

WebFM™ MANUAL

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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 Internet Explorer. To browse to your site, simply type ‘fmwebsite.com/fmxxx.asp in the address bar of Internet Explorer:



AGENT LOGIN

Login Credentials

- ID is agency code;
- Password is \WinFM\Agency Maintenance\Agent\Agent's Web Access Password;
- If no password then use Phone Number;
- If no Phone Number then use ten zeroes.



ABC PREMIUM FINANCE COMPANY INC.

- Home
- Accounts
- Quotes
- Reports
- Tools

WELCOME TO OUR AGENTS MENU

Please note that the default down payment is now 25% instead of 30%. You can certainly select a higher down payment in a lower down payment please be aware that we require the policy fee be paid with the down payment. You can c

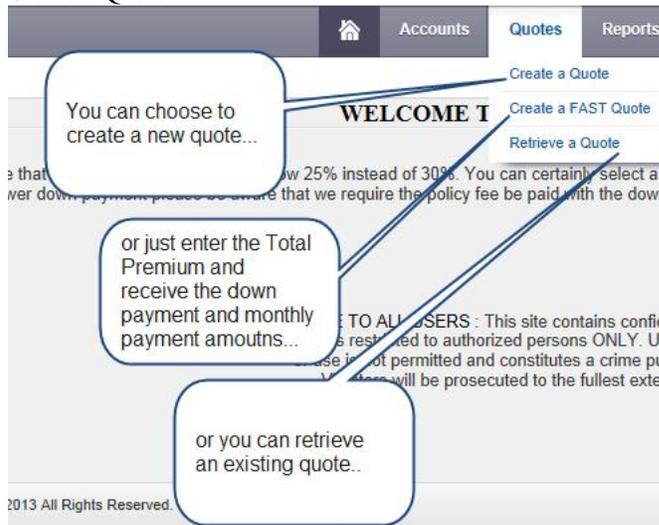
NOTICE TO ALL USERS : This site contains confidential information. Access is restricted to authorized persons ONLY. Unauthorized access or use is not permitted and constitutes a crime punishable by law. Violators will be prosecuted to the fullest extent of the law.

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:
Check or Credit Card;
Email confirmation will be sent to email address entered and to finance company.

Ø Quotes

- Create a Quote:



Once you click 'Create a Quote' you must enter the Insured Name (first name first) then select an insurance Company then select a MGA and then select Policy Coverage. Lastly you must enter the Policy Amount and choose the Rate Plan:

POLICY INFORMATION

Insured Name: ←
 Company: ←
 MGA: ←
 Policy Coverage: ←
 Policy Amt: ←
 Policy Fee: Financed: No Yes
 Policy Tax: Financed: No Yes
 Policy Type: Commercial Personal
 Policy Term: 6 12 24 36
 Policy Status: New Renew

Select a Rate Plan: →
 Inception Date: 
 Policy Number:
 Assigned Risk: No Yes
 Auditable: No Yes
 Other: No Yes
 Short-Rate: No Yes
 Minimum Earned: None 25% 50%
 Days to Cancel: Standard Extended
 SR22 Amount:

After entering the minimum required data your page will look like this:

POLICY INFORMATION

Insured Name:
 Company: ←
 MGA: ←
 Policy Coverage: ←
 Policy Amt:
 Policy Fee: Financed: No Yes
 Policy Tax: Financed: No Yes
 Policy Type: Commercial Personal
 Policy Term: 6 12 24 36
 Policy Status: New Renew

Select a Rate Plan: ←
 Inception Date: 
 Policy Number:
 Assigned Risk: No Yes
 Auditable: No Yes
 Other: No Yes
 Short-Rate: No Yes
 Minimum Earned: None 25% 50%
 Days to Cancel: Standard Extended
 SR22 Amount:

Add Lien Holder(s) to this Policy

Next, please click 'Save Quote' to proceed to the Quote Summary page:

WB16482 QUOTE SUMMARY

Advanced Insurance Agency John Doe	Quote Number	Rate Chart: STD
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FEDERAL TRUTH IN LENDING DISCLOSURES

Total Contract	Down Payment	Doc Stamps	Amt Financed	Number of Payments	Setup Fee	Bonus Amt	Interest	Total Finance Charge
\$1,234.56	\$308.64	\$0.00	\$925.92	9	\$10.00	\$0.00	\$40.85	\$50.85

PAYMENT SCHEDULE

Total of Payments	Annual % Rate	Payment Amount	First Due Date	Billing Frequency
\$078.77	15.00	\$108.53	11/16/2013	Monthly

[Finish and Print Forms](#)
 [Add Policy](#)
 [Copy Quote](#)

POLICY INFORMATION

Insurance Company	Policy Number	Effective Date	Term	Policy Total	Coverage Type	General Agency
COMPANION PROPERTY & CASUALTY		10/16/2013	12	\$1,234.56	Commercial Property	FENLEY GENERAL AGENCY

 Return to previous page

To proceed, click 'Finish and Print Forms' and you will see the Print Forms Menu. Choose to print Payment Coupons or Finance Agreement or Draft or Welcome Letter or other forms:

PRINT FORMS MENU

- [ACH Authorization](#)
- [Credit Card Authorization](#)
- [Draft](#)
- [Finance Agreement](#)
- [Payment Coupons](#)
- [Quote Agreement](#)
- [Welcome Letter](#)

 Return to previous page

- Create a FAST Quote:
 - Displays monthly payment amount;
 - No finance agreement or other forms available;
 - The fast quote number has two asterisks instead of 'WB';
 - Fast quotes may be retrieved and upgraded to Regular Quotes.
- Retrieve a Quote:
 - Retrieve by Quote Code or DBA or Name or Policy Number or Date Range;
 - Upon completion of quote, choose to print Payment Coupons or Finance Agreement or Draft or Welcome Letter or other forms.



