WebFM™ MANUAL

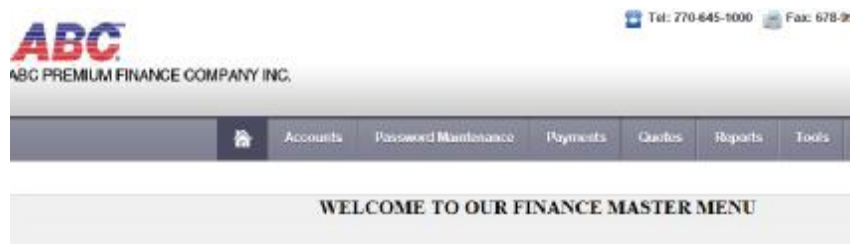**CONTENTS:**

INTRODUCTION

The address of your website is 'fmwebsite.com/fmxxx' where 'xxx' is the three letter abbreviation of your company name. Please ask your AIS support technician for the three letter abbreviation for your company.

Your site requires <u>Internet Explorer</u>. To browse to your site, simply type 'fmwebsite.com/fmxxx.asp in the address bar of Internet Explorer:

FINANCE COMPANY LOGIN

ⓘ Login Credentials

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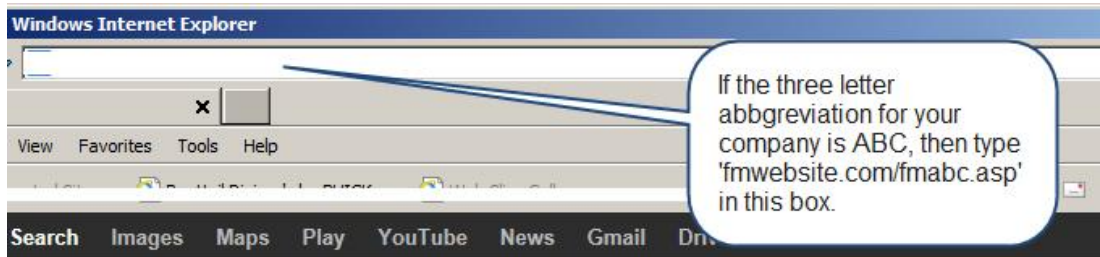
ID is '___' (see your AIS support technician);
Password is \WinFM\Finance Company Maintenance\Address/Phone\Web Password;
If no password then use _____.

Ø Accounts
- Inquiry by Account Code or DBA or Name or Policy Number;
  Click on specific account code in first column for more information and options;
  Post a Payment by check or credit card   .

Ø Password Maintenance
- Agent Passwords
- GA Passwords
- Insured Passwords
- Sales Rep Passwords

Ø Payments
- Download Web Payments:

The purpose of this option is to download web payments into your WinFM® system.
These instructions will detail how to download the payments and import them into
WinFM®.

a. Login to your website as Finance Company and click \Payments\Download Web Payments;
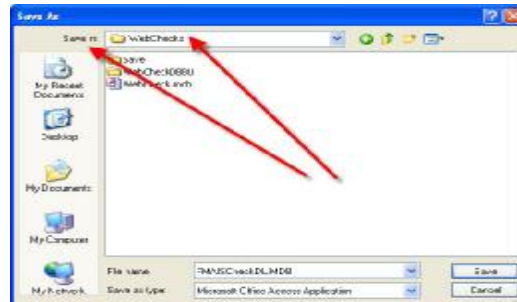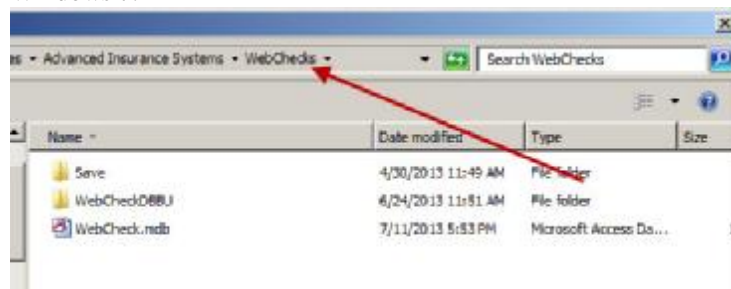b. Then click on Click Here to Download your Web Payment(s):

c. Choose to Save As:

d. Be certain you save the file in the correct folder:

XP:

Windows 7:

- Redownload Web Payments:
  This option is used in the event your need to repeat your most recent download. If, for example, the download file is lost for any reason, use Redownload to download it again.

