



How to enter a NEW Quote Online

Click on “Quote” Tab

Enter User name and Password

Note: username and password are case sensitive

Click on “Quotes”

In “Start a New Quote” box click on “New”

Enter Insureds information

Note field with * after it **MUST** be filled out!

If an insureds e-mail address is entered, if their payment is ever late we will send them an e-mail reminder notice

At the bottom click “Save All”

Click on “Add Policy” to enter Policy information

Note: **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 then “Add Note”. Enter the name of the Agent/ CSR working on account

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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