SIS WebLink and Westfield Insurance

WESTFIELD INSURANCE
Sharing Knowledge. Building Trust.®

Save time and money, with no extra cost to your agency.
Provide superior customer service with one-click customer inquiry.

All of this is possible with Westfield and SIS WebLink.

AVAILABLE TRANSACTIONS

You can perform these transactions through your SIS management system, without having to remember your Westfield username and password through the SIS WebLink interface:

- Billing inquiry
- Claims inquiry and loss runs
- Policy Inquiry
- Website Sign On

GET A NON-EXPIRING USERNAME FOR REAL TIME

We now offer non-expiring usernames and passwords for use in Real Time transactions from your agency management system. This eliminates your need for a password when you enter Westfield's web site through your management system. To get a non-expiring username, please send a request by e-mail or fax and note that you are specifically requesting a non-expiring username for Real Time.

E-mail: agencyhelp@westfieldgrp.com
Fax: 330.887.7001

EASY SETUP INSTRUCTIONS

Within your SIS PARTNER management system, you can access SIS WebLink and the SIS password management feature from the following locations:

- Anywhere you see the Westfield Insurance icon, right click on it. Choose **WebLink** and select the available function you want to perform.

- Within the policy folder, click on **Policy Action, WebLink.**

- Within the Policies tab of the Client Folder, right click on the policy and choose **Policy Action, WebLink.**

To access Westfield Billing Inquiry through SIS WebLink, select **BillingDetail**. To access Claims and Loss Run Inquiry, choose **ClaimsDetail**.

NOTE: The first time you attempt to use WebLink with Westfield, you will need to enter your username and password.

How your agency will benefit

WHAT COULD YOUR AGENCY SAVE?

- Inquiry transactions through your SIS management system can cut the time it takes to perform your most common customer service tasks by over 75%!

- Savings comes from not having to open your browser, navigate to the carrier site, enter your username and password and search for your content. SIS WebLink does all the work for you!

Check out the real time cost savings calculator on Agent's Web Passport to personalize the cost savings to your agency. Located under the Resources tab, click on "Real Time Cost Savings Calculator." See the example below.

Savings Per Month		
	Users	**Inquiry**
Jan	2	$126
Feb	3	$253
Mar	5	$379
Apr	6	$430
May	6	$480
Jun	7	$531
Jul	7	$556
Aug	8	$581
Sept	8	$607
Oct	8	$632
Nov	9	$657
Dec	9	$683
Totals		$5,915

Agency Information

Full CSR cost/hr	$26
Inquiry Transactions per month/CSR	70
Average Inquiry time via company site	3 min
Average Inquiry Time via Real-Time	0.5 min

Enter your agency's information here

Year One Planned Users

Q1 Users	5
Q2 Users	2
Q3 Users	1
Q4 Users	1
Total Users	9

How quickly will your agency be able to add new users?

Savings per transaction

Inquiry $1.08

Total Savings Year 1 $5,915