

IZZY's Web Address: www.omniagents.com

Quoting New Business

1. Click **Quote/App** on the main menu.
2. Enter the **Zip Code** of the insured and click **Quote**.
3. Complete the quote and click **Rate** (located at the top or bottom of the screen).
4. Click **View Pay Schedule** and then **Print** on the main menu.
5. To write the application, click **Application** at the top of the screen. If you choose not to write the application at this time, enter an insured name to automatically save the quote.
6. Fill in the required fields which are denoted with asterisks (*).
7. If you haven't already done so, enter the vehicle information on the Basic screen by clicking **Lookup**. Enter the VIN on the right side of the screen and click **Go**.
8. Click **Continue** (located at the bottom of the screen).
9. Verify coverages, click **Rate** and **Continue** at the bottom of the screen. Review the information on the App Info page and click **Continue** at the bottom of the screen.
10. Enter the down payment information on the Deposit/Submit page and click **Submit** to upload the policy.
11. Click **Print** to print a copy of the application.

Payments

1. Enter the policy number on the homepage and click **Lookup Policy**.
2. Click on the **Cash/Check Payment** or the **Credit Card Payment** button.
3. Enter the payment information including the amount received and click **Post Payment**.
4. Click **Print Receipt** for insured and/or agent records.
5. Click Print and then **Close**.

Endorsements

1. Enter the policy number on the homepage and click **Lookup Policy**.
2. Click **Endorse Policy** (located at the top of the screen).
3. Enter the Endorsement Date and click **Process Endorsement**.
4. Make changes to the policy, click **Rating Info** then **Rate**. Click **Evaluate Endorsement Impact** on the right side of the screen. The current and revised pay schedules will be visible. If you want an endorsement quote only, exit and delete the endorsement. If you want to execute the change, click **Deposit/Submit** to process.
5. Enter all requested information in the Endorsement Information field. *Be very specific when populating the Description of Endorsement field. The description keyed will appear on the declarations page.* You have an option to enter a payment. Click **Submit**.
6. Please retain proof of the change request with insured signature for your files.