- Reset Web Payment(s) for Download:
  In the event you need to re-download one or more payments, click 'Reset Web Payment(s) for Download:

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RESET PAYMENTS FOR DOWNLOAD

- Delete Web Payments:
  Use this often to avoid storage of sensitive information. Payments over 60 days old are subject to deletion.

- Delete Sensitive Info

Ø   Quotes
- Create a Quote
- Copy Existing Quoting Parameter
- Delete a Quote
- Delete Quotes by Range of Dates
- Download Web Quotes
 This option downloads all quotes that have not yet been downloaded.

  NOTE: The WebQuote folder resides within the FinanceMaster folder:
  \FinanceMaster\WebQuotes and within the \WebQuote folder there should be:
  Filecopy.avi
  FMWebQuoteLoad.exe
  FMWebQuotedontbackup.dat
  FMWebQuoteAutoProc.exe
  FMWebQuoteDB.dat
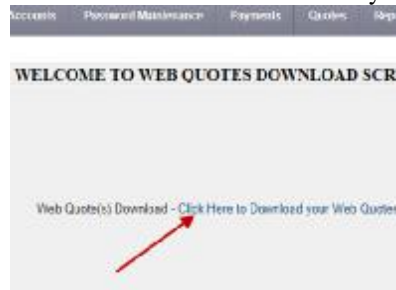   The contents of FMWebQuoteDB.dat should be four lines:

      FMabcQuoteDL.mdb (where abc are the three initials of your company)
      quote
      https://www.fmweb2.com/fmabc/fmwebquoteautoproc.asp
      SQL

a. Login to your website as Finance Company and click \Payments\Download Web Quotes:
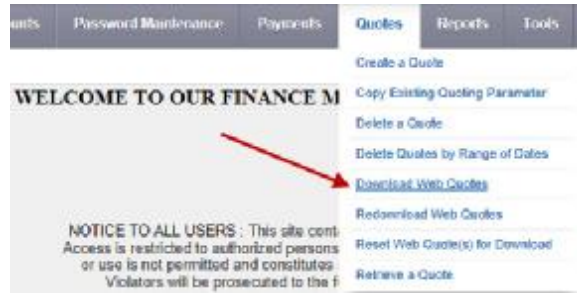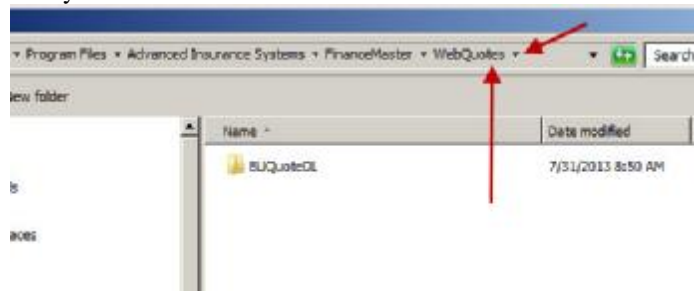
b. Then click on Click Here to Download your Web Quote(s):

c. The Download message should display:

Windows 7:

d. Be certain you save the file in the correct folder:

