



Access from Quoting > Start Quote or click the [New Quote](#) button on the dashboard.

1 Agent

- The entity name will populate, or you can select an associated entity.

2 Insured

Insured Name

- Enter the Insured Name and select an existing insured from the drop-down menu.
- If you do not see your insured listed, select **New Insured**
 - A pop-up will open where you can add an associated address and phone number.

Account

- Renewal or Additional Premium quotes search by Account #.

3 Program

- Select Billing Type
 - Invoice, Coupon or Preferred Billing Method
- Select Loan Type
 - Commercial or Personal

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4 Policies

Details

Policy #*

Coverage*

Eff. Date* MM/DD/YYYY

Exp. Date* MM/DD/YYYY Term

Premium* \$ 0.00

Taxes \$ 0.00

Fees \$ 0.00

Total Premium \$ 0.00

Min. Earned %

Min. Earned \$

Down \$*

Cancel Days*

Auditable

Loss Payee Required

Loss Payee Request

Company [collapse]

Preferred List Master List

Contact Name

Contact Phone

General Agent [collapse]

Preferred List Enter your own

Contact Name

Contact Phone

Broker [expand]

Click [expand] to add a Broker

- Enter policy details one policy at a time.
- If you do not have the policy #, leave as PENDING.
- Separate pure premiums, taxes and policy fees.
- Include any Minimum Earned Premium and Cancel Days.
- Use the Preferred List to select commonly used Companies and General Agents.
- For multiple policies, select Save & New Policy and repeat until you've entered the final policy.

5 Underwriting

- Quote terms will either be based on the program selected or set by default.
- IPFS Credit Advantage™ pop up may appear, offering enhanced terms for credit worthy insureds.

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- Financing is flexible – the Down Payment, Interval, Beginning Date, and Payment #, can all be edited.
 - Edits outside of the defaulted/selected program will be sent for IPFS Account Executive review.
- Broker Fee is any fee you are charging the insured.

Premium	<input type="text" value="\$5,000.00"/>	Interval	<input type="text" value="MONTHLY"/>	
Down	<input type="text" value="\$ 1,250.00"/>	Down %	<input type="text" value="25.000"/>	
Principal	<input type="text" value="\$3,750.00"/>	Beginning	<input type="text" value="02/03/2025"/>	
		Pymt #	<input type="text" value="9"/>	
Broker Fee	APR	Doc Stamp	Fin Chg	Amt Fin'd
<input type="text" value="\$ 0.00"/>	<input type="text" value="14.190"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$ 225.21"/>	<input type="text" value="\$3,750.00"/>
Pymt Amt	Total Pymt			
<input type="text" value="\$441.69"/>	<input type="text" value="\$3,975.21"/>			

<input type="button" value="Save Quote"/>	<input type="button" value="Save & New Quote"/>	<input type="button" value="Cancel"/>	<input type="button" value="Worksheet"/>	<input type="button" value="Reset Quote"/>
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- **Save Quote** to obtain the Premium Finance Agreement (PFA).
- **Save & New Quote** will open a new quote for you to enter while saving the current quote.
- **Cancel** to exit the quote without saving.
- **Worksheet** will provide terms based on your program but is not a finance contract and does not save the quote.
 - If the quote is not saved after producing the worksheet, the quote data will be lost.

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