



National Partners
PREMIUM FINANCE

**One Platform.
One Partnership.**

PBS Digital Quoting Guide

FOR AGENTS

A clear, practical guide to quoting,
saving, signing, and submitting
premium finance agreements in PBS



REAL PEOPLE. REAL SOLUTIONS. REAL PARTNERS.

nationalpartners.com

PBS Digital Quoting Guide | v2026.10



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Logging In and Getting Set Up

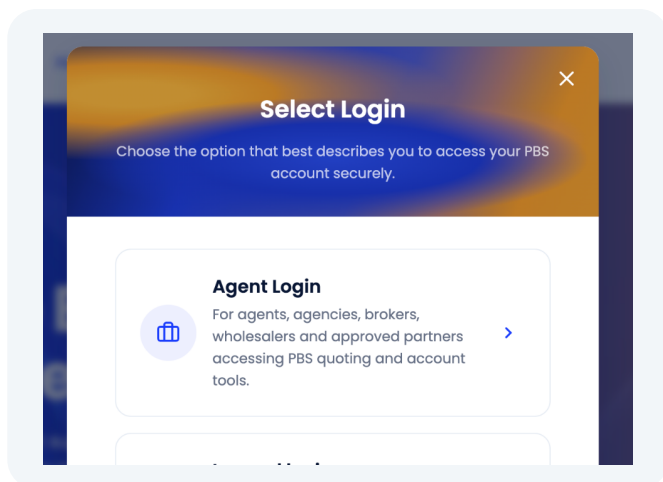
Access PBS securely and complete your initial login setup.

1 Visit nationalpartners.com

Select Login from the top navigation.

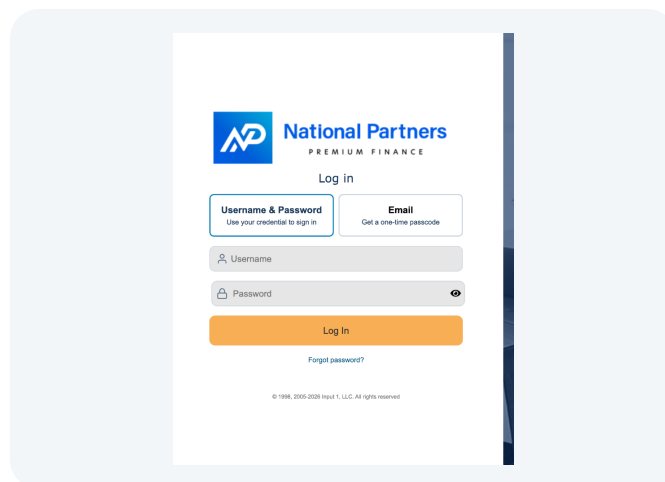
2 Choose Agent Login

Select Agent Login from the secure login window.



3 Sign in to PBS

PBS opens automatically—no account-number selection is required.



Sign-in options

Use your username and password, or select Email to receive a one-time passcode. If you forget your password, use [Forgot password?](#) on the PBS login screen.

Before you begin quoting

- Confirm you are working under the correct agency account.
- Keep your login credentials secure and do not share passwords.

Create a New Quote

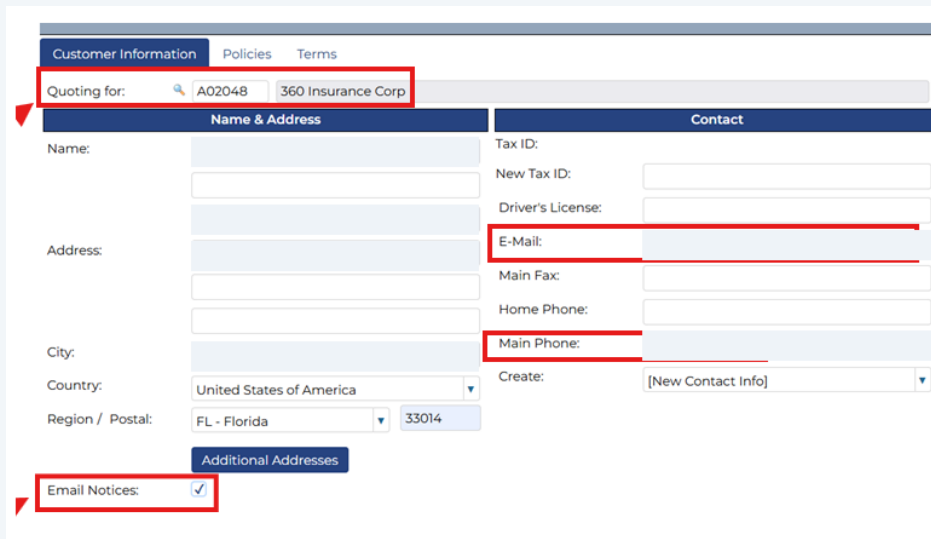
Start a quote from the PBS dashboard and enter the insured's contact information.

