



16438 Vanowen Street, Suite #205 Van Nuys, CA 91406  
Telephone (800) 452-8505 Facsimile (800) 209-0120  
<http://www.lgpf.net> / [info@lgpf.net](mailto:info@lgpf.net)

## Quote Creation Workflow

Here are the steps for entering a new quote.

1. Log in.
2. Click on the Quotes button.
3. 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 and search for their record. If the insured is new to your site click the 'New' button next to the insured field to enter in their information. Please note that if you edit the information on an existing insured it will affect all of the quotes and accounts linked to the insured record, not just the information for this quote. (Please double check the Insured contact information as we will be mailing the insured a welcome letter along with the coupon book)
4. Select 'Commercial' or 'Personal' for the account type.
5. Select 'New' or 'Renewal' for the quote type.
6. Click the 'Add Policy' button to add a policy to the quote.
7. Select the Insurance Company for the policy. (This is a required field)
8. Select the General Agent for the policy if there is one.
9. Select the Broker for the policy if there is one. (Please note that you should not use the same company as both the General Agent and the broker on a single policy.)
10. Enter in the Policy Number for the policy if you have it. This can also be done after the quote has been activated.
11. Select the Coverage Type on the policy. (This is a required field)
12. Enter in the Gross Premium (don't include taxes, policy fees, broker fees..etc.etc) on the policy. (This is a required field)
13. Enter in the Min Earned % on the policy. If this percentage is higher than the down payment percentage from the down payment rule set, the min earned percentage will be used as the down payment percentage for the policy.
14. Select the Term length for the policy.
15. Enter in the Inception Date on the policy. When you do this the Expiration Date will automatically calculate and fill in for you. The Inception Date and the Expiration Date are required fields.
16. Enter any fees or taxes in the appropriate fields.
17. Select the Cancel Terms and check the appropriate boxes if the policy is Short Rate, Auditable, or PUC/Filings.
18. Once you have entered in the entire policy information hit the Save Policy button.
19. If there are additional policies on the quote repeat steps 6-19 to enter it in. When all of the policies have been entered hit the Terms button.
20. The Terms page shows the quote figures based on rate table and down payment rules assigned to the agent. If any adjustments to the interest rate or down payment percentage need to be made they can be done on this screen. Once the terms are finished you can click the View Agreement button to pull up a completed finance agreement.
21. Print the finance agreement and have it signed.
22. Fax the signed finance agreement, DAC page(s)/Binder page(s) along with the coversheet to the fax listed on the coversheet.
23. Click on 'Request Activation'

Once we receive the fax request and online notification of activation, we will begin our underwriting

procedure to ensure all information related to the policy(s) are accurate between the finance agreement, insurance policy and down payment requirements.

Our goal is to complete the activation the same day; however, all policies are activated within 24 hours. Should there be any discrepancies identified, we will call you to review.

Upon activation, we send payments to the approved parties and mail a coupon book to the insured for future payments.