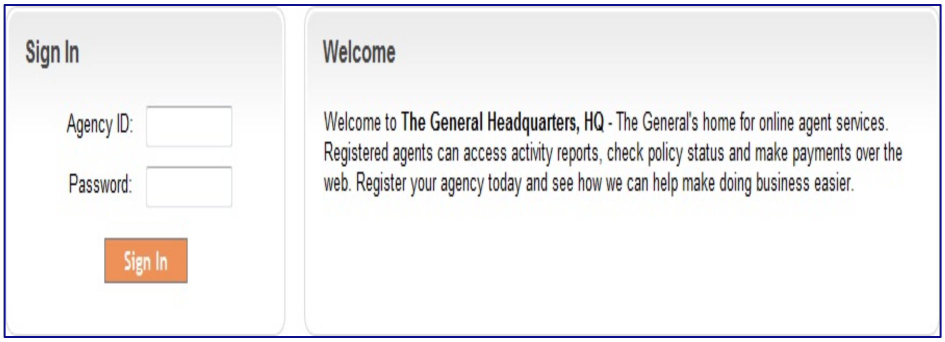
Quick Start Guide

(877) 222 – 4586 option 1 *For Agents* www.pgac.com/mars

GETTING STARTED

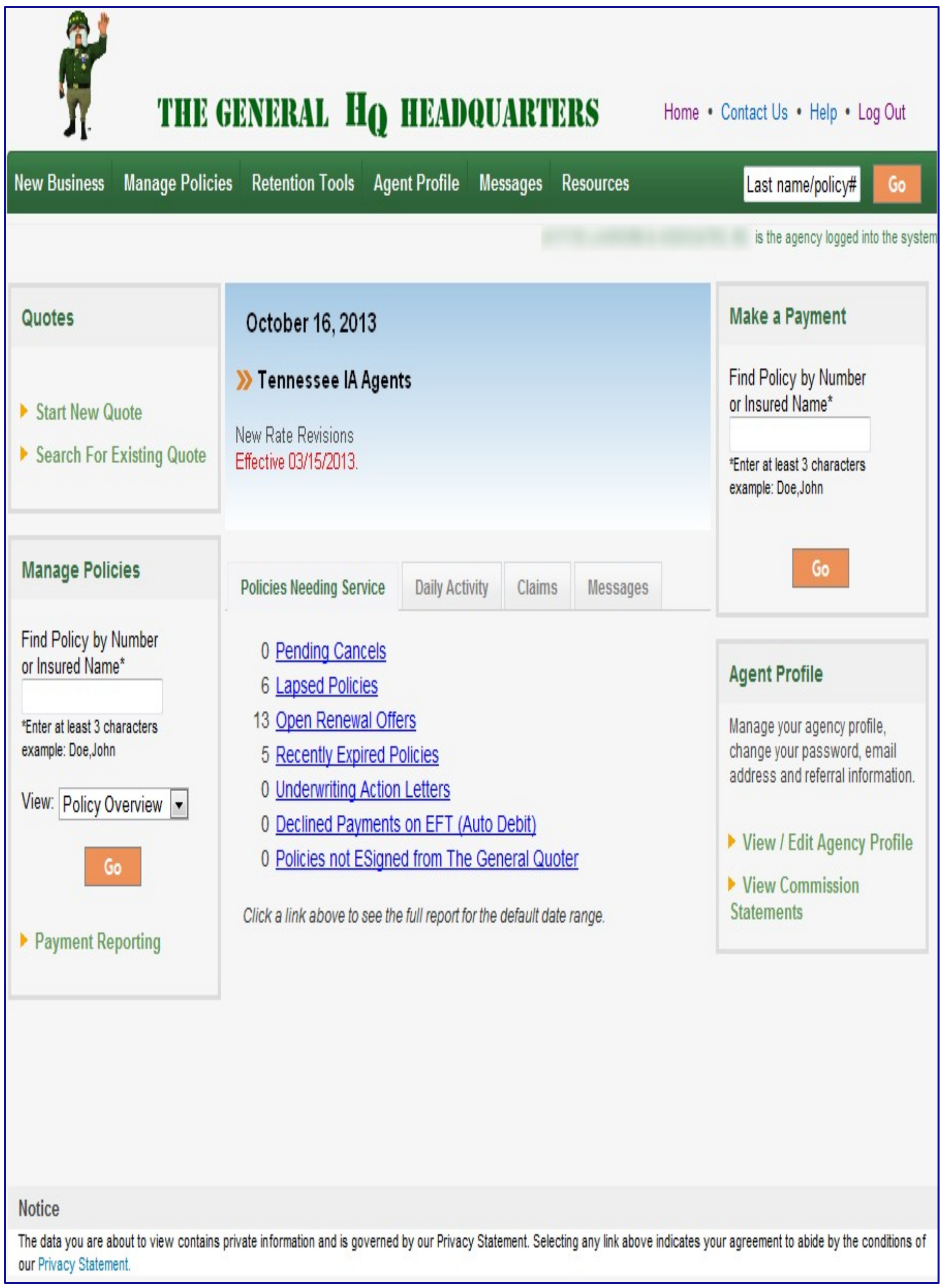
- Be sure to bookmark ***pgac.com/mars*** as a favorite.
- Your Agency ID can be found on your welcome letter.
- If you forget your password, contact one of the Inside Sales Reps.



