



AFCO has committed to [Focus on You](#) in 2018 and beyond. A key element to that focus includes enhancing our technology to improve the premium finance quoting experience.

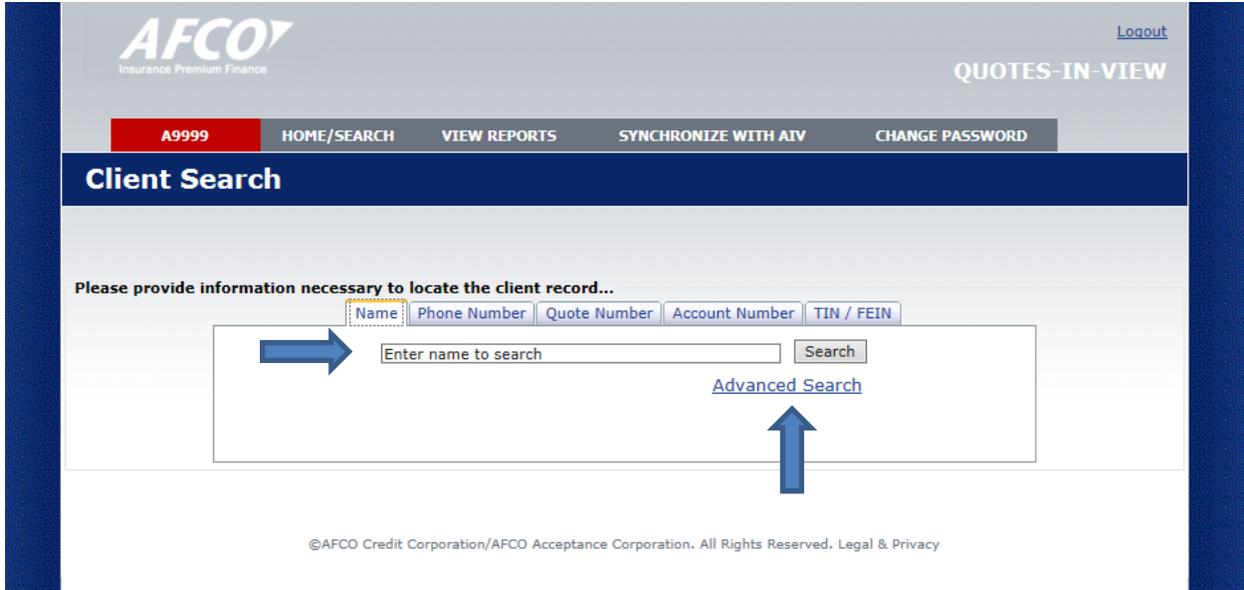
Beginning in February, you will see some changes to our online quoting system designed to help you identify your clients in the system and efficiently turn around account renewals. Below are some of the highlights of changes you can expect to see.

Once you've successfully logged in to AFCO's QIV quoting system, click on the **'New Quote'** button just as you have in the past to start the process for generating premium finance quotes for your clients.

The screenshot displays the AFCO Insurance Premium Finance web application interface. At the top left is the AFCO logo. At the top right is a 'Logout' link and the text 'QUOTES-IN-VIEW'. Below this is a navigation bar with buttons for 'A9999', 'HOME/SEARCH', 'VIEW REPORTS', 'SYNCHRONIZE WITH ATV', and 'CHANGE PASSWORD'. The main content area is titled 'Home / Search'. A blue arrow points to the 'New Quote' button. Below this are 'Retrieve Quote' and a search input field with the instruction '(Enter search text or leave blank to view all)'. The 'Search Options' section includes radio buttons for 'Insured Name', 'Quote Number', and 'Customer Number', each with an associated input field. The 'Advanced Search' section includes radio buttons for 'Agent Number', 'Quote Date', and 'Premium Amount (\$)', with date and range pickers. A 'Search' button is located below this section. The 'Entity Lookup' section includes a 'Lookup Entity' button, a dropdown menu set to 'Carrier', and an input field with the instruction '(Enter search text or leave blank to view all)'. At the bottom of the page is the copyright notice: '©AFCO Credit Corporation/AFCO Acceptance Corporation. All Rights Reserved. Legal & Privacy'.

