



**FARMERS MUTUAL**  
OF TENNESSEE

*Agency Newsletter*  
*July 31, 2014*

## Hello to All!

As parents are buying school supplies and students are gearing up to start the new year, we at Farmers Mutual of Tennessee hope you have had a fun summer and made great memories. But if you haven't had enough time in the sun yet, remember that there is still plenty of warm weather yet to come! Thanks to all that gave positive feedback on the last newsletter. Please make sure to read through this one so you can be updated on everything going on with FMT.

**Thanks and have a great week!**

-The FMT Team

## Sweep Payment Report

A "Sweep Report" has been added to BriteCore for agency use. This report is run using a target date range and displays a detailed schedule of sweep payments by agency code and sweep date. Agents and agencies can run the report in order to reconcile bank statements and/or confirm uploads.

### **To retrieve a Sweep Report:**

- Go to *Payments module*.
- Scroll to the bottom of the page to "Retrieve a Sweep Report for Date Range".
- Enter a target date into the date range fields and click 'Go'.
- Once downloading is complete, the sweep report will be available for view in .xls format.

# PAYMENTS

## SCHEDULE SWEEP

### ADD PAYMENT TO SWEEP (Any scheduled payments made today will be processed overnight.)

Policy/Quote Number  Named Insured  Billing Schedule  Amount \$ 0.00 Payment Method

#### Installments Remaining

Bill Date	Due Date	System Amount Due	Adjusted Amount Due
← NO RESULTS →			



### SWEEP QUEUE

Policy/Quote Number	Amount	Payment Method
← EMPTY →		

Submit Sweep

Retrieve a Sweep Report for Date Range:

From (MM/DD/YYYY)  To (MM/DD/YYYY)



## Property Photos

Occasionally, the Underwriting Department is receiving photos taken from websites (Trulia, Zillow, etc.). While this does give us a general idea as to the appearance of the home, they are not accepted on new and renewal business. FMT expects agents to inspect a property, take their own photos, and upload them to the policy.

## Payment Method Placeholders

The "Billing" tab on BriteCore has been updated to include a "Credit Card or ACH" block next to the Cash, Check, or Money Order option underneath the main Billing Method section. With this new enhancement in place, agents can clearly see the options to add a payment method for Credit Card or ACH Account, as well as for Cash, Check or Money Order. To see the difference, click here: [Billing Tab Update](#).

**Reminder:** We cannot draft monthly EFT payments from credit or debit cards. These still must be set up using a bank account.

## And the Winners Are....

### 2nd Quarter 2014 Top Producers

**Patrick Rogers**

Rogers Insurance - Tullahoma  
72 new applications

**Shelia Hickey**

Hoover & Son - McMinnville  
34 new applications

**Craig Allen**

Allen's Insurance - Oneida  
16 new applications

**Dana Webb**

First State Insurance - Jackson  
16 new applications

### 2nd Quarter 2014 Drawing Winners

**Denise Meeks**

Hatchett Insurance - Winchester

**John H. Richardson**

J. Paul Richardson & Sons - Fayetteville

**Jackie Rogers**

Unicoi County Insurance - Erwin

## Football Ticket Winner

**Mike Campbell**  
Campbell Insurance - Harrogate

**Congratulations, Guys!**

## Producer Contest

**Each quarter FMT awards \$100 gift cards to top producers. Here is how you can participate...**

- Top 3 individual producers (based on policies issued) will each receive a \$100 gift card after each quarter
- Names of all producers with a minimum of 5 new applications each quarter will be placed in a drawing for a \$100 gift card ~ 3 selected each quarter
- Top 3 individual producers for the year will receive an additional \$100 gift card
- Names of the top 10 individual producers at the end of the 2nd Quarter will be placed in a drawing for 2 UT home game football tickets of the winner's choice
- Names of the top 10 individual producers at the end of the 3rd Quarter will be placed in a drawing for 4 UT home game Men's basketball tickets of the winner's choice

[2014 Producer Contest Entry Form](#)