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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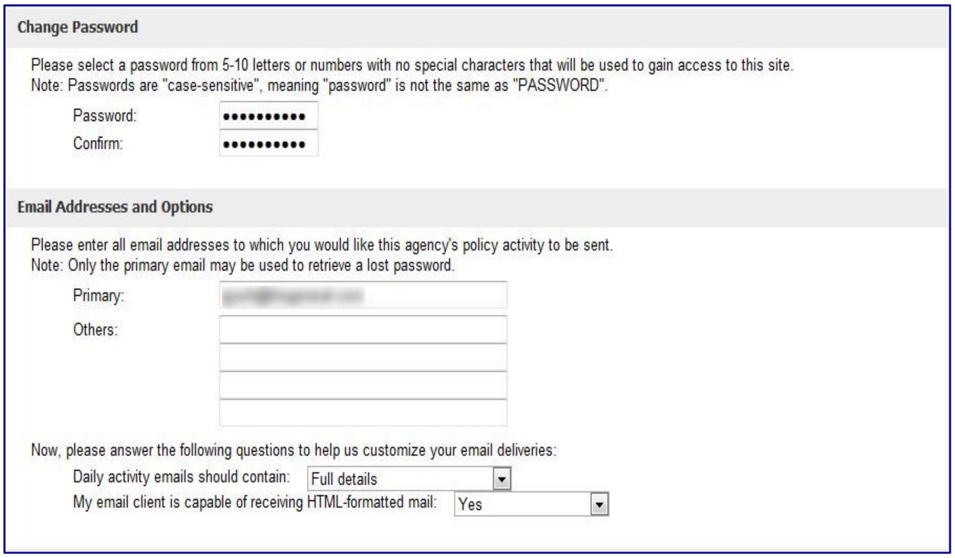
AGENCY PROFILE

Manage agency information under agency profile:

