



Quick Start Guide

(877) 222 – 4586 option 1 *For Agents*

www.pgac.com/mars

GETTING STARTED

- Be sure to bookmark **pgac.com/mars** as a favorite.
- Your Agency ID can be found on your welcome letter.
- If you forget your password, contact one of the Inside Sales Reps.

Sign In

Agency ID:

Password:

[Sign In](#)

Welcome

Welcome to **The General Headquarters, HQ** - The General's home for online agent services. Registered agents can access activity reports, check policy status and make payments over the web. Register your agency today and see how we can help make doing business easier.

The General Headquarters, HQ

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
- Resources
 - Underwriting Guidelines
 - Forms
 - About Us
 - Training
 - Contact Us
- Quotes
- Manage Policies
 - Payment Reporting
- Make A Payment
- Agency Profile
 - View/Edit Agency Profile



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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

Agent Profile

Manage your agency profile, change your password, email address and referral information.

- ▶ [View / Edit Agency Profile](#)
- ▶ [View Commission Statements](#)

Change Password

Please select a password from 5-10 letters or numbers with no special characters that will be used to gain access to this site.
Note: Passwords are "case-sensitive", meaning "password" is not the same as "PASSWORD".

Password:

Confirm:

Email Addresses and Options

Please enter all email addresses to which you would like this agency's policy activity to be sent.
Note: Only the primary email may be used to retrieve a lost password.

Primary:

Others:

Now, please answer the following questions to help us customize your email deliveries:

Daily activity emails should contain:

My email client is capable of receiving HTML-formatted mail:

COMMISSION

Commission statements can be accessed under Agency Profile.

- Statements are available in excel or PDF format
- Viewable on the 3rd business day of each month
- Commissions are paid via direct deposit on the 4th business day of each month

Commission Statements

Agents -

To view the commission statement in a printable format, click on the pdf image in the forms column.
To view the commission statement in an excel spreadsheet, click on the excel image in the excel column.

Commission Statement Totals = 2

From 01/01/ to 12/31/.

Date

Forms

Excel

Agency -

Ran on: 09/04/2013- For Period Ending: August 31, 2013



Agency -

Ran on: 09/04/2013- For Period Ending: August 31, 2013





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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**
INSURANCE

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The General Quoter – New Business

- 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

THE GENERAL® QUOTER

Insd Name: JERRY JEN Pol Type: Personal Auto
 Agent: CORY WASHMUSSEN Effective Date: 07/24/2013
 Quote #: 20041729 Down Payment: \$113.00 Total Premium: \$454.00
 Payments: \$76.10

Not Validated

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.

Quote Summary

Term: 12 months Pay Plan: 10% down, 11 monthly payments Due Date: 26

CONSUMER REPORTS

- Consumer 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

Consumer reports status: Complete

- ✓ 1 Address Verification is complete
- ✓ 1 Credit order is complete
- ✓ 1 Risk Verification is complete
- ✓ 1 MVR is complete
- ✓ 1 ADDs is complete
- ✓ 1 CLUE is complete



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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 update

Accidents/Violations:

Incident #1	<input type="text" value="Speeding"/>	Date:	<input type="text" value="4"/>	<input type="text" value="23"/>	<input type="text" value="2011"/>	MVR
Incident #2	<input type="text" value="Speeding"/>	Date:	<input type="text" value="3"/>	<input type="text" value="24"/>	<input type="text" value="2011"/>	MVR
Incident #3	ACCIDENT	Date:	<input type="text" value="12"/>	<input type="text" value="15"/>	<input type="text" value="2010"/>	MVR

Dispute Accident:

- At fault
- At fault
- Not at fault

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.

Validation Status: **Validated**

Sign-up for Paperless:

Closing Method:

REFILL

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

Refill Customer Information?

- No
- No
- Yes



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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

Policy # [REDACTED] Insured: [REDACTED]

Policy Overview Drivers Vehicles & Coverages Transaction History Claims Activity SR Filing Activity

Policy Status
 The last bill was generated on 10/2/2013 in the amount of \$113.23.
 The last payment posted on 8/31/2013 in the amount of \$106.00.
 To payoff this policy early the total amount due is \$955.07

Policy Details

Insured Contact Information	Agent Contact Information
[REDACTED]	[REDACTED]
	Assisting Agent
	[REDACTED]
	Source of Sale
	1000TN - TN Independent Sales
Policy Term Information	Discount Information
Effective Date: 08/04/2013	Renewal 2 Discount
Expiration Date: 08/04/2014	Transfer 1 Discount
Orig. Eff. Date: 08/04/2011	Star Level 55 Discount driver: 1
Commission Tier: L	
Pay Plan: Direct Billing [RP]	
12 months	
10% down	
10 payments	
Auto Debit: Not Available	

policy maintenance

- Make payment
- Endorsement manual
- Letter of Experience
- Loss History
- Reimburse NSF
- Payment Correction

Endorsement Quotes
 Start New Endorsement Quote

Renewal Quotes
 We are unable to provide a renewal quote at this time [Help](#)

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.

Policy: [REDACTED] Primary Insured: [REDACTED]
Term dates: 08/04/2013 - 08/04/2014

Tell us what you would like to do and we'll walk you through the rest:

- Reply to Underwriting Diary Letter/Request for Information** - obtain quote and/or submit policy change for processing. Select this option if you received a letter from us requesting additional information about the policy which will result in making a change to the policy.
- Make a Policy Change** - obtain quote and/or submit to underwriting for processing

Endorsement effective date selection

- The Endorsement effective date will be 10/17/2013.**
- If the effective date should be a day other than 10/17/2013, click here for options.**

The effective date that will be used is: 10/17/2013.

[Begin Quote](#)

Effect on Premium

Full term premium: \$11.00 increase ((\$844.00 to \$855.00))	Pro-rata term premium: \$10.76 increase ((\$825.43 to \$836.19))	Revised payment estimate: 10 pymts of \$78.18 Next payment due: 01/27/2013	Current payment due: 12/27/2012	Current Amount due: \$79.20
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Endorsement Status and Instructions

After looking at the changes you have requested we have provided an estimated premium quote. If you have described all of your desired changes, you may now [submit your request for processing](#). You may also continue to [make further changes to your request](#).

What's the next step?

- ✦ [Submit Changes](#) (By choosing "Submit Changes" you are accepting the changes requested.)
- ✦ [Make changes/corrections to this request](#)
- ✦ [View/Print Endorsement Request Forms](#)
- ✦ [View Endorsement Summary](#)
- ✦ [Copy This Quote For Customer Comparison](#)
- ✦ [Cancel Quote](#)