

AC Premium Financial PFA Documentation

Contents

Introduction	2
Login Screen	3
PFA Information Screen	4
Button Action Section	5
Display and Output Control Section.....	5
Search Section.....	5
PFA Detail Section	6
PFA Maintenance Screen	7
PFA Information Section	8
Policy Information Section.....	9
Quote Status Information Section	11

AC Premium Financial PFA Documentation

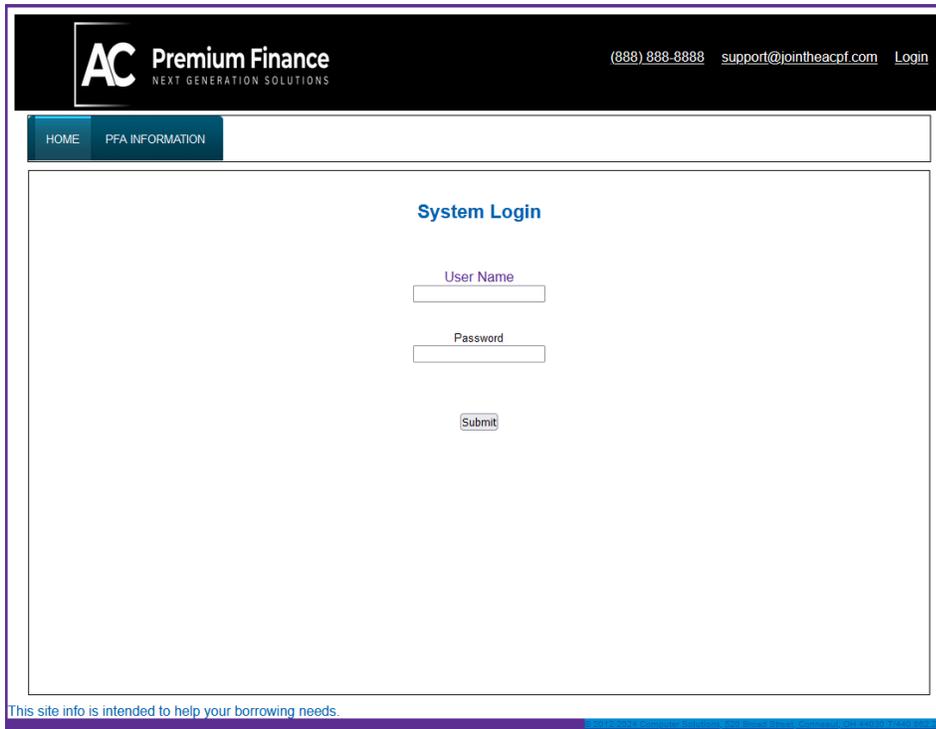
Introduction

This user documentation is intended to help an ACPF (Agency Collective Premium Finance) member create and track their PFAs (Premium Finance Agreements). It, like the system itself, is a work in progress.

AC Premium Financial PFA Documentation

Login Screen

You enter the system by logging in through the login screen.



The screenshot shows the AC Premium Finance login interface. At the top, there is a black header with the AC Premium Finance logo and tagline 'NEXT GENERATION SOLUTIONS' on the left, and contact information '(888) 888-8888 support@jointheacpf.com Login' on the right. Below the header is a navigation bar with 'HOME' and 'PFA INFORMATION' buttons. The main content area is titled 'System Login' and contains three input fields: 'User Name', 'Password', and a 'Submit' button. At the bottom of the page, there is a blue footer with the text 'This site info is intended to help your borrowing needs.'

You will be prompted with the login screen on both your initial sign-on as well as whenever you have gone too long without activity and the session time expires.

You will have received a username and password from support which you will use to log into the system.

After entering your **Username** and **Password** hit the **Submit** button. This will take you directly to the **PFA Information** screen.

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PFA Information Screen

This is the central screen where you can view all of the PFAs that have been entered by your agency.

The screenshot shows the 'PFA Information' screen. At the top, there are navigation tabs for 'HOME' and 'PFA INFORMATION'. Below the title 'PFA Information', there are two buttons: 'Refresh' and 'Add New PFA'. A row of icons for search, print, and export is visible. The search section includes a search bar and dropdown menus for 'Lender', 'Insured', 'Broker', 'GA', and 'Company', all set to '-- any --'. A 'Search type' dropdown is set to 'and'. Below the search section is a table with columns: 'Go to PFA', 'Qte ID', 'Proc ID', 'Lender', 'Agent', 'Insured', 'Broker', 'Eff Date', 'GA', and 'Delete'. The table contains 11 rows of data. At the bottom, it shows 'Results: 1 - 11 of 11', 'Pages: |<<< 1 >>>|', and 'Page size: 50'.

