



**Tutorial.**



Create a Quote by choosing a program or bridge existing quote from comparative Rater System

New quote

Quote Type

Effective Date

Product	Product Version
<input checked="" type="radio"/> Pro General Auto	Pro General Auto 07222018
<input type="radio"/> Pro General Value	Pro General Value 08052018
<input type="radio"/> Pro General Choice	Pro General Choice 07162018


Step 1. Choose a Program





Info

Policy Information


Effective Date \* 8/22/2018 

Policy effective date

Term Length 6  Month

Term - only Six month terms available

Input By AccuAuto

Policy Documents Enrolled Mail Docs 

Mailing system

Product Version Pro General Auto 07222018

Product Pro General Auto

Program

Allow sending marketing materials

## Drivers

Info Drivers Violations Vehicles Coverages Rate Questions Validation Payment

Krisina Snow

First Name \* Krisina

Middle Name

Last Name \* Snow

DOB \* 11/4/1991  15 Age 26

Gender \*  Female  Male

Marital Status \* Married

Relation to Applicant \* Applicant

SSN

SSN

Don't have SSN

Credit Score

Credit Report Status Not Ordered

License

License Type US license

License Number \* S11111111111

License State FL

License Status Valid  Override

MVR Status Order

First Licensed US 11/4/2007  15 Age 16

First Licensed Int'l  15 Age



Must enter first licensed age

## Add an Excluded Driver

All household residents age 15 or older and any persons (including all children whether living with insured or not) that ever drive the cars must be listed as a driver or excluded from coverage on the application



### Krisina Snow

First Name \* Krisina  
Middle Name  
Last Name \* Snow  
DOB \* 11/4/1991  15 Age 26  
Gender \*  Female  Male  
Marital Status \* Married  
Relation to Applicant \* Applicant

### SSN

SSN  
  
 Don't have SSN

Credit Score  
Credit Report Status Not Ordered

### License

License Type US license  
License Number \* S111111111111  
License State FL  
License Status Valid  Override  
MVR Status Order  
First Licensed US 11/4/2007  15 Age 16

### Jon Snow

First Name \* Jon  
Middle Name  
Last Name \* Snow  
DOB 12/31/1991  15  
Marital Status \* Married  
Relation to Applicant \* Spouse

## Add a Rated Driver

All household residents age 15 or older and any persons (including all children whether living with insured or not) that ever drive the cars must be listed as a driver or excluded from coverage on the application



### Krisina Snow

First Name \* Krisina  
Middle Name  
Last Name \* Snow  
DOB \* 11/4/1991 <sup>15</sup> Age 26  
Gender \*  Female  Male  
Marital Status \* Married  
Relation to Applicant \* Applicant

### SSN

SSN  
 Don't have SSN  
Credit Score  
Credit Report Status Not Ordered

### License

License Type US license  
License Number \* S111111111111  
License State FL  
License Status Valid  Override  
MVR Status Order  
First Licensed US 11/4/2007 <sup>15</sup> Age 16

### Jon Snow

Exclude

First Name \* Jon  
Middle Name  
Last Name \* Snow  
DOB \* 12/31/1991 <sup>15</sup> Age 26  
Gender \*  Female  Male  
Marital Status \* Married  
Relation to Applicant \* Spouse

### License

License Type US license  
License Number \* S222222222222  
License State FL  
License Status Valid  Override  
MVR Status Order  
First Licensed US 12/31/2007 <sup>15</sup> Age 16  
First Licensed Int'l <sup>15</sup> Age  
 SR-22

### Occupation

Status Unknown

+ Add Driver

Add Excluded Driver

✓ Validate

## Vehicles

Vehicle 1	Vehicle 2
Vehicle Identification <input type="text" value="VIN"/>	Vehicle Identification <input type="text" value="VIN"/>
VIN * <input type="text" value="WBANB33525CN67614"/>	VIN * <input type="text" value="1N4AL11D02C203254"/>
Year * <input type="text" value="2005"/>	Year * <input type="text"/>
Make * <input type="text" value="BMW"/>	Make * <input type="text"/>
Model * <input type="text" value="545"/>	Model * <input type="text"/>
Body Style * <input type="text" value="SEDAN"/>	Body Style * <input type="text"/>
Added Vehicle Verification Date <input type="text" value="Policy Term Effective Date"/>	Added Vehicle Verification Date <input type="text" value="Policy Term Effective Date"/>
Anti-Theft * <input type="text" value="Yes"/>	Anti-Theft * <input type="text"/>
Restraint * <input type="text" value="Airbag"/>	Restraint * <input type="text"/>
<input checked="" type="checkbox"/> ABS	<input type="checkbox"/> ABS
<input type="button" value="Edit"/>	<input type="button" value="Verify"/>
Usage	Usage
Usage Type * <input type="text" value="Pleasure"/>	Usage Type * <input type="text"/>
License Plate <input type="text"/>	License Plate <input type="text"/>
<a href="#">Add Financial Institution/Lienholder/Additional Interest</a>	<a href="#">Add Financial Institution/Lienholder/Additional Interest</a>