ℹ️ Note: If you receive a message "File Already Exists" it means you did not perform the following step e when you last downloaded quotes. Respond to this message by clicking Cancel. Then proceed to step e. After step e is completed, choose to Redownload Quotes and proceed to step c.
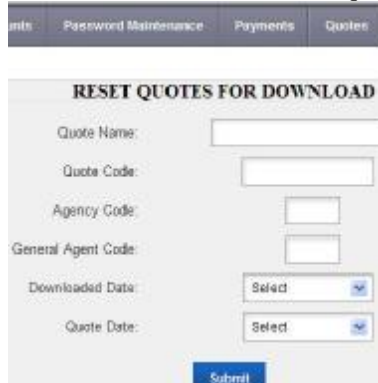
e. After saving the file, return to your desktop and double click on the FMWebQuoteLoad icon:

FMWebQuoteL oad.exe

f. The program will import the downloaded quotes into WinFM and display:
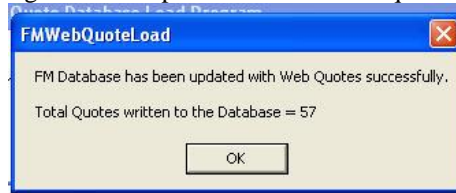
- Redownload Web Quotes:
  This option is used in the event your need to repeat your most recent download. If, for example, the download file is lost for any reason, use Redownload to download it again.

- Reset Web Quotes(s) for Download:
  If you need to re-download one or more quotes, click 'Reset Web Quote(s) for Download:

- Retrieve a Quote

Printing Issues:
  You may manually install the printing control from Meade and Company named ScriptX by browsing to www.financemaster.com/resources and click ScriptX Install Utility or browse to FinanceMaster.com then click Support then click Resources on the bottom right then click ScriptX Install Utility.

INTERNET EXPLORER INFO FOR PRINTING FINANCE AGREEMENT

1. After selecting FINANCE AGREEMENT from the Print Forms Menu, click on the arrow to the right of the printer icon and click Page Setup:

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2. Lastly, review the settings to match the following and click OK to save:

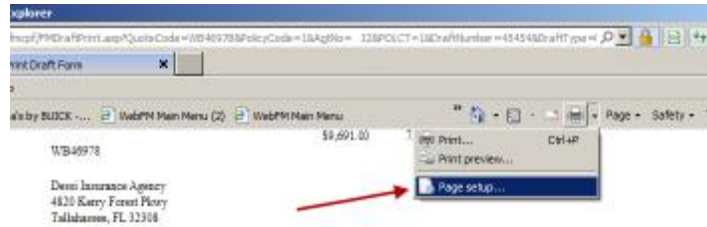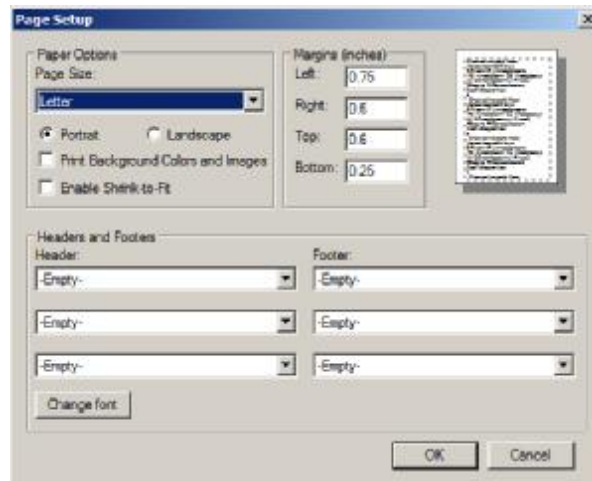**INTERNET EXPLORER INFO FOR PRINTING DRAFT**

1. After selecting DRAFT from the Print Forms Menu, click on the arrow to the right of the printer icon:

2. Next, click PAGE SETUP:

3. Lastly, review the settings to match the following and click OK to save:

Ø Reports
- Agency Logon Report
- Cancellations
- New Business
- Payments
- Quotes:
  Click Excel to download:

Ø Tools
- Add General Agent
- Add Insurance Company
- Add Change Agent
- Edit Welcome Text:
  This is the text that displays on the Agent Menu

INTERNET EXPLORER 10 SETTINGS:

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