

SETTING UP AGREEMENTS ON WEBFM

- Log onto <https://www.fmweb1.com/FMGRI/FMGRI.asp>
- Go to left of the screen and click on “Agent”
- Log in using your Graham-Rogers code as the “Agent Code” and the Password is your 10 digit agency phone number
- On the menu on the left of the page click on Quotes
- Click on Create a Quote
- Rate plan is always Oklahoma
- Choose the correct company (if there is more than one just choose the first one)
- Enter the first policy number
- Enter Policy Amount including all taxes and fees, this will be for the first policy (you will be able to add more policies in a moment)
- MGA is always Graham-Rogers
- Assigned Risk will always default to NO
- Leave Policy Fee blank
- Choose correct policy coverage
- Auditable will always default to NO
- Leave Policy Tax blank
- Choose policy status (if you do not know enter new)
- Other will always default to NO
- Finance Fee will always default to NO
- Choose correct Policy Type
- Short-Rate will always default to NO
- Finance Tax will always default to NO
- Policy Term will always default to 12
- Minimum Earned will always default to NONE
- Leave SR22 blank
- Change the inception date in mm/dd/yyyy format
- Days to Cancel will always default to STANDARD

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- Hit "Save Quote"
- Quote screen will look like this

The screenshot shows a web browser window titled "Quote Summary - Windows Internet Explorer". The address bar shows the URL: <https://www.fmweb1.com/FMGRI/FMQuoteSummary.asp?AgtNo=96288>. The page content includes:

Federal Truth In Lending Disclosures

Total Contract	Down Payment	Doc Stamps	Amount Financed	Number of Payments	Setup Fee	Setup Fee	Interest	Total Finance Charge
\$3,703.00	\$925.75	\$0.00	\$2,777.25	9	\$0.00	\$0.00	\$236.58	\$236.58

Payment Schedule

Total of Payments	Annual % Rate	Payment Amount	First Due Date
\$3,013.83	20	\$334.87	10/5/2007

[Insured Info](#) [Print Forms](#) [Add Policy](#)

Policy Information

Insurance Company	Effective Date	Policy Total	Coverage Type
NORTHLAND INS CO TN567522	9/4/2007 12	\$3,703.00	TRANSPORTATION / Graham-Rogers, Inc

- *At this point you can add other policies by clicking on Add Policy and repeating the above steps*
- Once all policies are entered, you can continue with the quote
- Any of the items that are underlined can be changed based on the quote provided by the underwriter
- This quote has automatically defaulted to 25% down, to change to 30% down click on the down payment and enter the new amount down to \$1110.90

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Quote Summary - Windows Internet Explorer

https://www.fmweb1.com/FMGRI/FMQuoteSummary.asp?AgtNo=96288

Quote Summary

Federal Truth In Lending Disclosures

Total Contract	Down Payment	Doc Stamps	Amount Financed	Number of Payments	Setup Fee	Setup Fee	Interest	Total Finance Charge
\$3,703.00	\$1,110.90	\$0.00	\$2,592.10	9	\$0.00	\$0.00	\$220.76	\$220.76

Payment Schedule

Total of Payments	Annual % Rate	Payment Amount	First Due Date
\$2,812.86	20	\$312.54	10/5/2007

[Insured Info](#) [Print Forms](#) [Add Policy](#)

Policy Information

Insurance Company Policy Number	Effective Date Term	Policy Total	Coverage Type General Agency
NORTHLAND INS CO TN567322	9/4/2007 12	\$3,703.00	TRANSPORTATION / Graham-Rogers, Inc

Internet 100%

- To complete the agreement, click on “Insured Info”
- Fill in the DBA if necessary
- Fill in the address information
- We do not require phone numbers, fax number or e mail address
- Graham-Rogers offers only the coupon option, please mark it

Insured Maintenance - Windows Internet Explorer
https://www.fmweb1.com/FMGRI/FMQuoteNewInsured.asp?QuoteCod...
Insured Maintenance

Insured Quote Information

Please Enter the Following Insured Information

SS#: DL/FEI#: Invoice
*Insured Name: Coupon
DBA: Invoice & Coupon
Address One: ACH
Address Two: Post Dated Check
City: State: Zip: Zip4:
Home Phone: Work Phone: Fax:
E-Mail: Web Access Password:
Misc1:
Misc2:

*Indicates Required Information

- Click on Save Quote
- This will take you back to the Quote screen. Click on print forms
- Check the address information and then hit “Save”
- Click on Finance Agreement and print the agreement
- Have the insured initial and sign the agreement and fax or mail to Graham-Rogers Inc

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- **You may choose to print the temporary coupons, however, the financing is not complete until a signed agreement is received by Graham-Rogers Inc and the transaction is approved. Your insured will receive a copy of the coupons in the mail from Graham-Rogers Inc**
- You also have the option of printing a premium financing quote for your insured by clicking on "Quote Agreement".
- Close out the Agreement screen then you can click on Main Menu to enter another insured