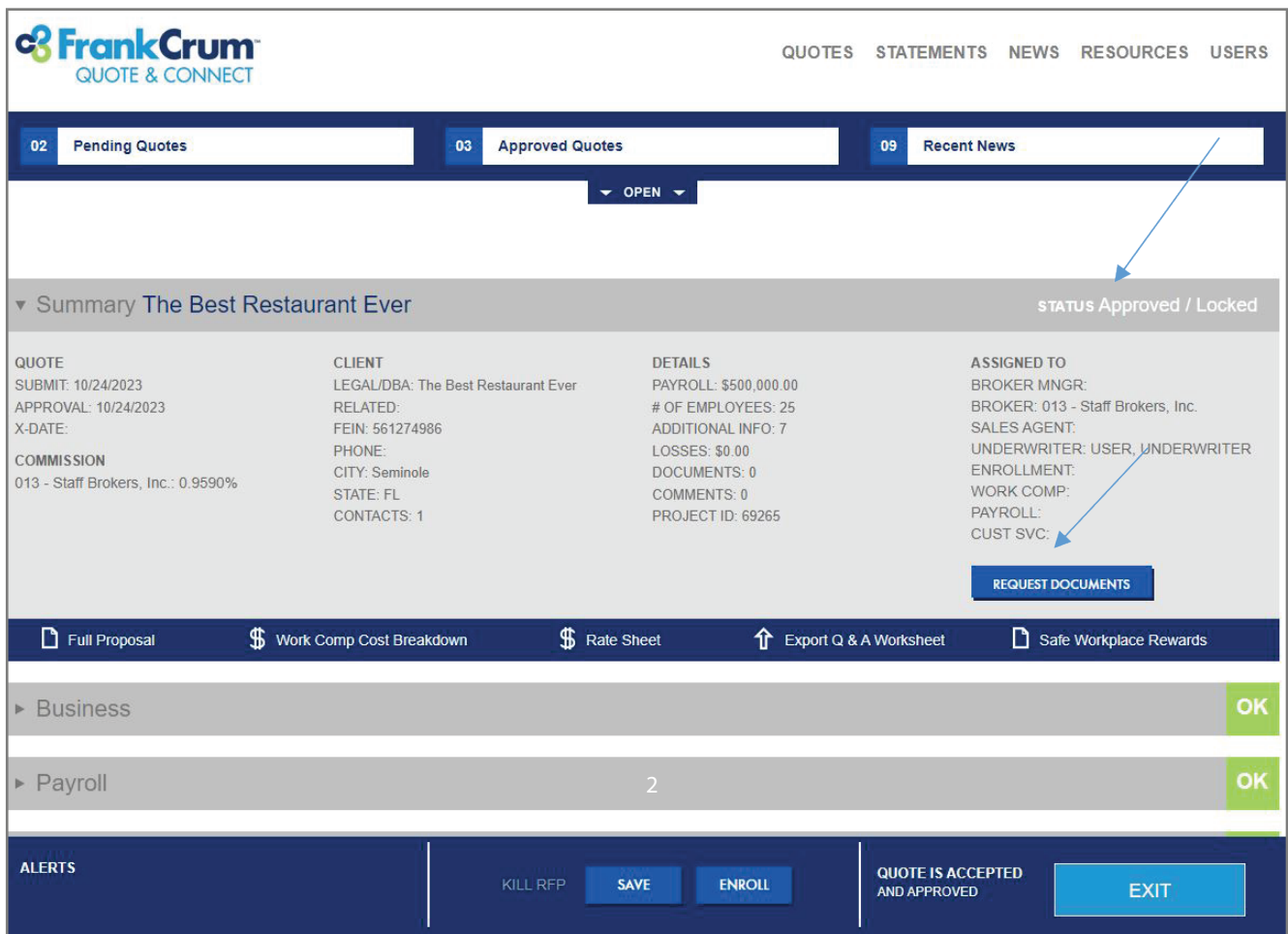


ELECTRONIC DOCUMENT WIZARD

Request and send electronic documents (via DocuSign) to your prospects through Quote & Connect using the **Electronic Document Wizard**.

