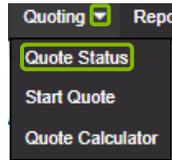




Any saved quote that has not been accepted or electronically sent to IPFS can be viewed under Quote Status.

From the menu, select Quoting > Quote Status



Quote Status Screen

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

Status:

- All Active Quotes
- All Quotes and Recently Booked eSign
- Pending Exception
- Paid in Full
- All Active Quotes
- Inactive Quotes and Loans

Default, can be changed

Quote Status

Status: All Active Quotes

Group By: Copy

View Status Descriptions

Search Criteria:

Contains Starts with Click on column header to change search Search

Records sorted by: Insured

Total records: 6

Click to launch on-screen guidance

eSign status descriptions

Initial View

Action	Entered	Quote #	Policy #	Customer #	Acct #	Status	DP Type	DP Paid	Agent	Insured
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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.

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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

<p>Text or Numerical Search</p> <p>Search Fields Contains or Starts With</p> <p>Contains Starts with <input type="text"/> <input type="text"/> Search</p>	<p>Date Selector</p> <p>Status: <input type="text"/></p> <p>Search Criteria: <input type="text"/></p> <p><input type="text"/> <input type="text"/> <input type="text"/></p> <p>Su Mo Tu We Th Fr Sa</p> <p>6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31</p>	<p>Dollar or Percentage</p> <p>>, < or =</p> <p><input type="text"/> <input type="text"/> <input type="text"/></p> <p>Records sorted by: DP %</p>
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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.

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