

# Westfield Bank Premium Finance Tips

---

As a valued customer, Westfield Bank has created a series of useful tips that may save you valuable time. We hope that this Information will make it easier to do business with us, and most importantly, your customers.



For your convenience, you can contact Westfield Bank's Premium Finance team for assistance at [premiumfinance@westfieldgrp.com](mailto:premiumfinance@westfieldgrp.com) or **1.800.368.8930**.

## **Editing a quote in PBS:**

### ***Quote Editing:***

A quote will lock once a finance agreement is generated. However, simply copy the quote by searching for the existing quote and then click on the icon that looks like two overlapping pages to the right of the listing. You can now make changes to the new quote.

### ***Renewal Simplicity:***

Simply search for the prior year's quote and use the copy feature above to create a new quote. Edit effective date(s), premium(s), etc. and save renewal quote with ease.

## **Additional Premium Endorsements:**

Select **Quoting**, then **New AP Quote** and simply type in the client's name or the 5 digit account number (i.e. 12345 of account WFB-12345). Follow the prompts to input new policy/endorsement information. Print the new document, have it signed and e-mail it to Westfield Bank. This contract will disclose the terms of the Additional Premium only; however, the terms of repayment on the existing account are modified to include the new loan proceeds. The insured will make one combined payment.

## **Revising Payments following Returned Premium:**

If an account has more than one policy and a policy is cancelled, the Return Premium is mailed to Westfield Bank and applied against the outstanding balance – not toward payments. After the funds are applied, we will manually select Recalculate Remaining Payments *with a phone call or e-mail request from the agency*.

## **Notices:**

### ***Agency Notices availability:***

Notices can be received on the same day they are generated. Your agency can select the preferred method of delivery, including e-mail, fax, and/or regular mail. We can even customize the method of delivery by type of notice.

### ***Adding a General Agent or Broker:***

Add to quote under General Agent so that the Notice of Cancellation will be sent to either.

## **Addresses:**

### ***Adding a P.O. Box:***

Please enter Physical Address on the first address line of the quote followed by the P.O. Box on the second line as the Postal Service reads the address from bottom to top and delivers accordingly.

### ***Address Manager Tool:***

Alternately, a secondary mailing address or P.O. Box can be entered by clicking on the Address Manager Bar just below the address. Enter and save address in pop up window.

### ***Updating Existing Account Addresses:***

Search for existing account: Enter customer name or 5 digits of account number in the Search Bar on the Home Page. Select the Customer Tab and **Edit**. Update address or add secondary mailing address. Confirm change by following the two **Save** prompts.

## **Account Access:**

### ***Access Customer Account by using the Search Box on the Premium Finance Home Page.***

The **Summary Tab** includes due date, intent, cancellation, and reinstatement dates along with the current amount due and 14-day payoff figure. **Edit** allows the agency to Extend Cancellation Date up to 5 days and use our Payoff Calculator.

The **Customer Tab** allows for editing of customer address and phone number and for adding a secondary mailing address through the Address Manager Bar.

The **Documents Tab** allows your agency to view documents, reprint customer coupons and **Edit** to print customer ACH authorization forms.