Make sure VIN option is selected and enter VIN number

Click Verify

Select Usage Type

Comp/Coll must be added when lien holder is selected

## Coverages

### Coverages

Bodily Injury	<input type="text"/>	▼
Property Damage	10000	▼
Personal Injury Protection	\$1,000 ded. Named Insur...	▼
Work Loss Exclusion	Declined	▼
UMBI	Rejected	▼
Medical Payments	<input type="text"/>	▼
NSD Travel Club	Family Plan	▼

Bodily Injury is available with PPA Auto and Choice Programs only.

Must add or reject UMBI coverage

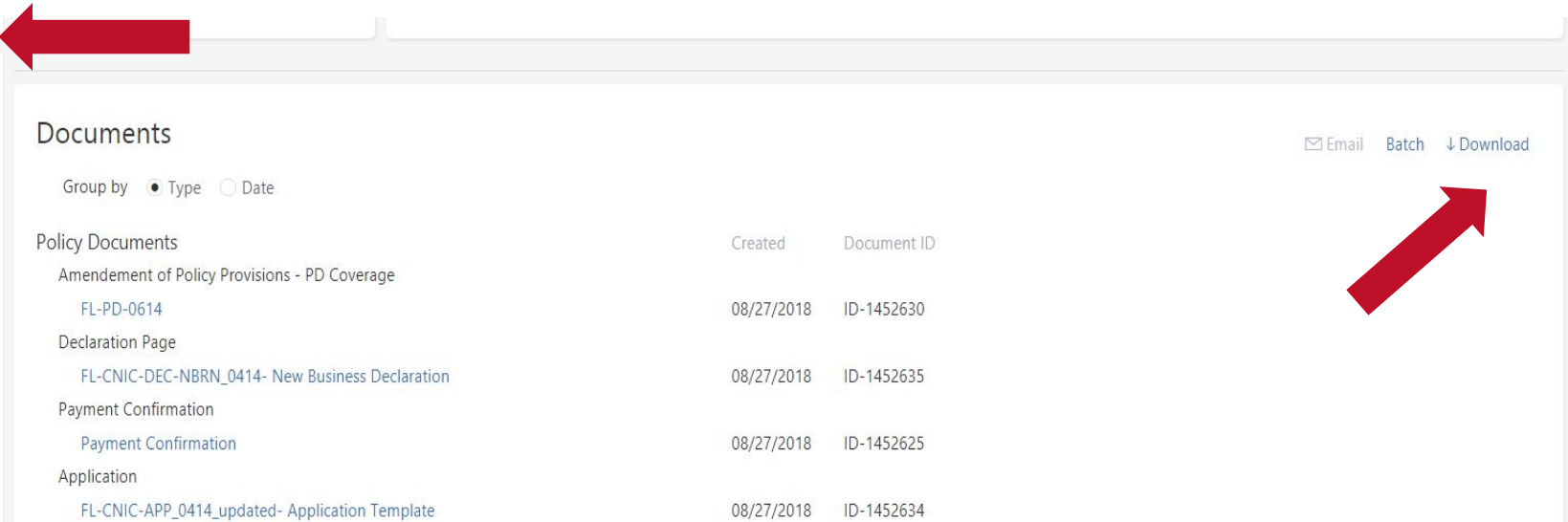
### 2005 BMW 545

Comprehensive	500	▼
Collision	500	▼
Rental Reimburse	<input type="text"/>	▼



## Where to Locate Policy Documents

All policy documents can be located on the documents tab in the policy. Click Download to select which documents are required.



The screenshot displays the 'Documents' section of a policy. On the left sidebar, the 'Documents' tab is highlighted with a red arrow. The main content area shows a list of documents with columns for 'Created' and 'Document ID'. At the top right of the document list, there are buttons for 'Email', 'Batch', and 'Download', with a red arrow pointing to the 'Download' button.

