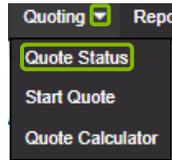Any saved quote that has not been accepted or electronically sent to IPFS can be viewed under Quote Status.

From the menu, select Quoting > Quote Status

Quote Status Screen

Associated Entity – Insurance Provider selection dropdown available for those with multiple, linked providers.

Initial View

Action - Click the ⠿ to access options on the quote Email Again, View PFA and View Payment Options.

Entered - Date of quote.

Customer # - Number assigned by the provider to help identify the insured.

Acct # - Recently booked accounts will show in quote status for 45 days.

DP Type - Shows how the down payment was paid. ACH, CC or blank.

DP Paid - Down payment or paid in full date.

Scrolled View

PIF Funding Date – Actual date of payment.

Effective Date – First policy effective date on the quote.

DP% / #PYMT – Terms of the quote.

User – Creator of the quote.

Search Features

Text or Numerical Search	Date Selector	Dollar or Percentage
Search Fields Contains or Starts With		>, < or =

Functions

Check the box next to the quote and select Copy, Delete, or Revoke.

Copy – Will create a copy of the quote and assign a new quote number. You can then edit the quote.

Delete – Will move the quote to inactive.

Revoke – Not available if the quote has already been signed by both parties or a payment has been made. Revoking an IPFS TotalPay quote that has been sent to the insured for signature will return the quote to inactive status.

New Quote – Start a new quote.