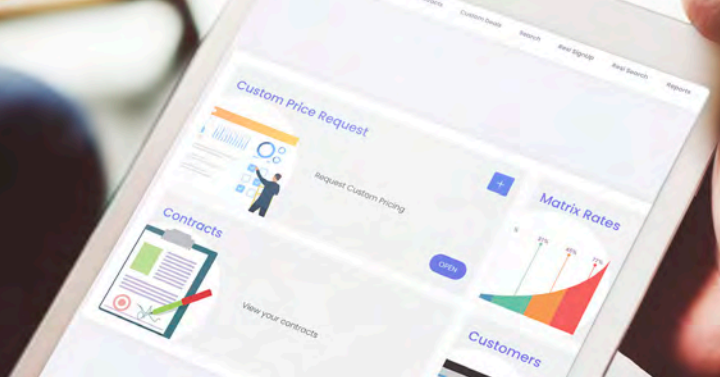




MSC AUTO RENEWALS



We are releasing a new feature in MSC with functionality around renewals. The goal is to help brokers inform their customers of upcoming renewals. An automatic DocuSign contract with the same margin, term and supplier will be sent to the customer.

AUTO RENEWAL FEATURE - OCT 2020

As default, the auto-renewal email will be sent 90 days in advance, 60 days in advance, 30 days in advance, on day of expiration, and 30 days after expiration. BOX Brokers can customize to send to all of these options, or remove any of the interval frequency. They will simply need to just ask their Account Manager to customize this on their behalf.

Generate Auto Renewals for Contracts Expiring On These Intervals

3 Months 2 Months 1 Month

Current Month Last Month

In addition, if there is a specific customer that they do NOT want to receive any of these emails, they can utilize the flag feature on the Contracts tab to opt out for that contract as pictured.

Flags

Do not send to Auto Renewal X v

Do not send to Auto Renewal

Do not send to Auto Renewal

Do not send to Auto Renewal

Do not send to Auto Renewal

You will also be able to customize what phone number and email will be the Agency's Renewal Contact. Your BOX Account Manager can help you with this as well!

Email

Phone

Type	Category
Auto-Renewal -1	
Auto-Renewal 0	
Auto-Renewal 1	
Auto-Renewal 2	
Auto-Renewal 3	

Brokers will be able to view once a contract has been sent under Type on the Contracts side. You can utilize this filtration to manage calls and follow ups with your customers.

BROKER ONLINE EXCHANGE

BrokerOnlineExchange.com
(817) 350-4880