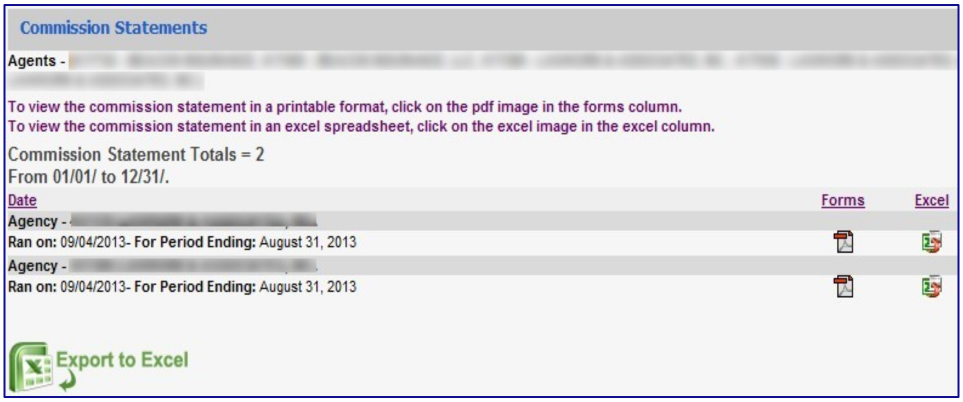
- Change the agency password
- Add/Edit email address; up to 5 email addresses can be listed
- Set up daily activity emails to increase customer retention
- Add agency information under Referral listing to bring **MORE** business in the door



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



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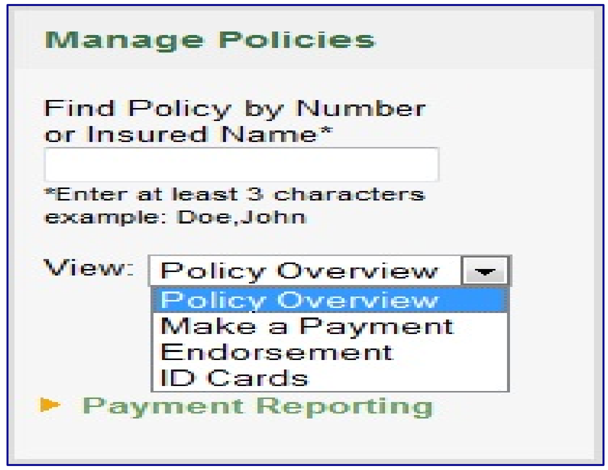
MANAGE POLICIES

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

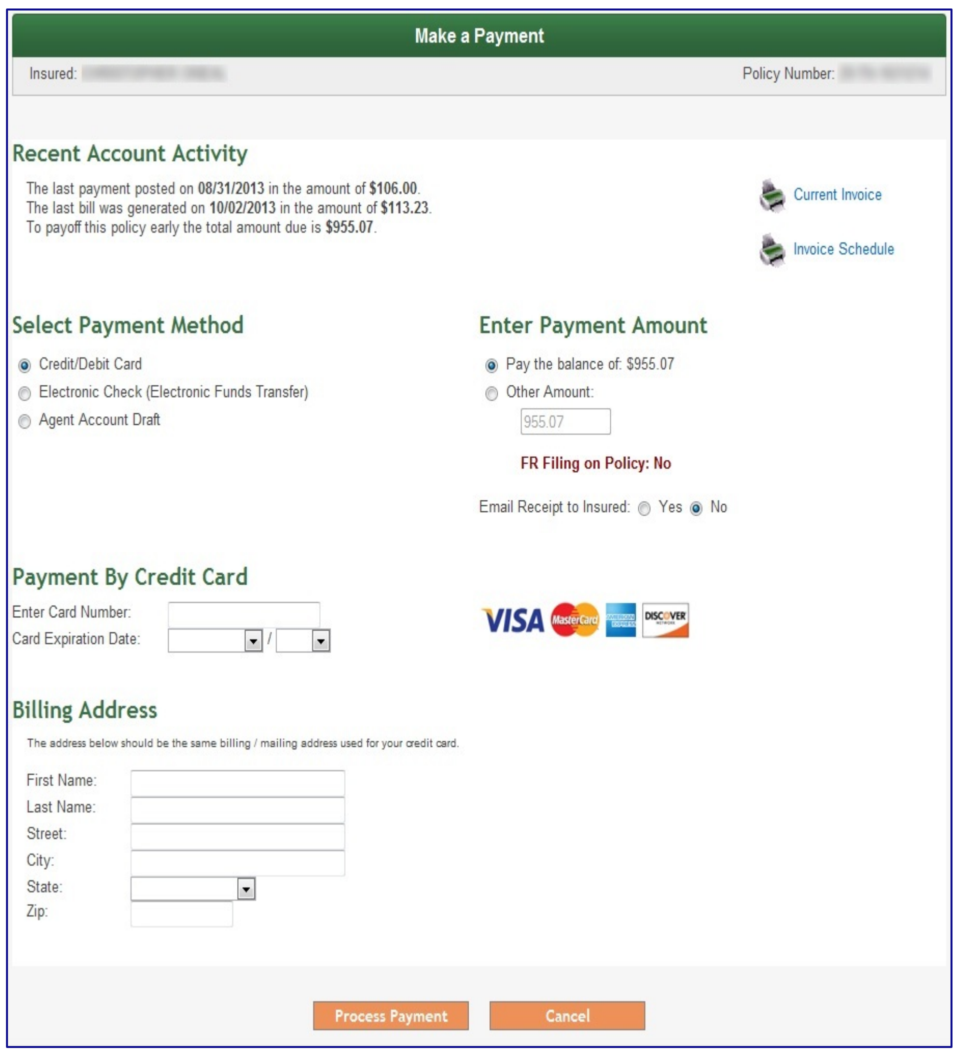
- Search by payment method, date, and amount



