Phone: 1-800-442-7050

Email: RobinM@policy-pal.com

How to create a Finance Quote:

1. Click Quotes on Navigation bar
2. Click the Start a New Quote tab
3. Enter your agency code
4. Select an existing insured. If the insured you want is not available, click New and complete insured profile.
5. Select an Account Type. This value defaults to Commercial, but can be changed to Personal
6. Select a Quote Type. This value defaults to New
7. Select an Origination State. This value defaults to Texas
8. Select a Payment Method. This value defaults to Coupons, but can be changed to ACH or Credit/Debit card.
9. On the Policies tab, click Add Policy
10. Select an existing Insurance Company
11. Select an existing General Agent
12. Skip Broker and Skip Lienholder
13. Enter the Policy Number or Quote Number if not bound yet
14. Select the Coverage Type
15. Enter the Pure Premium (without any fees)
16. Enter a Minimum Earned of 25%. If special consideration is needed, please contact Robin.
17. Enter the Inception (Effective) Date
18. Select the Term. This will automatically populate the Expiration Date
19. If applicable, enter a Policy Fee, Tax/Stamp Fee, Broker Fee, and Inception Fee
20. Click Save Policy when finished

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21. Click Add Policy to continue adding more policies to this note
22. Next click the Terms tab
23. Review information, edit as needed
24. Click View Agreement to view and print the Finance Agreement. Click return to Quote and here you might make note of the Quote #