Now you will be directed to our new 'Client Search' page to locate your client. By selecting the appropriate tab, you may search by Name, Phone Number, Quote Number, Account Number or TIN/FEIN.

To maximize your search results, you may enter a partial name into your search. To narrow your search further, you may click on the 'Advanced Search' link to include address information in your search.



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Once you've entered your client's information, please press enter or click on the 'Search' button to advance to the **Client Search Results** page.

Any potential matches will populate from your search. If you don't see your particular client already in the system, you may click on the 'New Client' button at the bottom of the page, and you'll be directed to the **Borrower Information** page to begin the quote process. If you identify one of the results as your client, you may click on the 'Select' link, as shown below.

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Insurance Premium Finance

Logout

QUOTES-IN-VIEW

A9999 HOME/SEARCH VIEW REPORTS SYNCHRONIZE WITH AIV CHANGE PASSWORD

Client Search

Please provide information necessary to locate the client record...

Name Phone Number Quote Number Account Number TIN / FEIN

ABC Search

[Advanced Search](#)

Action	ClientID	Name	Physical Address	Mailing Address	SSN / TIN	CIP Compliance
Select	164164	ABC Builder Inc	123 MAIN ST PASADENA CA 11111	123 MAIN ST PASADENA CA 11111	XX-XXX9898	No
Select	164165	ABC Landscaping LLC	111 MAIN ST PASADENA CA 11111	111 MAIN ST PASADENA CA 11111	XX-XXX5432	No

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If a client record is not located, Click here to create [New Client](#)

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Clicking on the 'Advanced Search' link expands the fields to include the address fields. Clicking on the 'Less' link will hide the address fields.

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QUOTES-IN-VIEW

A9999 HOME/SEARCH VIEW REPORTS SYNCHRONIZE WITH AIV CHANGE PASSWORD

Client Search

Please provide information necessary to locate the client record...

Name Phone Number Quote Number Account Number TIN / FEIN

ABC Search

Less

Address 123

City State Select One Zip Code

Action	ClientID	Name	Physical Address	Mailing Address	SSN / TIN	CIP Compliance
Select	164164	ABC Builder Inc	123 MAIN ST PASADENA CA 11111	123 MAIN ST PASADENA CA 11111	XX-XXX9898	No

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If a client record is not located, Click here to create [New Client](#)

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Once selected, you'll see any recent quotes your agency has completed for the client. At this point, you may click on the **'Renew/Duplicate'** link to duplicate the prior quote information for a more efficient quoting experience on renewing accounts. In order to add a new account, click on the **'Add New'** button.

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QUOTES-IN-VIEW

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Client Quotes

Prior Quotes for ABC Builder Inc

Action	Name	Quote #	Account #	Total Premium	Amount Financed	Effective Date	Quote Date
Renew/Duplicate	ABC Builder Inc	000001449116A01		\$1,000.00	\$850.00	02/09/2018	02/09/2018

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Select from prior quotes to renew or Click here to [Add New](#)

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After clicking on the 'Renew/Duplicate' link or 'Add New' button you'll be taken to the **Borrower Information** page to begin updating any information necessary to complete the quote.

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QUOTES-IN-VIEW

[HOME/SEARCH](#) [BORROWER INFORMATION](#) [POLICY INFORMATION](#) [QUOTE RESULT](#) [QUOTE SUMMARY](#)

Borrower Information

Quote Number: 1449118-A **Insured:** ABC Builder Inc

* Items in **bold** are required...

Borrower Details	
Full Name(s):	ABC Builder Inc
Phone:	
Fax:	
Mailing Address:	123 Main St
City:	Pasadena
State:	CA
Zip Code:	11111
Policy Holder Desig:	Corporation
Is this the Producing Agent's mailing address?	
No	

Physical Address	
Physical address the same as Mailing address?	<input type="checkbox"/>
Address:	
City:	
State:	Select One
Zip Code:	

How Can We Identify The Insured/Borrower?	
Customer ID:	Taxpayer ID Number (TIN/EIN/FEIN) Re-Enter Customer Information
TIN/EIN/FEIN:	**.*9898

Once completed you will end up at the **Quote Results** page with the ability to **print or e-mail a Premium Finance Agreement (PFA) for your client.**

If you have any questions about these enhancements, your AFCO marketing representative will be happy to assist you.