



# BROKER BUILDER

YOUR STRATEGIC PROFIT PARTNER

1

- Go to [www.brokerbuilder.ca](http://www.brokerbuilder.ca) – Your user name is your full email – Your password is 123456 –
- Click on “Premium Finance Software” and log in.

2

- Go to **Quote** in the top menu – Click “New Quote”
- Click “Find Insured” and select or “Add Insured”.
- Click “Save” (top right)
- You should have a new Menu – Follow the Menu left to right

3

- Click on “Policies” in the new menu
- Click “Add policy” A new menu will appear
- Add Binder # / Policy Number # – amount and click “Save”
- Complete “Term, Insurer (Add Insurer)”, Complete Fee’s” tabs
- Click “Save & Close”

4

- Click left to right for information on the quotation
- Click the “Results” tab to view the quote
- Click the “Payment” tab – check “Continuous” & “Automatic withdrawal” – Complete info off of void cheque
- Click “SAVE” – Click “Status” tab – Complete any outstanding

5

- Click “Contract” tab and choose “view PDF” – Print Contract
- Have customer review and sign contract.
- Obtain Void Cheque & Down Payment
- Submit Contract to “insert local contact” for review and completion (file original contract centrally).
- That’s it!

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#### Information:

Contact or Questions –support@brokerbuilder.ca– Ben or (other internal contact).  
Detailed Instructions with Screen Prints Available in system.

**Steps 1-4 are the quoting process – Step 5 is binding the contract**