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



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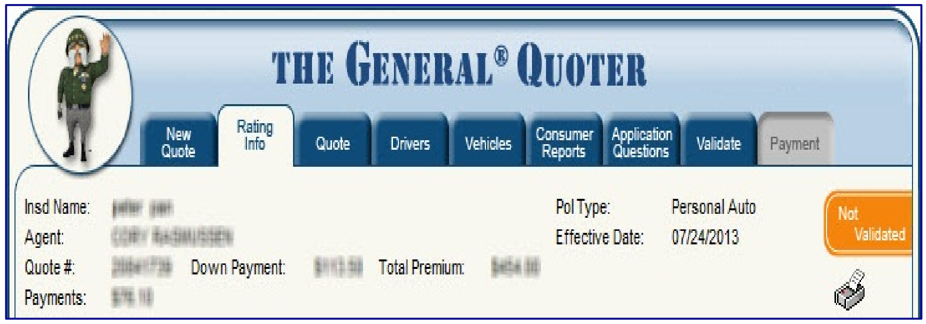
The General Quoter – *New Business*

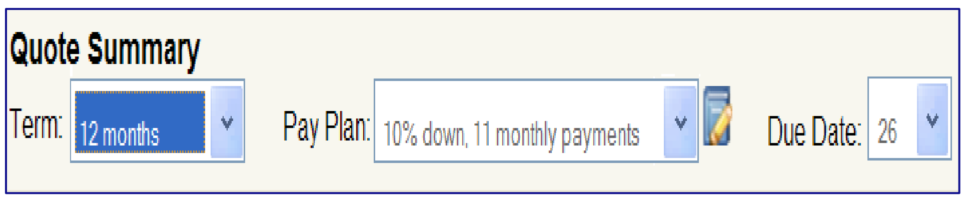
- You can start a New Quote or search for an existing quote in your system
- The General Quoter has 9 tabs for easy navigation while inputting data
- Effective dates can be up to 30 days in the future
- Use note pad for internal notes
- Be sure to provide accurate data, no dummy information