This functionality is available when the application is in **Approved** status.



The screenshot displays the FrankCrum 'QUOTE & CONNECT' interface. At the top, there are navigation tabs for 'QUOTES', 'STATEMENTS', 'NEWS', 'RESOURCES', and 'USERS'. Below this is a header with three tabs: '02 Pending Quotes', '03 Approved Quotes', and '09 Recent News'. An 'OPEN' dropdown menu is visible. The main content area shows a quote summary for 'The Best Restaurant Ever' with a status of 'Approved / Locked'. The quote details are organized into four columns: QUOTE (SUBMIT: 10/24/2023, APPROVAL: 10/24/2023, X-DATE:), CLIENT (LEGAL/DBA: The Best Restaurant Ever, RELATED: FEIN: 561274986, PHONE: CITY: Seminole, STATE: FL, CONTACTS: 1), DETAILS (PAYROLL: \$500,000.00, # OF EMPLOYEES: 25, ADDITIONAL INFO: 7, LOSSES: \$0.00, DOCUMENTS: 0, COMMENTS: 0, PROJECT ID: 69265), and ASSIGNED TO (BROKER MNGR: BROKER: 013 - Staff Brokers, Inc., SALES AGENT: UNDERWRITER: USER, UNDERWRITER, ENROLLMENT: WORK COMP: PAYROLL: CUST SVC:). A 'REQUEST DOCUMENTS' button is located at the bottom right of the quote details. Below the quote details is a navigation bar with icons for 'Full Proposal', 'Work Comp Cost Breakdown', 'Rate Sheet', 'Export Q & A Worksheet', and 'Safe Workplace Rewards'. The bottom section shows a list of items: 'Business' (OK) and 'Payroll' (2 OK). At the very bottom, there is an 'ALERTS' section with a 'KILL RFP' button, 'SAVE' and 'ENROLL' buttons, and a 'QUOTE IS ACCEPTED AND APPROVED' message with an 'EXIT' button.

The **Request Documents** button opens the **Electronic Document Wizard**. The wizard allows the two required signature documents (Rate Sheet and Identification Form) to be sent to the client electronically via DocuSign.

ELECTRONIC DOCUMENT WIZARD INSTRUCTIONS

Select a contact from those added to the system during the quoting process or add a new contact to receive documents.

Note: Only one contact may be selected to receive electronic documents.

Step 1

Confirm all contact information is correct, as incorrect information may delay client enrollment. If contact information needs to be updated, press the **Edit** button and a dialog box will be displayed, allowing you to make the desired changes.

If you need to add additional contacts, press the **Add Contact** button. A dialog box will be displayed that will allow you to enter a new contact. After the contact is entered, it will be displayed for selection.

After selecting the contact, choose the documents you wish to send to the client for electronic signature. Then click **Next**.

ELECTRONIC DOCUMENT WIZARD ✕

Please select or add enrollment contact. Contact name and phone are required to begin the enrollment process.

If you would like to send electronic enrollment documents, please select the documents desired.

Additional notes can be added by selecting the Additional Notes button.

Please contact Sales at 877-695-6207 or sales@frankcrum.com for assistance.

Select	Edit Contact	Name	Title	Phone	Email
<input type="radio"/>	Edit	Joe Smith	Owner	(727)555-1212	duanam@frankcrum.com

Add Contact

Please select documents to send for electronic signature

Rate Sheet
 Identification Form

Additional Notes

Step 1 of 2

Next

Step 2

Page two of the **Electronic Document Wizard** provides a detailed list of products and services available through FrankCrum. Here, you can select the products and services for which the prospect expressed interest.

- a. If you need additional information about an individual item, click **more...** to see additional details that are useful to the sales process.

Press the **Back** button to return to the previous page.

ELECTRONIC DOCUMENT WIZARD ✕

Please select the features that the prospect is interested in.