Documents

Group by  Type  Date

Policy Documents	Created	Document ID
Amendment of Policy Provisions - PD Coverage FL-PD-0614	08/27/2018	ID-1452630
Declaration Page FL-CNIC-DEC-NBRN_0414- New Business Declaration	08/27/2018	ID-1452635
Payment Confirmation Payment Confirmation	08/27/2018	ID-1452625
Application FL-CNIC-APP_0414_updated- Application Template	08/27/2018	ID-1452634

✉ Email Batch ↓ Download

## Upload Documents

- Click the Files Tab on the policy
- Enter a description
- Click Upload Files-then press ok
- To download uploaded files to your computer select the file name

## Files

File Name ↓

-00 dec.pdf

↑ Upload files

### Files

Policy has no files uploaded

### Upload Files

Description

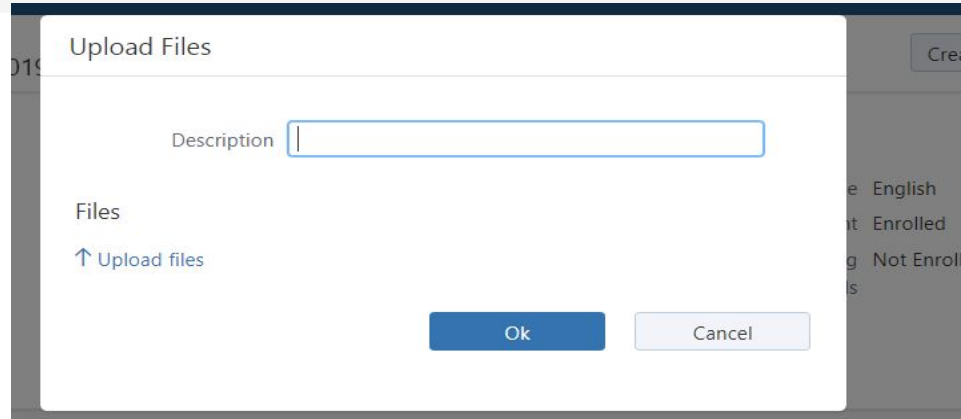
Files

↑ Upload files

Ok

Cancel

Files



## Update Recurring CC and EFT

### Settings

Auto-pay	Enrolled (EFT)		Language	English
Pay Plan	6-Mo 17% Down, 5 inst		Automatic Reinstatement	Enrolled
Document Delivery	Enrolled Mail Docs		Allow Sending Marketing Materials	Not Enrolled

[Edit](#)

## Update Recurring CC and EFT/Enroll Auto Pay

Settings

Choose a setting you'd like to change

**Auto-Pay**  
Switch on or off autopayment

**Document Delivery**  
Select delivery method

Enroll Auto Pay

Auto-Pay

Switch on or off auto-payment

Not Enrolled

Enrolled

▼ Credit Card

Add New Credit Card

▼ Bank Account

Bank Account ending in 3941

Add New Bank Account

Apply Cancel

Apply Changes

## Create an Endorsement

Policy Number PFL039089-00 Policy Status **Active** Policy Period 8/27/2018 – 2/27/2019 Balance \$688.93

Create Endorsement

Make Payment

Policy Home

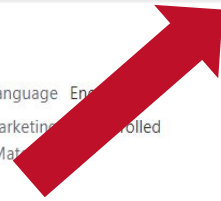
### Insured Info

Name [REDACTED]  
Phone [REDACTED]  
Address [REDACTED]

### Settings

Auto-pay Enrolled (EFT) Language Eng  
Pay Plan 6-Mo 17% Down, 5 inst Allow Sending Marketing [REDACTED]  
Document Delivery Enrolled Mail Docs Mat [REDACTED]

Edit



Billing and Payments

Policy Details

Documents

Endorsement History

Activities

Files

### Billing and Payments

Premium Paid	\$139.57	Fees Owed	\$7.50
Fees Paid	\$41.00	Fees Estimated	\$18.00
Premium Owed	\$681.43	Unpaid Prior Balances	\$0.00

Policy Total: \$887.50

Installments

## Create an Endorsement

### Premium Changes

	Term	Current Installment	Future Installments
Previous	\$821.00	\$0.00	\$143.79
New	\$1,511.00	\$117.30	\$265.83
Change	\$690.00	\$117.30	\$122.04

Monthly Premium Uprate \$117.30

Additional Fees \$0.00

Amount Due Prior to Endorsement \$0.00

Total \$117.30

### Vehicles

+ KIA SORENTO (2004)

### Make a Payment

Choose an option

- Active Term Total
- No Payment

Payment Amount \*

### Select payment method

- Credit Card
- Bank Account
- Bank Account ending in 3941

- Trust

Additional Premium for Endorsement

Initial Premium and Payments

New Premium and Payments

Submit Endorsement



Contact Us for any  
questions

- Kristina Amela- UW <[kristina.amela@prontoinsurance.com](mailto:kristina.amela@prontoinsurance.com)>  
(844) 776-4361 x. 1114
- Underwriting Department  
(844) 776-4361 option 3
- <http://www.progeneralinsurance.com/>