## Changes to the FMT Site

Our website at [fmtinsurance.com](http://fmtinsurance.com) is being updated. In addition to FMT forms (EFT Authorization, ACV Acknowledgement, Agent of Record Change, etc.), the site has other resources to help keep you informed. Below is a glance at some of the changes so far:

## Memos/Notices

2014 Producer Contest | Rev. 1-2-2014



- ▶ FMT Forms
- ▶ Underwriting Manual
- ▶ BriteCore
- ▶ Citrix Policy Management System
- ▶ Newsletters
- ▶ Logout

**Notice that there is now a link to the BriteCore Login next to the Agent Login**

Also, there is now a link on the homepage of BriteCore that will take you to our AIMS Citrix Interface to access policies not yet in BriteCore:



Welcome to the agent access dashboard. **Please read the following:**

- **Sweep Payments** - Click on the "PAYMENTS" icon above. Be sure to enter the entire policy number including 'dashes'.
- **Credit/Debit Card Payments** - Encourage customers to visit the Farmers Mutual website at [www.fmtinsurance.com](http://www.fmtinsurance.com) to make payments online. If the customer prefers to give you their payment information, go to "ACCOUNTS RECEIVABLE" within their policy and click on "MAKE PAYMENT".
- **EFT** - Click here for an [EFT Form](#) . *A completed and authorized EFT form, along with voided check and initial payment, needs to be provided to Farmers Mutual for each customer who wants this payment option .*

To quote with our **FLOOD INSURANCE PARTNER** , please click here for the [Flood Insurance Quoting Site](#) . To view policies that are still in **AIMS** , login to [AIMS Citrix Interface](#) .

**Note:** In order to simplify things, we will be changing the agent passwords for our website to match the ones used to log in to BriteCore. If you have any questions on this, please contact Lydia at [lydia@fmtinsurance.com](mailto:lydia@fmtinsurance.com)

## Print List Summaries

You may have noticed that instead of getting an email for each document printed, you now get one email a day with a list of hyperlinks to every document that has been printed the night before. To view these documents log into BriteCore and then click the link in your email. If you prefer receiving each document in an individual email, please contact Lydia at [lydia@fmtinsurance.com](mailto:lydia@fmtinsurance.com) to request the change.

## Mark your Calendars

This year's Fall Agents Meeting will be on Monday, November 3rd in Pigeon Forge at the Music Road Hotel.

## Endorsement Requests

Agents have the ability to make premium and non-premium endorsement requests on all active policies located on the BriteCore system. It is preferred that changes be made through the system rather than by sending an email or fax to your underwriter. Changes made to policies and submitted through the system will be reviewed by your underwriter before being committed.

## To quote policy changes in BriteQuote:

- Go to the "Policies" module and search for the active policy you wish to quote a change.
- Click the "Quote a Change" button (blue "Q" icon) to create a change.
- Type the effective date of the policy change in the "New Policy Change" box.
- Briefly describe the change you are going to make within the "Additional Description" box located near the top of the screen.
- Make the necessary endorsements/changes to the policy.
  - **Note: The two steps above must be completed for the endorsement to be submitted correctly**
- Verify changes, then click "Submit" tab. However, if you decide not to submit the change request, simply discard the request by clicking the red "Discard a Change" icon near the top of the screen.
- A new revision will be created on the policy in BriteCore once you submit the change request.
- New revisions must be reviewed and committed by an underwriter in order to take effect on a policy

We plan to review this procedure at the Fall Agents Meeting. After that review, it will be required that all endorsements be turned in through the BriteCore system in this manner.

## Schedule a Meeting

If you or someone in your office would like some additional training on the BriteCore quoting system, contact [wes@fmtinsurance.com](mailto:wes@fmtinsurance.com) to schedule an online or face-to-face meeting.

Wes Gainey  
Agency Relations  
865.523.5153 ext. 237  
[wes@fmtinsurance.com](mailto:wes@fmtinsurance.com)

## Have Any Questions?

Lydia Wade  
Customer Service  
865.523.5153 ext. 221  
[lydia@fmtinsurance.com](mailto:lydia@fmtinsurance.com)

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