Printing Issues:

You may manually install the printing control from Meade and Company named ScriptX by browsing to www.financemaster.com/resources 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:

Finance Agreement

WebFM Main Menu (2) WebFM Main Menu

PREMIUM FINANCE AGREEMENT

Print... Print preview... Page setup...

Insured(Name and Address as shown on the policy)
 TRACY FANT-KING
 9 WOODLAND AVE 2ND FL
 MONTCLAIR, NJ 07042
 1TRACYKING@GMAIL.COM (email)

Insurance Agency
 T
 NJ 07003
 i (H)

FEDERAL TRUTH AND LENDING DISCLOSURES

	B) Down Payment	C) Amount Financed	D) Finance Charge	E) Total Payments
	\$232.00	\$1,058.00	\$156.10	\$1,214.10
Age Rate	No. of Payments	Amount of Payments	First Installment Due	Installment Due Dates
	10	\$121.41	8/19/2013	Day 19th of each month

SCHEDULE OF POLICIES

Effective Date of Policy/Inst	Name of Insurance Company and Name and Address of General or Policy Issuing Agent or Intermediary	Type of Coverage	Months Covered	Premium \$
7/30/2013	NEW JERSEY PAIP	Auto Assigned Risk	12	\$1,290.

The above named Insured ("the Insured") is the debtor. Foremost Enterprises Inc., ("FEFS") is the lender to whom the debt is owed. "Insurance policy", "insurance policy" or "policy" and "premium" refer to those items listed under the "Schedule of Policies". Singular words mean plural as required in order to give the agreement meaning.

NOTE: 1. Do not sign this agreement before you read it or if it contains any blank space. 2. You are entitled to a completely copy of this agreement. 3. Under the law, you have the right to pay off in advance the full amount due and under certain ons to obtain a partial refund of the service charge. 4. Keep your copy of this agreement to protect your legal rights.

INSURED AGREES TO THE TERMS SET FORTH ABOVE AND ON THE SECOND PAGE OF THIS AGREEMENT.

SIGNATURE OF INSURED OR AUTHORIZED REPRESENTATIVE TITLE DATE

AGENT OR BROKER REPRESENTATIONS

reads and agrees: (1) the policies are in full force and effect and the information in the Schedule of Policies and the premiums are correct. 2. I

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

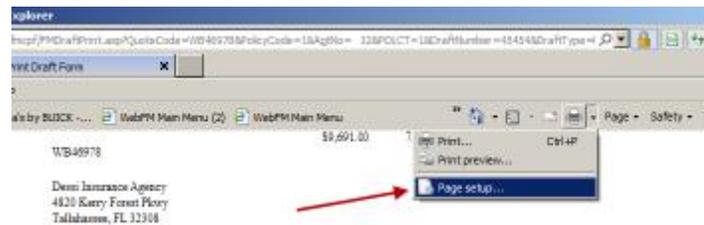


INTERNET EXPLORER INFO FOR PRINTING DRAFT

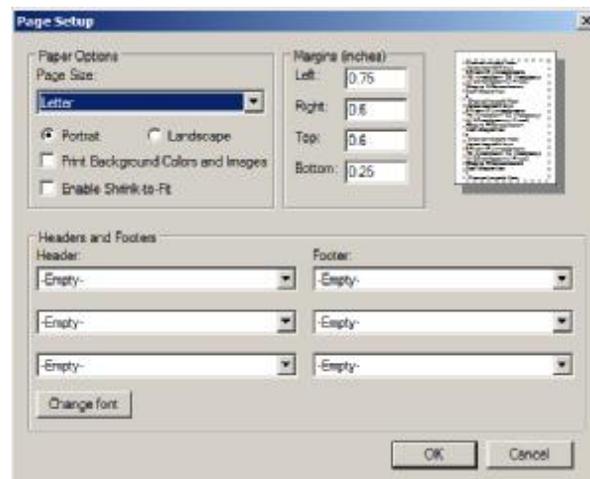
1. After selecting DRAFT from the Print Forms Menu, click on the arrow to the right of the printer icon:



2. Next, click PAGE SETUP:



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



Ø Reports

- Cancellations
- New Business
- Payments
- Quotes

Notice you may download the report to an Excel file:

Maintenance	Payments	Quotes	Reports	Tools
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WEB QUOTE REPORT						
ITEMS: - 19 SORTED BY: AGENCY CODE						
NAME	AMT FIN	FIN CHARG	APR	TOTAL CONTRACT	REP CODE	CREATED BY
#	\$963.80	\$66.08	18	\$1,234.00		Agent



- ∅ Tools
 - Change Agency Password