<input type="checkbox"/> MyFrankCrum more...	<input type="checkbox"/> Early COI more...
<input type="checkbox"/> PayCards more...	<input type="checkbox"/> Espaniol Assistance more...
<input type="checkbox"/> PTO Set Up/Tracking more...	<input type="checkbox"/> Quickbooks/GL more...
<input type="checkbox"/> HR requests (handbooks) more...	<input type="checkbox"/> Pre Tax Deductions more...
<input type="checkbox"/> Per Diems more...	<input type="checkbox"/> Electronic Onboarding more...
<input type="checkbox"/> Health Benefits more...	<input type="checkbox"/> Time Clocks more...
<input type="checkbox"/> 401(k) more...	<input type="checkbox"/> General Liability more...
<input type="checkbox"/> Background Checks more...	<input type="checkbox"/> Loss Control/Risk Mang. more...
<input type="checkbox"/> Drug Screening more...	<input type="checkbox"/> ACA Compliance more...
<input type="checkbox"/> E-Verify more...	<input type="checkbox"/> Advanced Reporting more...
<input type="checkbox"/> HR Training more...	<input type="checkbox"/> Tax Credits more...
<input type="checkbox"/> Claim reporting more...	<input type="checkbox"/> Recruitment/Staffing more...

Additional Notes

Step 2 of 2

Last

Send Docs

ELECTRONIC DOCUMENT WIZARD

Additional Product Information: MyFrankCrum

MyFrankCrum

FrankCrum offers clients and their employees' access to a Self Service Human Resource Information System (HRIS) also known as MyFrankCrum. This web based system is customizable to meet each individual client's needs and it's available at no cost to your client. Some of the many benefits for employers include reporting payroll, manage PTO requests, access and store forms, create reports, access certificates of insurance and much more. This system also gives employers access to an HR and Safety resource library that provides information which they can share with their employees. Employers can also manage performance reviews and employee inventory.

Some of the many benefits for the employees include managing personal information, direct deposit preferences, view and print W-2's, pay statements forms and company info. There are many other features available to the employees such as managing their PTO (paid time off) and accessing different "perks and benefits" available to them as a co-employee of FrankCrum.

FrankCrum can provide your client with a demonstration of this system to show

Back

- b. If you would like to add additional instructions for processing the enrollment, press the **Additional Notes** button and a text box will be displayed.

After you are done entering your notes, press the **Back** button to return to the previous page.

- c. Press the **Send Docs** button when your input is complete. The wizard will close, and a confirmation message will be displayed indicating the documents were sent.

When the document(s) are electronically signed by the client, Quote & Connect will automatically send the RFP into **Enrollment** status.

Note: Because of the process of gathering the information and transmitting the request to DocuSign, there may be a brief delay between when you order documents and when they are sent to the client's email address.

ELECTRONIC DOCUMENT WIZARD

Additional Enrollment Notes

Add any additional notes and enrollment instructions:

additional notes...

Back

ELECTRONIC DOCUMENT WIZARD x

Please select the features that the prospect is interested in.

<input type="checkbox"/> MyFrankCrum more...	<input type="checkbox"/> Early COI more...
<input type="checkbox"/> PayCards more...	<input type="checkbox"/> Espaniol Assistance more...
<input type="checkbox"/> PTO Set Up/Tracking more...	<input type="checkbox"/> Quickbooks/GL more...
<input type="checkbox"/> HR requests (handbooks) more...	<input type="checkbox"/> Pre Tax Deductions more...
<input type="checkbox"/> Per Diems more...	<input type="checkbox"/> Electronic Onboarding more...
<input type="checkbox"/> Health Benefits more...	<input type="checkbox"/> Time Clocks more...
<input type="checkbox"/> 401(k) more...	<input type="checkbox"/> General Liability more...
<input type="checkbox"/> Background Checks more...	<input type="checkbox"/> Loss Control/Risk Mang. more...
<input type="checkbox"/> Drug Screening more...	<input type="checkbox"/> ACA Compliance more...
<input type="checkbox"/> E-Verify more...	<input type="checkbox"/> Advanced Reporting more...
<input type="checkbox"/> HR Training more...	<input type="checkbox"/> Tax Credits more...
<input type="checkbox"/> Claim reporting more...	<input type="checkbox"/> Recruitment/Staffing more...

Additional Notes

Step 2 of 2

Last

Send Docs