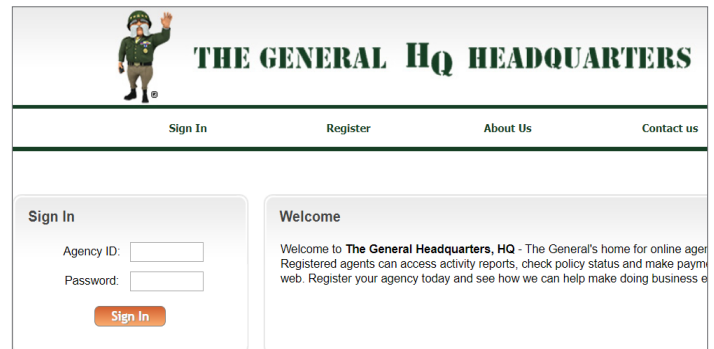




Getting Started

Be sure to bookmark as a favorite thegeneral.com/mars.

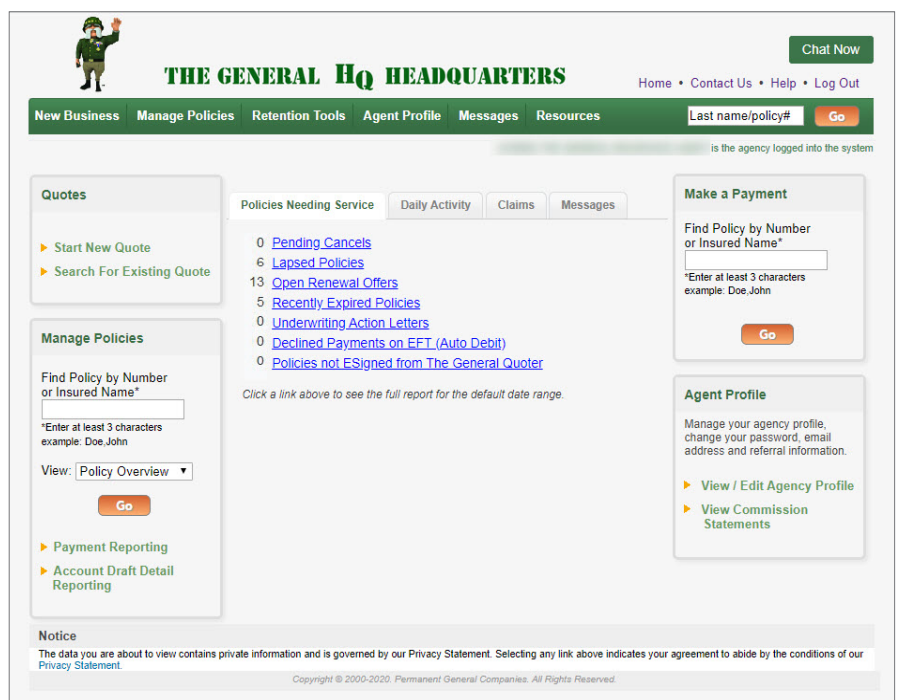
- Your Agency ID can be found on your welcome letter
- If you forget your password, you will need to retrieve your password



The General Headquarters

HQ provides easy access to the following agency tools:

- **New Business**
 - New Quote
 - Existing Quote
 - Quote Reports
- **Manage Policies**
 - Make A Payment
 - Endorsements
 - Policy Overview
 - ID Cards
- **Retention Tools**
 - Daily Activity Reports
 - Retention Tools
 - My Policies
 - Payment Reporting
- **Agency Profile**
- **Messages**





The General Headquarters (Cont.)

