

# WebFM<sup>TM</sup> MANUAL

**CONTENTS:** 

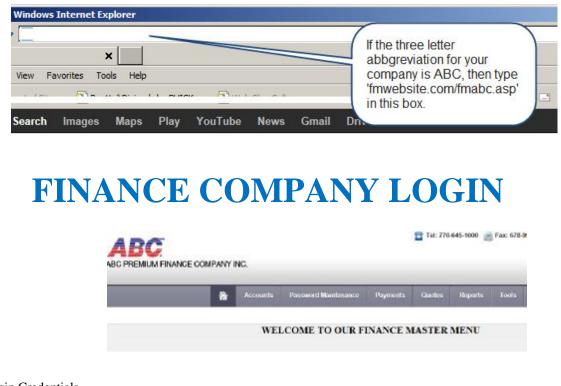
## Ø Introduction

Ø Finance Company Login

# **INTRODUCTION**

The address of your website is 'fmwebsite.com/fmxxx' where 'xxx' is the three letter abbreviation of your company name. Please ask your AIS support technician for the three letter abbreviation for your company.

Your site requires <u>Internet Explorer</u>. To browse to your site, simply type 'fmwebsite.com/fmxxx.asp in the address bar of Internet Explorer:

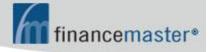


ULogin Credentials

ADVANCED INSURANCE SYSTEMS. INC.

Page 1

CONFIDENTIAL AND VALUABLE TRADE SECRET



ID is '\_\_\_' (see your AIS support technician);

Password is \WinFM\Finance Company Maintenance\Address/Phone\Web Password; If no password then use \_\_\_\_\_\_.

- Ø Accounts
  - Inquiry by Account Code or DBA or Name or Policy Number; Click on specific account code in first column for more information and options; Post a Payment by check or credit card

#### Ø Password Maintenance

- Agent Passwords
- GA Passwords
- Insured Passwords
- Sales Rep Passwords
- Ø Payments
  - Download Web Payments:



The purpose of this option is to download web payments into your WinFM® system. These instructions will detail how to download the payments and import them into WinFM®.

- a. Login to your website as Finance Company and click \Payments\Download Web Payments;
- b. Then click on Click Here to Download your Web Payment(s):

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c. Choose to Save As:



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d. Be certain you save the file in the correct folder:

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📕 WebCheckD68U	6/24/2013 11:51 AM	File folder	
WebCheck.mdb	7/11/2013 5:53 PM	Microsoft Access Da	

- Redownload Web Payments: This option is used in the event your need to repeat your most recent download. If, for example, the download file is lost for any reason, use Redownload to download it again.
- Reset Web Payment(s) for Download: In the event you need to re-download one or more payments, click 'Reset Web Payment(s) for Download:



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Account Name:			
Account Number	[		
Check Number:			
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Payment Type:	s 2×Marey Grite	rs d=Gash 4	l=Credit C
Payment Type: 1=Check	-		I=Credit C

- Delete Web Payments: Use this often to avoid storage of sensitive information. Payments over 60 days old are subject to deletion.
- Delete Sensitive Info
- Ø Quotes
  - Create a Quote
  - Copy Existing Quoting Parameter
  - Delete a Quote
  - Delete Quotes by Range of Dates
  - Download Web Quotes

This option downloads all quotes that have not yet been downloaded.

NOTE: The WebQuote folder resides within the FinanceMaster folder: \FinanceMaster\WebQuotes and within the \WebQuote folder there should be: Filecopy.avi FMWebQuoteLoad.exe FMWebQuotedontbackup.dat FMWebQuotedontbackup.dat FMWebQuoteAutoProc.exe FMWebQuoteDB.dat The contents of FMWebQuoteDB.dat should be four lines:

FMabcQuoteDL.mdb (where abc are the three initials of your company) quote <u>https://www.fmweb2.com/fmabc/fmwebquoteautoproc.asp</u> SQL

a. Login to your website as Finance Company and click \Payments\Download Web Quotes:





