



How To Create a Quote

In the upper right hand corner click on the Quotes link

Quotes Accounts Processing Reports Settings Support

In the **Start a New Quote** section type in the name of the Agent. This may auto populate for you with your Agency Name.

Enter in the insured on the quote. If the Insured has already been used on a previous quote you can type their name in the field. If the Insured is new click the **New** button next to the insured field to enter their information

Please note: Required information are name, phone number and mailing address. If the mailing address is a PO Box please enter the physical address as well. Our system default is to send notices via email, if possible please provide an email address

Please note: If you edit information on an existing insured it will affect all quotes and accounts linked to the insured and not just the information for this quote

Start a New Quote Quick Quote Find Quote

Agency: Masters Coverage Corp. **New** **Edit**

Insured: test **New**

Name	Search Code	City	State	Zip
test		Morton Grove	IL	60053
test		Rolling Meadows	IL	60008
test		Rolling Meadows	IL	60008

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Select **New** or **Renewal** for the Quote type

Then select payment method

Please note: only coupons and statements can be selected pre activation. Once the quote is activated this can be changed to auto pay via ACH or with a credit/debit Card

Quote Type: New Renewal

Payment Method: Coupons ▾

Click the **Add Policy** button to add a policy to the quote

Version 1
Entered On 3/4/2020 By nalvarado Last Modified Wednesday, March 04, 2020 By nalvarado

Policies Terms Notes Add'l Insureds

Policy #	Policy Inception Date	Policy Expiration Date	Insurance Company	General Agent	Coverage Type	Pure Premium	Unearned Fees	Earned Fees	Total
No policies exist for this quote.									

Copy Add Policy

Select the **Insurance Company** for the policy (REQUIRED).

Select the **General Agent** for the policy if there is one (OPTIONAL)

Select the **Broker** for the policy if there is one (OPTIONAL)

Enter the **Policy Number** if you have it (OPTIONAL). This can also be done after the quote has been activated

Select the **Coverage Type** on the policy (REQUIRED)

Enter the **Pure Premium** on the policy (REQUIRED)

Enter the **Min Earned %** on the policy (REQUIRED)

Enter **Inception Date** for the policy (REQUIRED)

Select **Term** length for the policy (REQUIRED)

Please note: The Expiration Date will automatically calculate and fill in for you

Enter and **Fees** or **Taxes** in the appropriate fields

Please note: This is required unless there are no fees or taxes on the policy

Select **Cancel Terms** (Required)

Check appropriate boxes if the policy is **Short Rate**, **Auditable** or **PUC/Filings**

Once you have enter all policy information click the **Save Policy** button

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Policies Terms Notes Add'l Insureds

Insurance Co:	<input type="text"/>	New	Inception Date:	<input type="text"/>	Today
General Agent:	No General Agent	New	Term:	12 Month	
Broker:	No Broker		Expiration Date:		
Lienholder:	No Lienholder	New	Policy Fee:	\$0.00	
Policy Number:	<input type="text"/>		<small>Fully in down pmt</small>		
Coverage Type:	Select a Coverage Type		Tax/Stamp Fee:	\$0.00	
Pure Premium:	\$ <input type="text"/>		<small>Financed</small>		
Min Earned %:	<input type="text"/> 0 %		Broker Fee:	\$0.00	
Cancel Terms:	10 Days		<small>Fully in down pmt</small>		
			Inspection Fee:	\$0.00	
			<small>Fully in down pmt</small>		
			Short Rate:	<input type="checkbox"/>	
			Auditable:	<input type="checkbox"/>	
			PUC/Filings:	<input type="checkbox"/>	
			Save Policy	Cancel	

If there are additional policies repeat the steps above for added policies

When All Policies have been entered click Terms Tab



Within your quoting access you can edit the following

1. # of Payments
2. Total Down Payment
3. Interest Rate

Please note: When either information is changed you will see the updated payment amount and amount financed in the Account Summary Section

There is a specific function to compare quotes without constantly changing back and forth. To utilize this function click **+ New Version**



This will copy your current quote into the Version 2 or the next following Version # created. The Yellow Star shown above is to indicate the correct version of the quote to process.

Once the terms are finished you can click View Agreement to pull up a completed Finance Agreement



Print your newly created Premium Finance Agreement.

Have both the Insured and Broker sign and date with their title and then submit for processing to the following email

paul@4cpp.com