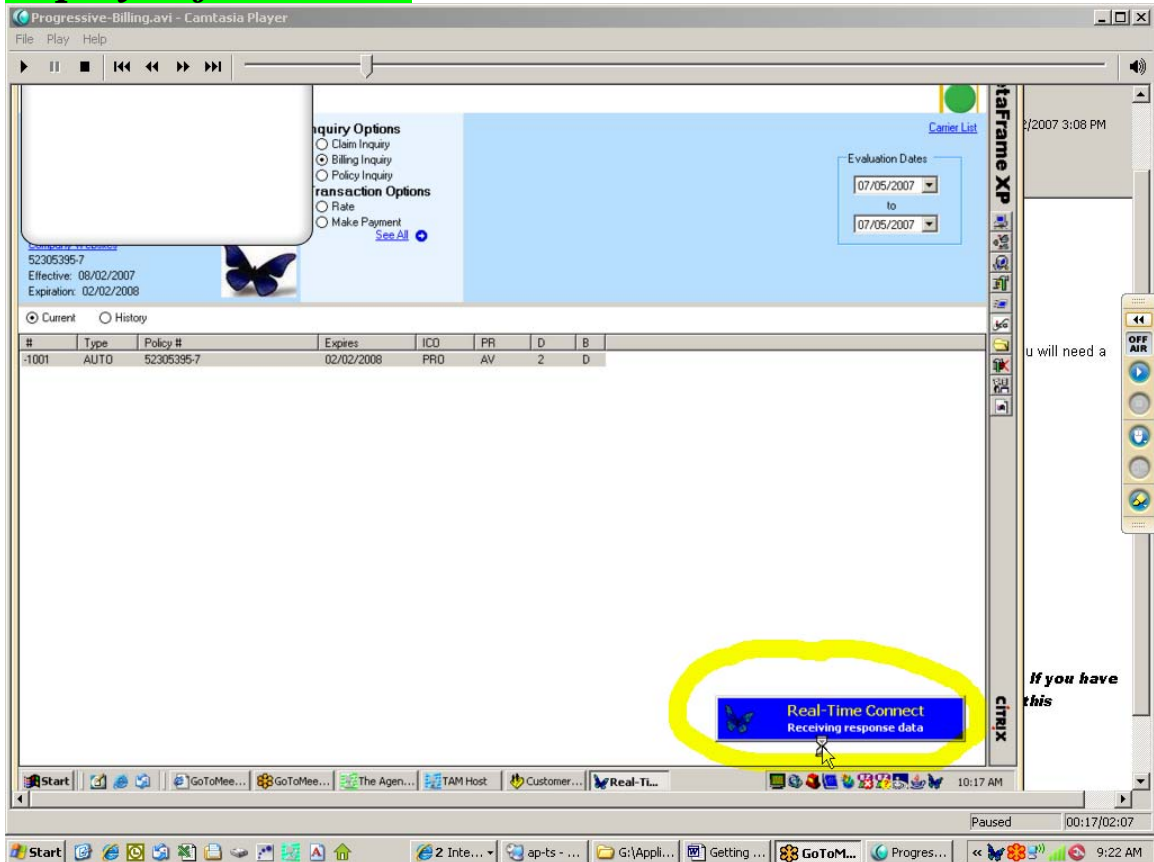
Paused 00:05|02:07

Start

2 Inte... ap-ts... G:\Appli... Getting... GoToM... Progres...

9:19 AM

Within 15-30 seconds, the agency code is verified, the credentials for the CSR are verified and the inquiry is displayed for review.



When session is closed, agent will click OK for document to attach to customer (If carrier provides Routed Attachment). Agent will click the noted document over to the middle section and click the category field to name the document being attached. After document attaches, agent will enter and close Activity.

If company does not provide an attachment of Dec Page, Claim Detail, Billing Inquiry; CSR should e-mail the viewed items to themselves so they can attach to customer in TAM.