

Logging In To New System

- Go to www.cappay.com
- Click on **AGENT SERVICES** at the top of the page
- Scroll down to **ON-LINE QUOTING**
- Press **CLICK HERE** next to **PBS NY (NEW CPP QUOTING PROGRAM)**
- At the login page, enter your user name and password. You will use the same credentials from our old program.
- Press **GO**

HOME PAGE

QUOTES: Press the blue QUOTES button to search for save quotes in the system. You will be able to search for quotes using different parameters (name, address, etc.).

ACCOUNTS: Press the blue ACCOUNTS button to search for accounts in the new system. You will be able to search for quotes using different parameters (**NOTE:** Only accounts starting with 1099- are in this system. Accounts starting with CPP- are in the old system and will not be moved over). You can also access this information from the CUSTOMER SERVICE quick links button.

REPORTS: Press the blue REPORTS button to run different reports. You can also access this information from the REPORTS quick links button.

ACCOUNTS SEARCH: Use this feature to search accounts using insured name only.

QUOTE SEARCH: Use this feature to search for saved quotes using insured name only.

E-PAYMENT WIZARD: Use this feature to submit bulk payments

AP QUOTING: Use this feature to quote additional premiums. (**NOTE:** Refer to additional premium supplement for AP instructions)

QUICK QUOTE: Use this feature to calculate finance figures only. (Refer to the Quick Quote section in this manual for instructions)

ENTER A NEW QUOTE: Use this feature to create finance agreements. (Refer to the Enter a New Quote section in the manual for instructions)

QUICK QUOTE

Similar to the old program, use Quick Quote for quick finance numbers. Press **QUICK QUOTE** in quick links.

- **Configuration:** This will default to 15% down payment for NYAIP business. Choose the 10% down payment configuration for all other types of business (Standard or NYAIP renewals)
- **New/Renewal:** This will default to new. Change to renewal if applicable.
- Change **Effective Date** or **Coverage** if applicable
- **Premium:** For NYAIP new business only, enter the premium not including the law enforcement fee. (Ex: NYPASS calculates the total premium for 1 vehicle to be \$1000. Enter \$990 in the premium field. Take out the \$10 LEF.) For all other types of policies, including NYAIP renewals, enter the total premium in this field including the LEF
- **Earned Taxes/Fees:** For NYAIP new business only, enter the law enforcement fee here. The fee is \$10 per vehicle. Leave as \$0 for all other business
- You do not need to enter any more information to get a quick quote
- Press **CALCULATE** button at bottom of screen

ENTER A NEW QUOTE

You will use this feature to create a finance agreement. Press **ENTER A NEW QUOTE** in quick links.

Customer Information

- Use Tab key to navigate from field to field
- **Name:** Enter both insured first and then last name in this field
- **Address:** Enter street address
- **City:** Enter city
- **Postal:** Enter zip code
- **Tax ID/SS#:** Enter insured social security number
- **E-Mail:** Enter insured email if they want to receive CPP correspondence via email instead of regular mail. If they do not have an email address leave this field blank. If left blank you must check **No Email Address** on the left side of the screen located below the insured city.
- **Home Phone:** Enter insured telephone number

No other information is required in the top section.

- **Configuration:** This will default to 15% down payment for NYAIP business. Choose the 10% down payment configuration for all other types of business (Standard or NYAIP renewals)
- **New/Renewal:** Choose new or renewal.
- **ACH Information:** Complete this section if the insured wants their monthly payments swept out of their checking account.
- Press **NEXT** to go to the policy page information. (**NOTE:** The program will not allow you to go to the next screen if any required information is missing)

Policy Information

- **Policy Number:** Defaults to **To Be Issued (TBI)**. Enter policy number if applicable
- **Effective Date:** Defaults to today's date. Change date if applicable

- **Coverage:** Defaults to **Auto Liability**. Change coverage if applicable by clicking on the magnified glass
- **Carrier:** Defaults to **NYAIP**. Click on magnified glass to search for another carrier by name
- **Premium:** For NYAIP new business only, enter the premium not including the law enforcement fee. (Ex: NYPASS calculates the total premium for 1 vehicle to be \$1000. Enter \$990 in the premium field. Take out the \$10 LEF.) For all other types of policies, including NYAIP renewals, enter the total premium in this field
- **Earned Taxes/Fees:** For NYAIP new business only, enter the law enforcement fee here. The fee is \$10 per vehicle. Leave as \$0.00 for all other business
- **Financed Taxes/Fees:** Leave this field as \$0.00. This is not for the broker fee
- Press **Save** at bottom of page.
NOTE: A message will appear stating, **To add another policy, click on the new policy button. If there are no additional policies, click next at the bottom of the page.** Click **OK** to dismiss the message
- Either click **New Policy** to add another policy to the finance agreement (Not Common) or press **Next** to go to the terms page

Terms

- **Billing Method:** This will default to **Coupon**. If you entered bank information on Customer Information page, choose **ACH**.
- **Broker Fee:** Enter broker fee if you include it in on the finance agreement. (**NOTE:** If you are including the broker fee you **must** press **Recalculate**)
- After you have made all necessary changes on this page, press **Save** at the bottom of the page. You will now be able to print the required documents. You will not be given the printing option unless you press **Save**

Printing Finance Agreement & 1st Payment Coupon

- Press **View Documents** button at the bottom of the page. This will bring you to the Documents Tab
- The list of documents box will be empty. **Premium Finance Agreement** will be the defaulted option in the **Generate Notice** field. Press **Now** button
- A confirmation message will appear. Press **OK**
- The finance agreement and 1st payment coupon will now appear in the list of documents.
- Click yellow field that appears at the top of the page that says, **Your document is now ready. Please click here to open it.**
- A new window will appear with the finance agreement and 1st payment coupon. The first page of the document is the Paperwork Checklist
- Print the document
- Close document window

If you print the draft, follow this next section, otherwise skip

Printing Draft

You must disable any pop-up blocker for the website to print the draft.

- After closing the finance agreement window, you will be back on the documents tab. Choose **Draft** in the **Generate Notice** field
- A confirmation message will appear. Press **OK**

NYAIP Drafts

- On the drafts detail page enter the **DP Required on the NYAIP Application** in the appropriate field. This amount is the 25% required and is found on the NYPASS application
- Enter **NYAIP DP Collected** in the appropriate field. This is the 15% down payment amount collected from the insured
- Press **OK**
- The draft will now appear in the list of documents
- Click yellow field that appears at the top of the page that says, **Your document is now ready. Please click here to open it.**
- A new window will appear with the draft information. Put special draft paper in your printer and print. (**NOTE:** You cannot print the draft on the 3 sheet drafts)
- Close draft window

All other drafts

- Choose **Carrier** in the **Payable To** field
- Choose **Total Premium** in the **Amount** field
- The draft will now appear in the list of documents
- Click yellow field that appears at the top of the page that says, **Your document is now ready. Please click here to open it.**
- A new window will appear with the draft information. Put special draft paper in your printer and print. (**NOTE:** You cannot print the draft on the 3 sheet drafts)
- Close draft window

- Press **Close** at the bottom of the page
- Click on **Home** in the upper left to go back to main menu