PICK YOUR DUE DATE

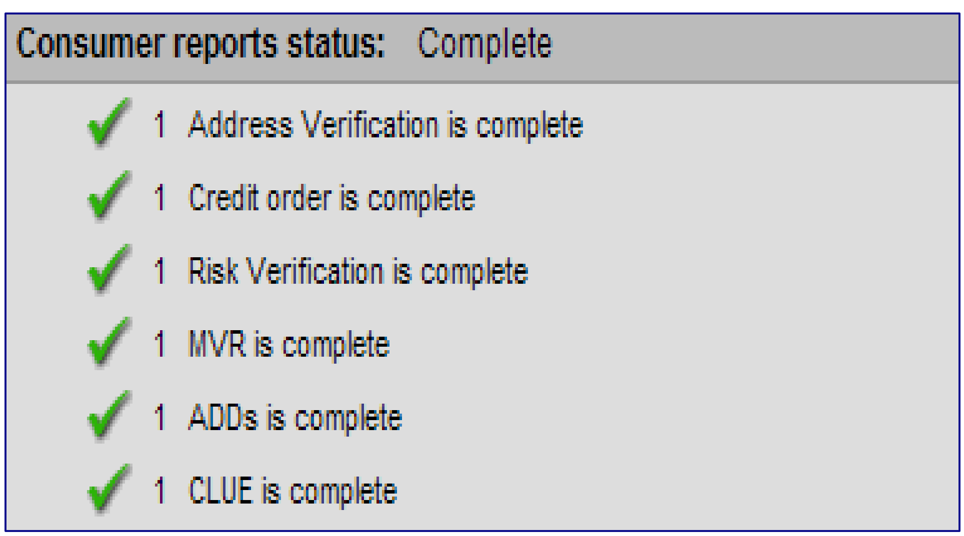
Provide flexibility to customers by choosing their due date.

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

- 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



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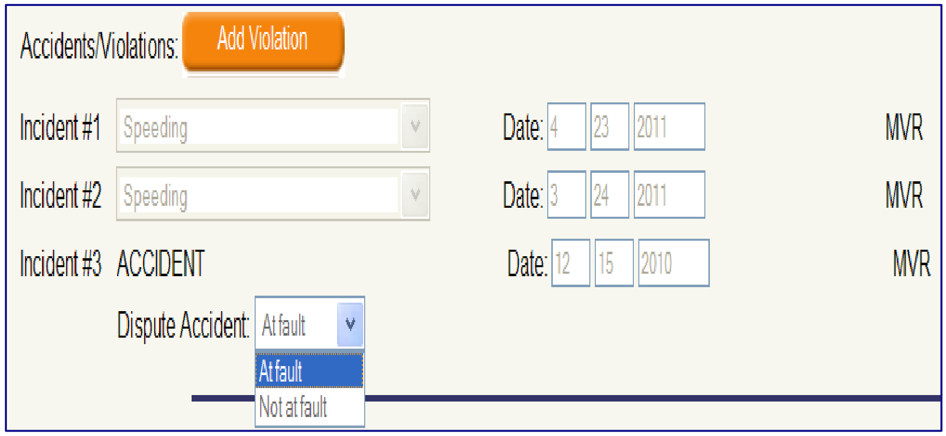
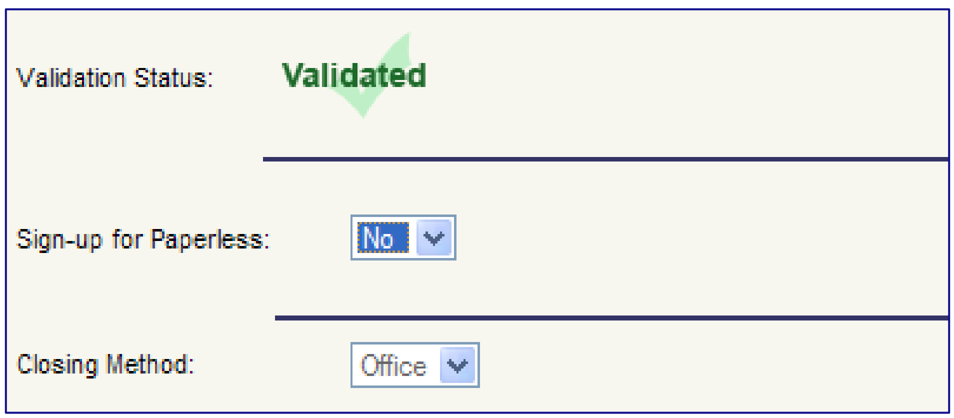
ACCIDENTS

