NATIONAL PARTNERS

PREMIUM **FINANCING** SOLUTIONS

GUIDE

GETTING STARTED WITH PBS

PREMIUM BILLING SYSTEM

Follow our guide to seamlessly navigate our new PBS platform, designed to simplify quoting, reporting, and loan management for a more efficient experience.

Watch Video Tutorial

800-506-8901 | **www.nationalpartners.com**

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Logging In & Getting Set Up

For Agency Brokers

Agents

Important Note

Your username and temporary password will be emailed to you. For security reasons, update your password immediately after logging in. If you forget your password, use the "Forgot Password" option to reset it.

- Visit our **website** and **click "Agent"** in the top-right navigation bar.
- Select **"Agent (If your account starts with 1176)"** button on this screen.
- Or, directly **access the PBS portal here.**

Welcome to the PBS Platform

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Creating a New Quote

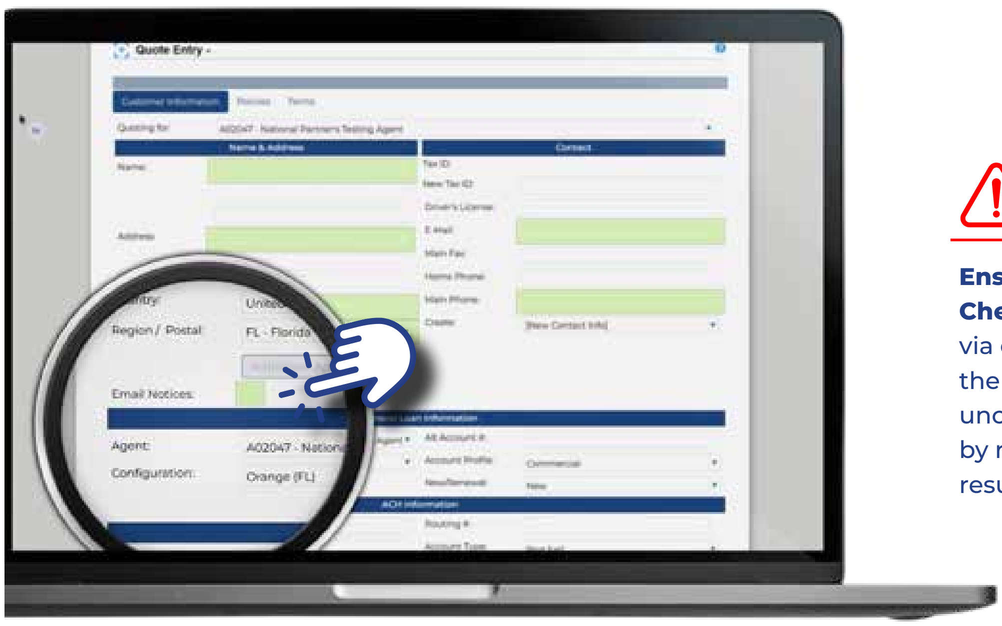
1

- From the Quick Links menu, select “Enter a New Quote.”

2

Entering Customer Information

- Fill in the required fields: *Name, *Address, *Email, and *Main Phone.



Critical Step

Ensure “Email Notices” is Checked. To receive notices via email, you must check the “Email Notices” box. If left unchecked, notices will be sent by regular mail, which may result in delays.

- **ACH Information (Optional):** Store the insured’s recurring payment details for automatic installment withdrawals. If unavailable, National Partners can collect this information later via an ACH form. **This information only populates the PFA; a signature is required to authorize and validate the withdrawals.**
- **Finalize Step:** Once all information has been entered, click **“Next”** to proceed.

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Entering Policy Information

- **In the Policies tab,** enter all required policy details, including:
    - Policy Number (if available)
    - Coverage
    - Effective Date
    - Carrier
    - General Agent
    - Base Premium
    - Earned Fees
    - Financed Taxes
    - Minimum Earned Premium
    - Policy Commission

- **Click the magnifying glass** next to the coverage field to open the **"Pick Coverage"** selection pane.