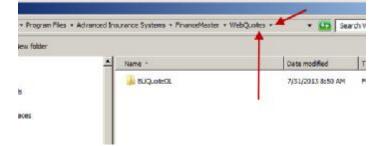
b. Then <u>click on Click Here to Download your Web Quote(s)</u>:

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c. The Download message should display:

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1	Save as	
		Cancel

d. Be certain you save the file in the correct folder:



- Note: If you receive a message "File Already Exists" it means you did not perform the following step e when you last downloaded quotes. Respond to this message by clicking Cancel. Then proceed to step e. After step e is completed, choose to Redownload Quotes and proceed to step c.
- e. After saving the file, return to your desktop and double click on the FMWebQuoteLoad icon:





f. The program will import the downloaded quotes into WinFM and display:

MWebQuote	Load	×
FM Database h	has been updated with Web Quotes su	uccessfully.
Total Quotes v	written to the Database = 57	

• Redownload Web Quotes:

This option is used in the event your need to repeat your most recent download. If, for example, the download file is lost for any reason, use Redownload to download it again.

#### • Reset Web Quotes(s) for Download:

If you need to re-download one or more quotes, click 'Reset Web Quote(s) for Download:

RESET QUOI	ES FOR DOWN	LOA
Quote Name:		
Quote Code:		
Agency Code:		
General Agent Code:		
Downloaded Date:	Select	~
Quote Date:	Select	~

Retrieve a Quote

**W**Printing Issues:

You may manually install the printing control from Meade and Company named ScriptX by browsing to <u>www.financemaster.com/resources</u> and click ScriptX Install Utility or browse to FinanceMaster.com then click Support then click Resources on the bottom right then click ScriptX Install Utility.

#### INTERNET EXPLORER INFO FOR PRINTING FINANCE AGREEMENT

1. After selecting FINANCE AGREEMENT from the Print Forms Menu, click on the arrow to the right of the printer icon and click Page Setup:



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#### INTERNET EXPLORER INFO FOR PRINTING DRAFT

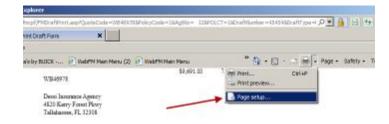
1. After selecting DRAFT from the Print Forms Menu, click on the arrow to the right of the printer icon:







2. Next, click PAGE SETUP:



3. Lastly, review the settings to match the following and click OK to save:

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#### Ø Reports

- Agency Logon Report
- Cancellations
- New Business
- Payments
- Quotes:

Click Excel to download:

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e .	\$953.90	\$66.85	18	\$* 234.00		Agent

- Ø Tools
  - Add General Agent
  - Add Insurance Company
  - Add Change Agent
  - Edit Welcome Text: This is the text that displays on the Agent Menu



#### INTERNET EXPLORER 10 SETTINGS:

98	
100	elerated graphics
	Use software rendering instead of GPU rendering*
	essbility
	Aways expand ALT text for images
	Enable Caret Browsing for new windows and tabs. Move system caret with focus/selection changes
	Play system sounds
	Reset text size to medium for new windows and tabs
	Reset zoom level for new windows and tabe
-	wsing
	Automatically recover from page layout errors with Compa
	Oose unused folders in History and Pavorites*
	Disable script debugging (Internet Explorer) Disable script debugging (Other)
	Display a notification about every script error
	Display Accelerator button on selection*
	Enable automatic crash recovery*
	Bhable PTP folder view (outside of Internet Explorer)
	Enable Suggested Sites Enable third-party browser extensions*
	Enable visual styles on buttons and controls in webpages
	Enable websites to use the search pane*
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	Check for server certificate revocation*
	Check for signatures on downloaded programs
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	Enable Enhanced Protected Mode*
	Enable Integrated Windows Authentication*
	Enable native XMLHTTP support Enable SmartScreen Filter
	Enable Strict P3P Validation*
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	Use SSL 3.0
	Use TLS 1.D
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	Use TLS 1.1
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