- 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 uprate



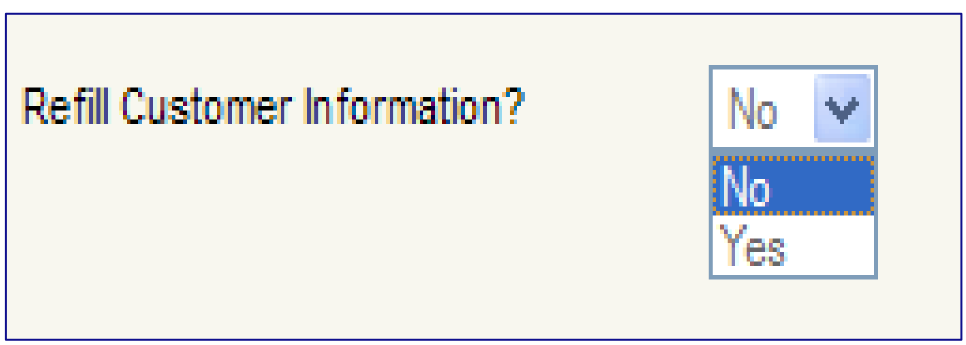
VALIDATION

- 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



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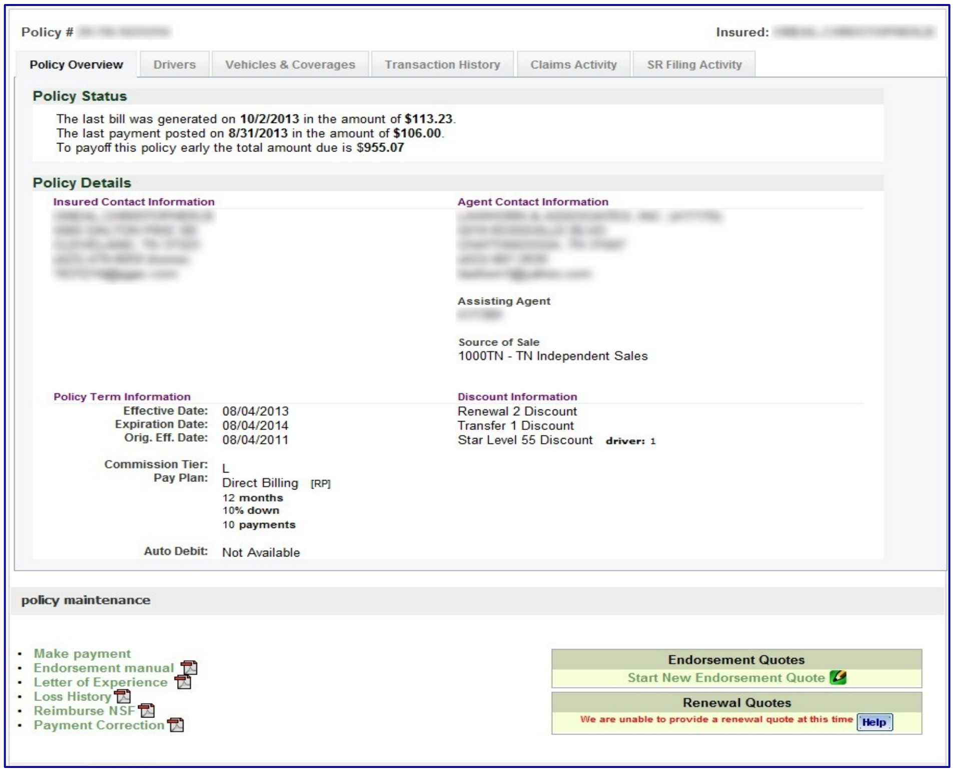
MANAGE POLICIES

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



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.