



How to Edit an Existing Quote Online

Click on “Quote” Tab

Enter User name and Password

Note: username and password are case sensitive

Click on “Quotes”

In “Find Quote” Box

Enter Insureds name or quote number and click “Find”

Under “Policies” tab click on “Edit” button of the policy you wish to make changes to

Remember when making changes, **Do not enter anything in the “Broker” field**

If the Policy has State Filings, make sure to check the “PUC/Filings” Box

Click “Save Policy”

Click on “Notes” tab and make sure the name of the Agent/ CSR working on account is listed, if no name is listed click on “Add Note” button and enter the contact person’s name

Click on “Terms” Tab to verify Payment information and terms

To receive a copy of a finance agreement, click on “View Agreement”

If you do not have the “View Agreement” icon then to click “Request Authorization”

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