

## Castle – Rapid-Calc Procedures

### Creating a New Replacement Cost Calculation

1. Login to the Castle site from the Personal Lines Tab of the For Our Agents section on the Unigard Web Page ([www.unigard.com](http://www.unigard.com))
2. If you know it, enter the policy number.
  - a. If there are multiple locations on a Dwelling Fire policy, input the policy number followed by a dash, then the appropriate location number. Example: 20001234-1, for location 1. The policy number for location 2 would be 20001234-2
  - b. Do not enter a zero before the location number. Example: 20001234-01
3. Enter the insured's full name in the Name field, the first name followed by the last name. Example: Joseph Insured.
  - a. If there are two named insureds on the policy, enter the first full name.
  - b. If it's a Dwelling Fire policy and the named insured is other than an individual, input the name exactly as shown on the Unigard mainframe.
4. Enter the Property Address.
5. Enter the other mandatory fields on the first screen. Click on the "Next" arrow.
6. Continue to complete mandatory fields on each successive screen.
7. Review the instructions at the top of each screen to obtain clarification about what should be selected or entered.
8. When you get to the basement screen, if the home has a crawl space, select the option that says "No Basement".
9. On the final page, you can click on the Summary Report to see the details behind the replacement cost calculation
10. You can also click the "View/Edit Components" box to view and/or edit interior feature information. When you do this, the updated calculation will receive a new Tracking Number. You will still be able to review the original estimate if desired by searching for the original tracking number.

11. Write or type the Tracking Number and replacement cost on the application.
12. Click on the Estimator tab at the top of the page to complete another estimate or click on the Close Window field to exit the Castle system.
13. All estimates will be saved automatically and indefinitely.

### **IMPORTANT REMINDERS**

- Assign the Policy Number if you know it on all calculations.
- If you want to see how the calculation would change if you altered one or more features, edit on the original calculation, rather than start a new estimate.

Unigard is charged for each new Castle estimate, however there is no additional charge when the original calculation is modified –as many times as you'd like – within the first thirty days

- Copies of each edited version are stored in the Castle system.

### Searching for an existing Estimate

1. Login to the Castle site from the Personal Lines Tab of the For Our Agents section on the Unigard Web Page ([www.unigard.com](http://www.unigard.com))
2. Click on the Search tab on the top of the page.
3. Click the box next to the search option you are going to use (tracking number, date completed, Zip Code, etc) and enter the appropriate information.
4. If you search by tracking number or policy number, it will bring up the specific estimate. If you search by Zip Code, it will bring up all of the estimate for that Zip Code with the most recent estimate being at the top of the list.

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### **Updating an Existing Castle Calculation**

1. Login to the Castle site from the Personal Lines Tab of the For Our Agents section on the Unigard Web Page ([www.unigard.com](http://www.unigard.com))
2. The Search function is located on the top right corner of the Castle home site.
3. Enter the Policy Number. This will bring up the most current estimate. You can also search by any of the other features listed on the home page.
4. Click the Edit button on the top right of the page.
5. Make the appropriate changes on the Estimate Editor page. Important: Remember to add the policy number if it's not already there.
6. Note the new Tracking Number for your records.
7. Close the Castle system and the update will automatically be saved.