• Resources

- Underwriting Guidelines
- Forms
- About Us
- Training
- Contact Us

• Quotes

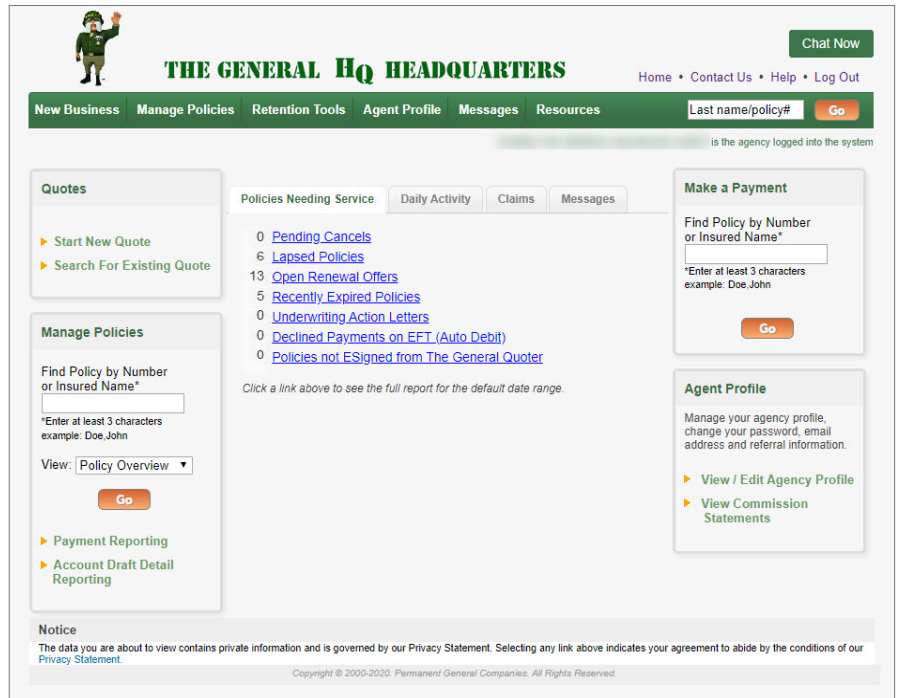
• Manage Policies

- Payment Reporting

• Make A Payment

• Agency Profile

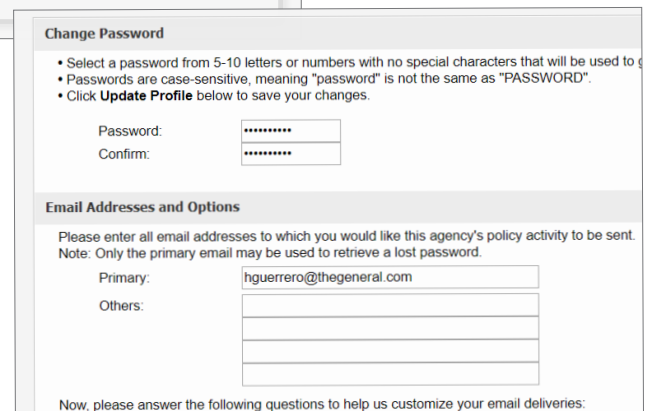
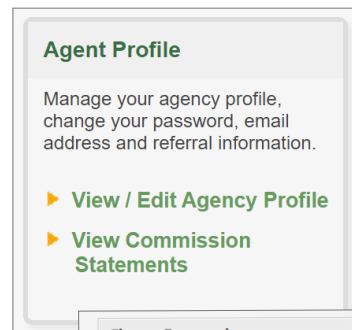
- View/Edit Agency Profile



Agency Profile

Manage agency information under agency profile:

- Change the agency password
- Add/Edit email address; up to 5 email addresses can be listed
- Set up daily activity emails to increase customer retention
- Add agency information under Referral listing to bring **MORE** business in the door





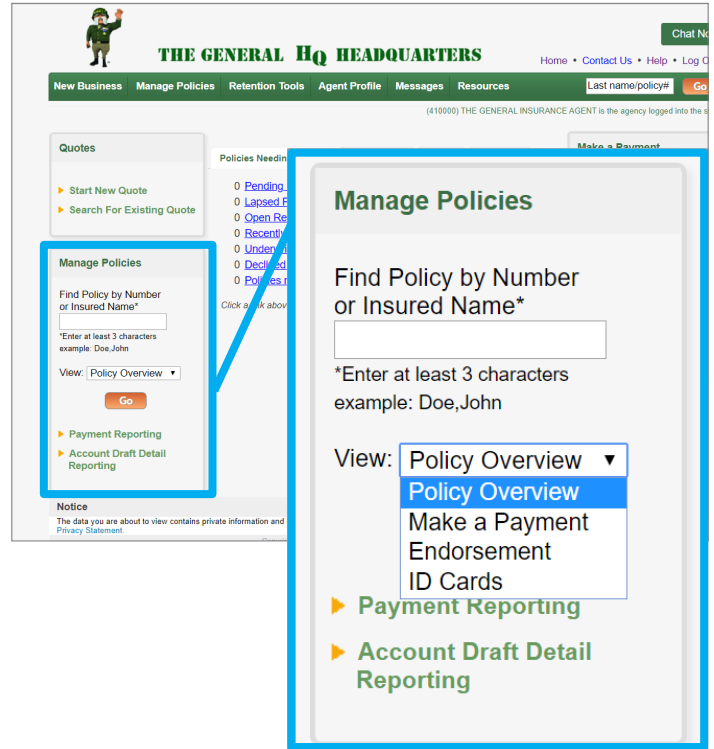
Manage Policies

Use the Manage Policies section to go directly into the following policy sections:

- Policy Overview
- Make a Payment
- Endorsement
- ID Cards

Also run reports to track payments and agency account draft detail.