3

Selecting Coverage

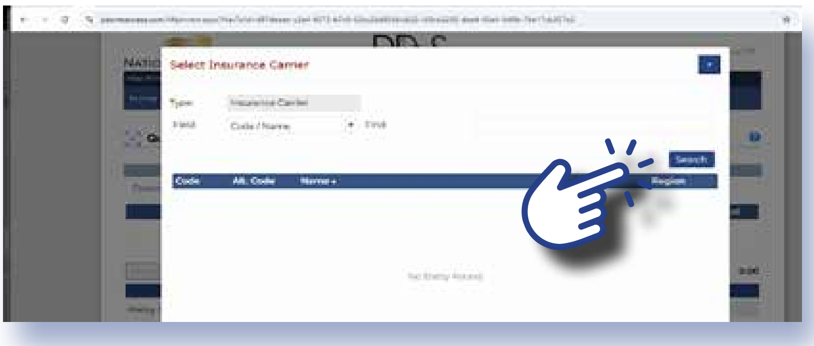
Critical Step

Ensure "Name" is selected, to search and choose the appropriate coverage type.

- In the **"Pick Coverage"** pane choose the appropriate coverage from the drop-down menu. **Ensure you select "Name", then click Search to confirm.**

Selecting Carrier & General Agent

- **Click the magnifying glass** next to the "**Carrier"** or **"General Agent"** field to open their respective selection panes, then type or search for the appropriate option.



Carrier or General Agent Not Listed?

If you cannot find the Carrier or General agent in the list, please contact us at: quotes@nationalpartners.com or call **305-269-1975** for assistance.

- **Adding Additional Policies:** To add another policy**, click "New Policy"** under the Policy section.
- **Finalize Step:** After entering all policy details, **click "Next" to proceed.**

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Modifying and Saving Terms

- In the **Terms** tab, you can adjust the quote terms. This tab displays all terms the insured will receive, including the **down payment and interest rate.**
- After making modifications, click **"Recalculate"** to update the **down payment, APR, and other details.**
- Once satisfied, click **"Save"**—a **quote number** will appear at the top, confirming the quote was successfully created.

Important Note

After saving, you will have the option to either **retrieve the PFA** or **begin the e-signature process.**

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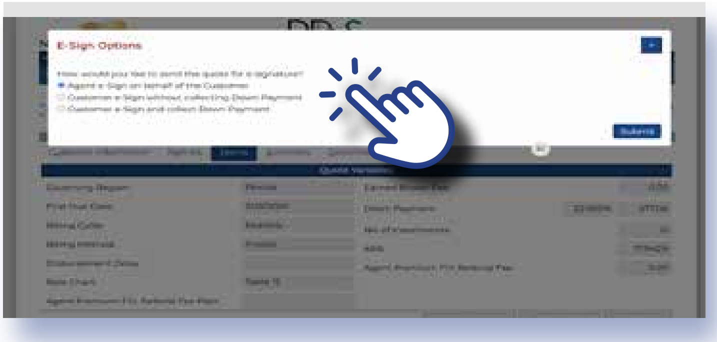
Digital Signature Option

- After saving, the **"Digitally Sign"** button will become clickable, giving you access to e-signature options. Once you select your signature type, a confirmation email will be sent to you verifying your signature authorization.



Generating & Retrieving PFA 5

Important Warning

When generating the Premium Finance Agreement **(PFA)**, a **browser pop-up blocked message** may appear. If this happens, enable pop-ups in your browser settings to view and download the document.

- After saving, go to the **Documents** tab, locate the **Premium Finance Agreement (PFA)** under the **"Generate Notice"** section, and click the **"Now"** button.

Submitting PFA Documents


National Partners

PREMIUM FINANCE AGREEMENT
SECURITY AGREEMENT, LOAN DISCLOSURE STATEMENT
AND LIMITED POWER OF ATTORNEY

NOTICE: (1) DO NOT SIGN THIS AGREEMENT BEFORE YOU READ IT OR IF IT CONTAINS ANY BLANK SPACE. (2) YOU ARE ENTITLED TO A COMPLETELY FILLED-IN COPY OF THIS AGREEMENT. (3) UNDER THE LAW, YOU HAVE THE RIGHT TO PAY OFF IN ADVANCE THE FULL AMOUNT DUE AND UNDER CERTAIN CONDITIONS TO OBTAIN A PARTIAL REFUND OF THE SERVICE CHARGES.

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- After retrieving the **PFA documents,** you can submit them **via email to:** **contracts@nationalpartners.com.**
- If approval is required, **send your request to quotes@nationalpartners.com** with the **quote number** and the s**pecific terms needing approval.**

Ways to Submit Signed PFA

1. **Wet Signature** – Print, sign, and scan the document.
2. **Digital Signature** – Use the approved electronic signature method, completed in the **Terms** tab **(see Step 4)**.

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

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THANK YOU

Need Assistance?

Our **Customer Service Department** is here to help!
For any questions or support, please reach us us at
customerservice@nationalpartners.com or at 305-269-1975.