Go to PFA	Qte ID	Proc ID	Lender	Agent	Insured	Broker	Eff Date	GA	Delete
	43	0	1914	Capital	Nihill Insurance Services	Nihill Ins 2	2024-01-29		
	42	1668	1909	Capital	Nihill Insurance Services	Nihill Ins 2	2024-01-29		
	41	1667	1907	Capital	Nihill Insurance Services	Nihill Ins 2	2024-01-29		
	39	1665	1902	Capital	Nihill Insurance Services	Nihill Ins 2	2024-01-29		
	37	1664	1900	Capital	Nihill Insurance Services	Nihill Ins 2	2024-01-29		
	34	1663	1898	Capital	Nihill Insurance Services	Nihill Ins 2	2024-01-29		
	27	1661	1888	Capital	Nihill Insurance Services	Billy Bob - Nihill	2024-01-29		
	21	25388435		IPFS	Nihill Insurance Services	Nihill Ins 2	2024-01-28		
	20	0	1882	Capital	Nihill Insurance Services	Billy Bob - Nihill	2024-01-27		
	17	1638	1839	Capital	Nihill Insurance Services	Nihill Ins 2	2024-01-26		
	16	1677	1930	Capital	Nihill Insurance Services	Nihill Ins 2	2024-01-16		

This site info is intended to help your borrowing needs.

The screen is made up of four sections.

- 1) **Button Action** Section. This is made up of two buttons:
 - a. **Refresh** – This button refreshes the screen to a current state.
 - b. **Add New PFA** – This button allows you to add a new PFA for your agency.
- 2) **Display and Output Control** Section. This section (The row of icons) is represents:
 - a. The **Magnifying Glass** enables you to turn on and off the display of search section.
 - b. The **Output Icons** allowing you to output, in various formats, the information displayed in the **PFA Detail** section.
- 3) **Search** Section. This section provides each of the search options available which, when selected, filter the PFA items displayed in the **PFA Detail** section.
- 4) **PFA Detail** Section. This section displays all of the PFA items available based on your search values.

Each of these sections will be described in great detail below.

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Button Action Section

PFA Information

Refresh

Add New PFA

This is made up of two buttons:

- 1) **Refresh** – This button refreshes the screen to a current state.
- 2) **Add New PFA** – This button allows you to add a new PFA for your agency.

Display and Output Control Section



This section (The row of icons) is represents:

- 1) The **Magnifying Glass** enables you to turn on and off the display of search section.
- 2) The **Output Icons** allowing you to output, in various formats, the information displayed in the **PFA Detail** section.

Search Section

Search

Qte ID	<input type="text"/>
Lender	-- any -- ▾
Insured	-- any -- ▾
Broker	-- any -- ▾
GA	-- any -- ▾
Company	-- any -- ▾
Search type:	and ▾ <input type="button" value="Search"/>

This section provides each of the search options available which, when selected, filter the PFA items displayed in the **PFA Detail** section.

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PFA Detail Section

Go to PFA	Qte ID	Proc ID	Lender	Agent	Insured	Broker	Eff Date	GA	Delete
43	0	1914	Capital	Nihill Insurance Services	Nihill Ins 2		2024-01-29		
42	1668	1909	Capital	Nihill Insurance Services	Nihill Ins 2		2024-01-29		
41	1667	1907	Capital	Nihill Insurance Services	Nihill Ins 2		2024-01-29		
39	1665	1902	Capital	Nihill Insurance Services	Nihill Ins 2		2024-01-29		
37	1664	1900	Capital	Nihill Insurance Services	Nihill Ins 2		2024-01-29		
34	1663	1898	Capital	Nihill Insurance Services	Nihill Ins 2		2024-01-29		
27	1661	1888	Capital	Nihill Insurance Services	Billy Bob - Nihill		2024-01-29		
21	25388435		IPFS	Nihill Insurance Services	Nihill Ins 2		2024-01-28		
20	0	1882	Capital	Nihill Insurance Services	Billy Bob - Nihill		2024-01-27		
17	1638	1839	Capital	Nihill Insurance Services	Nihill Ins 2		2024-01-26		
16	1677	1930	Capital	Nihill Insurance Services	Nihill Ins 2		2024-01-16		

Results: 1 - 11 of 11

Pages: << << **1** >> >>|

Page size: 50

This section displays all of the PFA items available based on your search values.

AC Premium Financial PFA Documentation

PFA Maintenance Screen

The PFA Maintenance section screen is where all of the valid information to generate a PFA is added and maintained.