1 Start from Quick Links

Select Enter a New Quote from the PBS dashboard.

Critical step

Keep Email Notices checked so notifications are sent by email. If it is unchecked, notices may be sent by regular mail.



Required customer information

- Name
- Address
- Email
- Main phone

ACH information is optional

You may enter recurring payment details for automatic installment withdrawals. If the information is not available, National Partners can collect it later using an ACH form. ACH information populates the PFA, and a signature is required to authorize withdrawals.



Enter the Policy Information

Add coverage and financial details, then confirm the carrier and general agent.

Policy #	Eff Date	Carrier	Cover	Premium	Ern Fees	Fin Fees	Total	
1	TBI	7/2/2025	United States Liability Ins...	GL	4,700.00	520.00	150.00	5,370.00

5,370.00

Policy Detail (1 of 1)

Policy Number: TBI Coverage: GL - GENERAL LIABILITY

Effective Date: 7/2/2025 Policy Term (Months): 12 Addtl Days to Cancel: 0

Carrier: C00421 - United States Liability Insurance Company

Gen. Agent: G00046 - SECURITY UNDERWRITING MANAGERS (SUM)

SL Brokers:

Code	Name
------	------

1 Select coverage and effective date

Use the Policies tab to select coverage and enter the policy effective date.

2 Choose the carrier and general agent

Select the magnifying glass next to Carrier or General Agent, then search for the correct option.

Premium:	4,700.00	Return Method:	90% Pro-Rata
Earned Taxes/Fees:	520.00	Min. Earned Premium:	25.0000%
Financed Taxes/Fees:	150.00	Policy Commission:	0.0000%
Total Amount:	5,370.00	Filing:	0.00

☐ Filing ☐ Audit ☐ Assigned Risk

Complete the policy values

- Premium and applicable taxes or fees
- Minimum earned premium
- Additional policies, when needed
- Select Next after all policy details are complete

Carrier or general agent not listed?

Email quotes@nationalpartners.com
or call 305-269-1975.



Modify and Save the Terms

Review the terms the insured will receive, make any needed adjustments, and save the quote.

1 Review the available terms

Confirm the billing cycle, down payment, number of installments, APR, and referral fee.

Quote Variables		
Earned Broker Fee:		0.00
Down Payment:	25.000%	1,732.50
No. of Installments:		10
APR:		18.147%
Agent Premium Fin. Referral Fee:		0.00

Variables		
Earned Broker Fee:		0.00
Down Payment:	25.000%	1,732.50
No. of Installments:		10
APR:		20.997%
Agent Premium Fin. Referral Fee:		50.01

Update and save

2 Adjust the quote details

Enter the applicable terms for the quote.

3 Select Recalculate

PBS updates the down payment, APR, referral fee, and other affected values.

4 Select Save

A quote number appears at the top of the screen when the quote has been created successfully.

Quick check

Review the final terms before generating the Premium Finance Agreement.



Generate and Retrieve the PFA

Review the quote summary, generate the agreement, and retrieve it from Documents.

Financials		
Quoting For Premium Fin. Referral Fee:		50.38
Agent Premium Fin. Referral Fee:		34.58
APR:		18.049%
Doc Stamp Tax:		12.95
Total Premium:		5,370.00
Down Payment:	25.000%	1,732.50
Amount Financed:		3,650.45
Non Refundable Fee:		20.00
Finance Charge:		288.75
Total of Payments:		3,959.20
No. of Installments:		10
Installment Amount:		395.92

Quote - 87593 - MIGUEL VINAS

Customer Information Policies Terms Summary Documents Payments

Title	Description	Method	Creator	Date Created	Pages
ACH Authorization		Manual	Miguel Valdes	7/2/2025	1
Premium Finance Agreement		Manual	Miguel Valdes	7/2/2025	4

2 Items

Generate Notice: Premium Finance Agreement Now... Close

1 Review the quote summary

Confirm the final quote details before generating documents.

