



IPFS technology allows you to import an excel file with your policy information directly into ipfs.com to obtain a quote. On the home page of ipfs.com, select **Quote Upload**.

1 Documents

What type of quote would you like to create?

- New Account, Additional Premium, Renewal

Select the Parent Entity

- Use the drop-down menu to select the parent entity if different than the default

Select the Location for this Quote

- Use the drop-down menu to select the office location for the quote if different than the default

Upload Spreadsheet with your Quote Details

- You can drag and drop the excel file directly from an email or saved file onto the screen
- Click in the box to browse for your file and attach there

Quote upload request

1 Documents
2 Exceptions
3 Confirmation

What type of quote would you like to create?

New Account

Select the parent entity

Select the location for this quote

Upload spreadsheet with your quote details

Drag and drop a file HERE or Click anywhere in this box to browse

Cancel
Submit

2 Exceptions

If the quote requires IPFS review, a message will display. IPFS will contact you if additional information is needed or provide you with the PFA.

Thank you for uploading your request. The IPFS team is reviewing and will reach out if any additional information is required. You may drop your next Quote Request when ready.

We have detected your Data Format might not be correct in the Excel book used. This could be caused by the order of the columns or the data entered is not what was expected. The IPFS team is reviewing and will reach out if any additional information is required. Thank you for uploading your request. You may drop your next Quote Request when ready.

The information contained herein is confidential and proprietary. Recipients will respect the confidentiality of this material and not disclose to any third party any of the contents of this document without first obtaining written approval from Imperial PFS.



3 Confirmation

If the upload is successful and no other information is needed the PFA will display or will be available from the browser download drop down.



Email Notification

The user will receive an email notification upon completion of the upload.

- If the upload is successful, you will receive a confirmation email notification along with the PFA.
- If the upload fails, you will receive an email notification with the failure reason along with all uploaded documents.