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Site Documentation (844) 500-2757 support@jointheacpf.com Login

HOME PFA INFORMATION

PFA ID #117

PFA Information General Liability Quote Results

PFA Assignments Tab

Next

Agent Mikayla Agency
Insured List Mikayla Johnston [Add New Insured](#)
Effective Date 02 / 13 / 2024
Expiration Date 02 / 13 / 2025
Down Payment % 25
Cancel Days 10 Days

Choose Lender
CAPITAL PREMIUM FINANCING
PFS

Policy Term Option 12 Months
Billing Type Agency Bill
Loan Type Commercial
Down Payment Method ACH
Down Payment Paid By Agent
Policy Loss Payee Requested

Next

[Back to PFA Information Page](#)

There are 3 main sections to the PFA Maintenance Screen

- 1) **PFA Information** – This section includes all of the overall information needed to define the PFA and what lender is going to provide the quote.
- 2) **Policy Information** – This section made up of 1 to 5 tabs (1 for each policy included in this PFA) contains the specifics for this policy including things like Coverage Type, Premium amount and the fees for this policy. It also defines who what Insurance Company, General Agent and potential Broker are involved in this policy.
- 3) **Quote Status Information** – This section displays the summary of the returned quote from the lender including amounts as well as a link to the actual quote, in PDF format, which can be printed out and signed as needed.

More detailed descriptions of each of these sections follows.

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PFA Information Section



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HOME PFA INFORMATION

PFA ID #117

PFA Information General Liability Quote Results

PFA Assignments Tab

Next

Agent	Mikayla Agency
Insured List	Mikayla Johnston Add New Insured
Effective Date	02 / 13 / 2024
Expiration Date	02 / 13 / 2025
Down Payment %	25
Cancel Days	10 Days

Choose Lender

Policy Term Option	12 Months
Billing Type	Agency Bill
Loan Type	Commercial
Down Payment Method	ACH
Down Payment Paid By	Agent
Policy Loss Payee Requested	<input type="checkbox"/>

Next

[Back to PFA Information Page](#)

This section includes all of the overall information needed to define the PFA and what lender is going to provide the quote.

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Policy Information Section

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HOME PFA INFORMATION

PFA ID #117

PFA Information General Liability Quote Results

Policy 1 Tab

Prev Add Another Policy

Coverage Type	General Liability
Company	(LAMMICO) Louisiana Medical Mutual
General Agency	1230CP
Broker	No Broker Add Broker
Policy Number	Pending

Pure Policy Premium	10000
Policy Fee	750
Tax/Stamp Fee	35
Broker Fee	18
Inspection Fee	0
Total Policy Premium	10803
Policy Down Payment Amount	3303

Prev Add Another Policy

Submit PFA

[Back to PFA Information Page](#)

AC Premium Finance Computer Solutions, 300 Broad Street, Columbus, GA 31901, Phone: 800-800-4077

This section made up of 1 to 5 tabs (1 for each policy included in this PFA) contains the specifics for this policy including things like Coverage Type, Premium amount and the fees for this policy. It also defines who what Insurance Company, General Agent and potential Broker are involved in this policy.

Some of the functionality and limitations to the fields are as follows:

- 1) Coverage Type
 - a. Using a Coverage Type of “No Coverage” means that policy Tab is inactive and no premium or fees can apply.
- 2) Pure Policy Premium
 - a. There are acceptable ranges to the premium. Anything entered outside of those ranges will automatically be reset to a value within that range.
 - b. Currently, the minimum value is 1 and the maximum value is 100,000.
- 3) Policy Fees

AC Premium Financial PFA Documentation

- a. There are acceptable ranges to each of the defined policy feeds. Anything entered outside of those ranges will automatically be reset to a value within that range.
- b. Currently, the minimum value is 0 and the maximum value is 50,000.

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Quote Status Information Section



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[HOME](#) [PFA INFORMATION](#)

PFA ID #117

PFA Information General Liability **Quote Results**

Quote Tab

[Prev](#)

Process ID	<input type="text" value="6533922"/>
Financed Amount	<input type="text" value="0"/>
Down Payment Amount	<input type="text" value="0"/>
Finance Charge	<input type="text" value="0.00"/>
Payment Amount	<input type="text" value="0.00"/>
Interest Rate	<input type="text" value="0"/>



simplyeasier
PAYMENTS [Click here to go directly to Simply Pay](#)

Quote ID

[Prev](#)

[Back to PFA Information Page](#)

This section displays the summary of the returned quote from the lender including amounts as well as a link to the actual quote, in PDF format, which can be printed out and signed as needed.