



## **MI Comparative Rater**

### **What's New in Version 3.0?**

#### **All-New Integrated Workflow**

Version 3.0 offers a more intuitive workflow to accommodate the painless ordering and integration of Insurance Scores, MVRs, and Claims-Loss History reports from multiple third-party sources. With this innovative functionality, agents using MI no longer need to visit multiple websites to get an accurate comparison of their personal lines markets. Find an up to date list of carriers utilizing this workflow at [www.mi-assistant.com](http://www.mi-assistant.com). Select Products and Solutions, For Agents, and then MI Third Party Report Ordering. To become a ChoicePoint customer, visit [www.cplink2.com](http://www.cplink2.com) and complete the form.

#### **Improved Integration with Applied System's TAM products**

Version 3.0 delivers a more complete and accurate integration of Auto & Homeowners data than ever before with TAM. Working in cooperation with Applied Systems, TAM users will benefit greatly with integration of literally hundreds of data fields. More than 95% of fields will now be transferred between TAM and MI. This will greatly reduce the time needed to re-quote business of previously stored records in TAM's Client or Prospects database.

#### **More Guaranteed Rates than ever before!**

The Guaranteed Rates program is bigger and better than ever! With Guaranteed Rates, agents are ensured that a rate produced by the MI Comparative Rater is accurate. With the cooperation of MI's Carrier Partners, agents no longer need to re-enter information into proprietary

websites to feel comfortable giving a quote to a prospect.

Guaranteed Rates are available for:

**ACUITY** in IA, IL, MN, & WI for Auto & Home; in IA & WI for Non-Standard

**Bristol West** in WI for Auto

**Dairyland (Sentry) Insurance** in IA, IL, MN & WI for Auto

**Farmers Home Group** in MN for Home

**General Casualty** in IA, IL & WI for Auto, Home & Non-Standard

**Pekin** in IA, IL, IN, & WI for Auto & Home

**SECURA** in IA, IN, MN, & WI for Auto & Home

**West Bend Mutual** in IA, IL, IN, MN, & WI for Auto & Home

## **MI Management System Training Center Classes**

MI-Assistant now offers courses on three levels to allow the user to get the most out of your MI Management System! Enrollment is open to all, for one, two, or all three levels. Simply select from the choices below

#### **Basic System Overview-Level 1**

Course Length: 1 Day | Course Cost: \$75

Course Description: Troubleshooting/Answers to user questions, Basic system overview including: Clients, Applications/Forms, Locaters, Memos, Tranlogs, Imaging/Efiling, and Integration. Lunch provided.

#### **Marketing & Policy Accounting-Level 2**

Course Length: 1 Day | Course Cost: \$75

Course Description: Marketing, Reports, Tasks, Policy Accounting including: Direct Bill and Agency Bill. Lunch provided.

#### **Accounting Integration-Level 3**

Course Length: 1 Day | Course Cost: \$75

Course Description: Commission Reconciliation, Getting Started with Accounting including: Setting beginning balances, Setting up QuickBooks Company, and Integration with QuickBooks. QuickBooks Overview including Check Writing, Deposits, Journal Entries and Financial Statements are also covered. Lunch provided.

Email [trainings@mi-assistant.com](mailto:trainings@mi-assistant.com) for registration information.

## **MarketLink**

*MarketLink is a new set of products and services that will link from MI Comparative Rater. You can easily obtain new agency services including CE courses, property photo services, and computer consulting. Agencies seeking to diversify their product offerings, generate new revenue, or obtain new services, will immediately take advantage of this absolutely free service from MI.*

*Here's just a few of the Service Providers for MarketLink:*

**PC Solutions** (Technology Services Provider)

**UPAC** (Premium Finance)

**Advantage Information Systems**

(Agency Automation)

**MexiPass Global Insurance** (International insurance and Risk Management Services)

**QuickFile** (Management Systems)

## **Helpful Hints**

### **Your Monthly Agency Bill**

*MI-Assistant sends your statement on the 15<sup>th</sup> of every month prior to that month's service. Your bill is due on the first of every month.*

*To see your account activity, visit: <http://support.mi-assistant.com>, select Support Center then Account Summary.*

### **From Customer Support**

#### **Have you noticed?**

*Your calls are very important to MI-Assistant and the efficiency of your agency. That's why MI's Customer Service team takes pride in knowing they can provide you with virtually immediate assistance in answering your questions when taking your call. Our technicians strive to answer every call without having you wait!*

*According to Jeff Kite, manager of customer service, "2004 has started off very well for the Customer Service Department at MI-Assistant. Agents should be talking to a customer service team member more frequently and agencies should be getting their problems resolved much quicker than ever before. All of these improvements have been attributed to a variety of internal process improvements and more training of employees in the department on both the rating and management system programs. Our team is outstanding."*

*Jeff gives some pointers to faster service:*

*"First off, when placing a call for support, use the call menu instead of experiencing a delay when transferring to an operator or pressing 0. Virtually all callers receive immediate assistance from a team member when using the call menu. After dialing 715.287.4262, press 1 for product support, 2 for sales, or 3 for questions on your agency statement or to make changes to your account."*

*"Secondly, search our website for immediate answers to questions like: How much is my bill? When did I make my last payment? How do I add a user to my management system? What information was in the last newsletter? Can I add a company to my rater? Visit [www.mi-assistant.com](http://www.mi-assistant.com) and select the Support Center.*

*"Finally, it is very important to have your account code ready when calling in for service. You can find your account code next to MI-Assistant Rating at the top of your rater."*

*If you have any suggestions or comments for customer service, please email [support@mi-assistant.com](mailto:support@mi-assistant.com).*