

CARL

COMMERCIAL LINES



APPULATE

The Insurance Automation Company

Myron Steves has partnered with Appulate to make our Commercial Lines quoting process easy for you, our valued agents! In this document, learn about Appulate, what the benefits are, how to set it up and how to use it.

MYRON STEVES

Who is Appulate?

Appulate is empowering agents! More than 30,000 agencies are a part of Appulate's ProducerConnect™ to increase efficiency by eliminating redundant keystrokes in the submission and quoting process. Agents use Appulate to move ACORD and other data from their management systems to the carriers they do business with AND they use Appulate to gain access to new markets, products and programs. Appulate is so confident in its ability to streamline the agent's workflow and help them grow that we give agents immediate access to ProducerConnect™ for zero cost.

Why have we partnered with Appulate?

We are always looking for new ways to make it easier for our retail agents to do business with us. Appulate helps our agents send application data to CARL without duplicating any keystrokes. This bridging of data into CARL directly from an ACORD PDF or your agency management system expedites the submission and quoting process.

What is in it for me?

Commercial Lines submissions and quoting with Myron Steves have never been easier than now with the help of Appulate. As an agent, you can upload your completed ACORD data from an ACORD PDF or your agency management system into CARL, without rekeying information!

This is a free service for you to use when submitting to Myron Steves.

Agent Benefits

- Works with any agency management system or a saved ACORD PDF
- Reduces data entry time
- Expedites the submission process

How to Start a Submission

Starting with a completed ACORD form

1. Go to your completed ACORD form (ACORD PDF or in your management system).
2. [Uplink™](#) your ACORD form, meaning 'Print' the ACORD form but instead of choosing your office printer, choose the [Appulate Uplink™](#) printer option. See the section called "Setup" below for how to install [Uplink™](#).
3. Print.
4. Confirm your Appulate credentials.
5. Select the radio button for "Directly to your Market(s)" and check "Myron Steves." Click Send.
6. You will be directed into CARL. If you are already logged into CARL, it will take you straight to your application in the quoting process.
7. If you are not logged in you will be directed to the CARL login page, where you will log in.
8. Once you are logged in and viewing your application, review all information to ensure it pulled in correctly. The information must be reviewed for accuracy. Occasionally, Appulate cannot recognize certain data, so it will not be able bring it over or can bring it over incorrectly.
9. Fill in any missing data.
10. Once data is reviewed, you will resume the regular CARL quoting process.

Starting from inside CARL

1. From the Quick Shortcuts menu, click on the Quote button.
2. In the Product dropdown, select GL and/or Property.
3. A new field will appear just below Product called "Upload ACORD".
4. Click on Upload File and find the ACORD application from your files.
5. You will be transferred to a pre-filled quote page.
6. The information must be reviewed for accuracy. Occasionally, Appulate cannot recognize certain data, so it will not be able bring it over.
7. Once data is reviewed, you will resume the regular CARL quoting process.

Please email support@myronsteves.com for more information. For assistance with a submission or for a status update on a quote, please contact the assigned underwriter or call 800.635.4742 Ext.8303.

Request a Binder

Once your application is in the quoted stage (the status will update in CARL), you can request to bind. Send your signed application and any required forms to CLbinders@myronsteves.com and request to bind. Eventually agents will have the ability to request to bind from inside CARL; we will notify you once this functionality is available.

Alternate Quotes

If updates need to be made to your quote, contact the underwriter that sent your quote.

Setup

If you are an existing Appulate user, Myron Steves was added to your list of selected markets.

If you have not used Appulate before, for your convenience an account has already been setup for you. To log in, go to [Appulate.com](https://appulate.com) and click on the "Forgot Password?" link to create credentials.

Download Uplink™- [Uplink™](#) is the tool that enables you to bridge ACORD data from your management system or ACORD PDF into Appulate so that you don't have to rekey the data. [Uplink™](#) must be downloaded onto your computer first.

1. [Log in to Appulate](#).
2. Click on Tools.
3. Choose [Appulate Uplink™](#).
4. Choose your management system from the dropdown menu.
5. Click on Download Appulate Uplink™ Driver.
6. Follow the prompts to install.
7. Once installed, Appulate Uplink™ will be listed as one of your printers.

Settings

Appulate UI vs CarrierDirect:

Depending on your settings, you will experience one of two possible workflows - one that bypasses Appulate's main interface and one that takes you through the Appulate interface.

If you are using Appulate just for Myron Steves or for markets with a similar workflow, you may want to have your Uplink™ settings set to Carrier Direct for a more streamlined workflow. This setting was chosen for you if Myron Steves created your Account in Appulate or if you already had an Appulate account and are using it to submit to markets with a similar workflow.

The other workflow is if your settings are set to Appulate UI meaning that once you print your ACORD form to the Appulate Uplink™ Printer option and confirm your Appulate credentials you will land in Appulate first. This may have been a setting that was selected for you or by you when your account was created in Appulate.

This is a simple setting that can be changed, so if you don't like your current workflow, log into Appulate.com, go to setup and settings, scroll down to Uplink™ Setting and either choose the carrier direct option to bypass Appulate or choose Appulate UI to first stop in Appulate for your submission.

Help

Please email support@myronsteves.com for more information. For assistance with a submission or for a status update on a quote, please contact the assigned underwriter or call 800.635.4742 Ext.8303.

You may email support@appulate.com for any technical issues.

FAQ

Q: How much does the service cost?

A: We have partnered with Appulate, therefore it is absolutely free for our agents to use Appulate to submit to Myron Steves.

Q: How can I reset my Appulate credentials?

A: Go to appulate.com/sign-in and click on the "Forgot password?" link. You will be asked to enter your email address and will receive an email to create a new password.

Q: Who is the admin on my account?

A: An Appulate Admin has control of settings, is responsible for adding users and has other account privileges. If an Appulate account was created for your agency, the first person added to the account was named as the admin. If your agency created an account, the person to create the account is an admin.

If you do not know the admin and need to be added as a user, you may go through the account setup process and the system will alert your admin to add you as a user.

There can be more than one admin and admins can be changed. The admin has the right to change the user role for any user.

Q: Can I add and deactivate users?

A: Yes, an admin can add and deactivate users in Appulate under "Setup" and "Users".

Q: I am already using Appulate for another market. How do I access all of my markets?

A: You must be logged into Appulate.com and not a company specific URL (i.e. don't log into myronsteves.appulate.com).

Each agency has one Appulate account and from that account, you may work with all of your markets. To add or remove markets go to the "Markets" tab at the top of the page. Under "Selected" are all of the markets selected for your agency to work with in Appulate. You may remove a market simply by clicking on the unselect button on the far-right of their name. To add a market, go to the "Available" tab, locate the market and click the plus sign or select icon.

The list of selected markets applies to your entire account. Meaning that if you add a market, other users tied to your account will have it as their selected market as well.

Q: Why is Myron Steves not showing up as a market I can submit to?

A: It may have been removed. For information on how to add it, see answer above.

Q: Why is the Uplink™ download not working?

A: Microsoft Outlook should be closed during the installation process of Uplink™.

Users should have admin capabilities on the pc where the installation is taking place. If not, contact someone within your organization who has admin privilege.

If you run into any issues, please contact, support@appulate.com.