2 Open the Documents tab

Locate Premium Finance Agreement under Generate Notice.

3 Generate the agreement

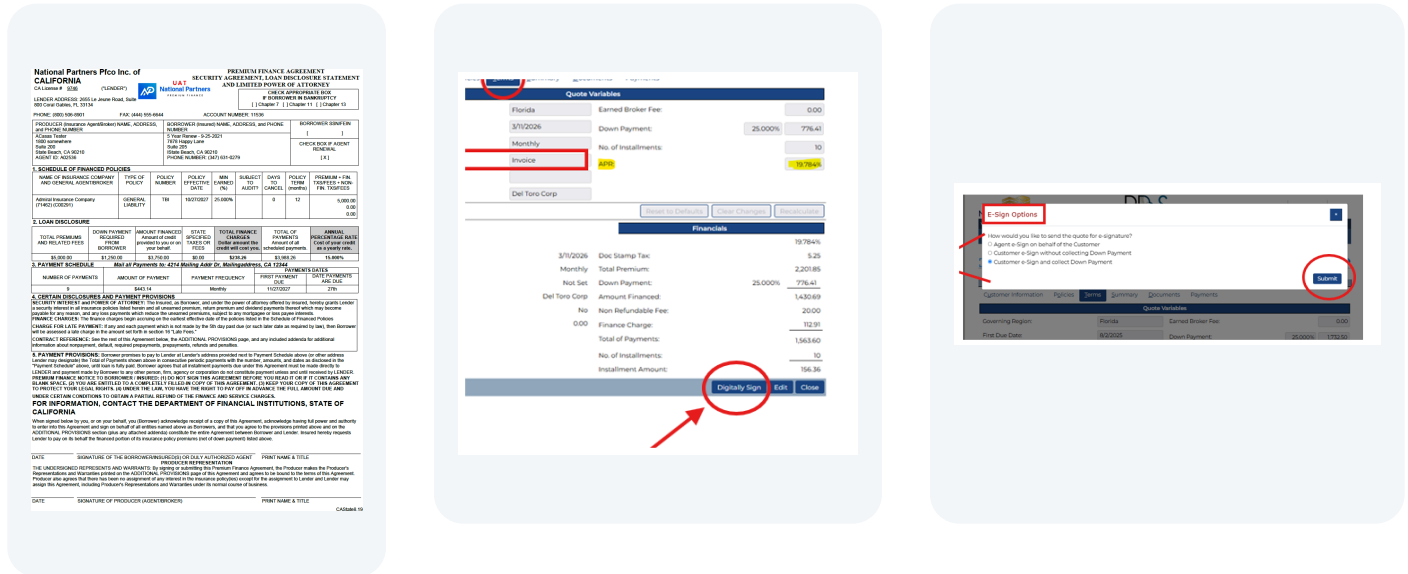
Choose Premium Finance Agreement, then select New to create the document.

Allow browser pop-ups

A pop-up blocked message may appear when the PFA is generated. Enable pop-ups for PBS so you can view and download the document.

Sign and Submit the PFA

Use the digital-signature workflow or complete a wet signature, then submit the signed documents.



1 Choose Digitally Sign

After the quote is saved, the button becomes available in the Terms tab.

2 Select an e-sign option

Choose the appropriate signature and down-payment option, then select Submit.

Ways to complete the PFA

Wet signature

Print, sign, and scan the agreement. Send the completed documents to contracts@nationalpartners.com.

Digital signature

Complete the approved electronic-signature method from the Terms tab. A confirmation email will be sent after the option is selected.

All signed documents must be sent to contracts@nationalpartners.com.

Help When You Need It

Use the right contact for quicker assistance with quotes, agreements, or account questions.



Quote Support

quotes@nationalpartners.com

Carrier or general agent not listed, or approval needed for specific quote terms.



Signed Documents

contracts@nationalpartners.com

Submit completed Premium Finance Agreements and other signed documents.



Customer Service

customerservice@nationalpartners.com | 305-269-1975

Questions about PBS, an existing agreement, or general support. Our team is ready to help.

Three reminders before you finish

- Keep Email Notices enabled so important notifications arrive by email.
- Allow browser pop-ups before generating the Premium Finance Agreement.
- Include the quote number when requesting approval or assistance.

Thank you for choosing National Partners.

Premium finance technology backed by responsive people and practical support.