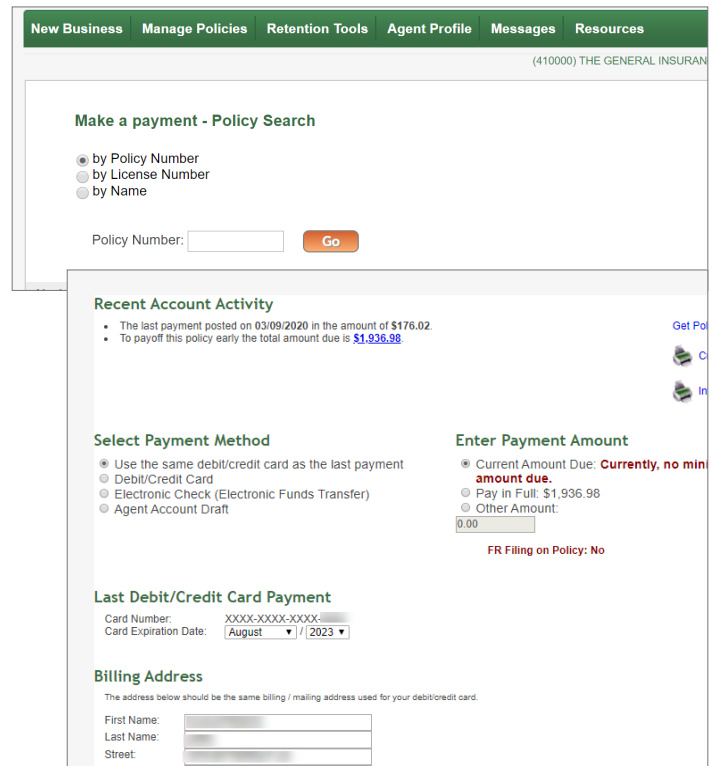
- Search by payment method, date, and amount



Make a Payment

Use the Make A Payment section found on the HQ homescreen to apply money to your policies.

- An overview of the policy status and amount due will be at the top of the screen
- Payments can be applied from customer credit/debit card, customer account draft, or agency draft
- Agency drafts are processed within 3 business days





The General Quoter

- You can start a New Quote or search for an existing quote in your system
- The General Quoter has 9 tabs for easy navigation while inputting data
- Effective dates can be up to 30 days in the future
- Use note pad for internal notes
- Be sure to provide accurate data, no dummy information

Pick Your Due Date

Provide flexibility to customers by choosing their due date.

1. Select payment plan on Rating Info Tab
2. On Quote tab select due date from drop down
3. Recalculate quote to see down payment adjustment

Consumer Reports

- The first three consumer reports are run simultaneously, and the remaining reports are run individually
- All consumer reports must be run in order to bind
- Green check mark means report is complete
- Quotes are subject to change prior to completion of reports
- Do not run MVR until client is ready to purchase the policy

Consumer reports status: Complete	
✓	1 Address Verification is complete
✓	1 Credit order is complete
✓	1 Prior Insurance Verification is complete (with exception, see below)
✓	1 MVR is complete
✓	1 CLUE is not needed
✓	Address Verification: Address verification is complete
✓	Credit ordering not required for this quote.
Amy Garcia: N/A	
✓	Proof of prior insurance may be required after the sale. Premium is subject to change.
✓	Driver 1: MVR process complete for Amy Garcia
✓	CLUE Drivers / Vehicles: A CLUE order is not required for this quote.



Accidents

- Accidents can be disputed at Point of Sale after the MVR and CLUE Reports are ran by reverting back to the "Rating Info" tab
- Accidents listed as "Not At Fault" will not be charged on the policy. Please submit proof to avoid future uprate

Validation

- Validating your quote ensures all information is input correctly
- If there are errors, the system will give you edits that will have to be fixed before continuing
- Edits will not go away until you attempt to validate again
- Validation is complete once you have a green check mark
- Closing method can be in office or eSign

Refill

- Use The General Quoter's refill option to quickly and easily rewrite your customers
- Verify all customer data
- Update information as needed



Manage Policies

Maintain business using the following tools and quick links:

- Policy overview
- Print ID cards
- Transaction History
- Claims Activity
- SR Filing Activity
- Verify Coverage
- Loss History
- Letter of Experience
- Payment Correction
- Endorsement Quotes

Endorsements

- Start each endorsement as a quote
- The price is updated before you hit the submit button
- Add vehicle/driver, update customer data, and change coverage
- You must submit quote in order for changes to be processed
- For a more detailed training guide, go to The General HQ home page, select Training and then TGQ – New Business Quoting