Welcome to Aspire's New Arizona Policy Point of Sale System



STEP 1- Enter the Aspire System



Sign in



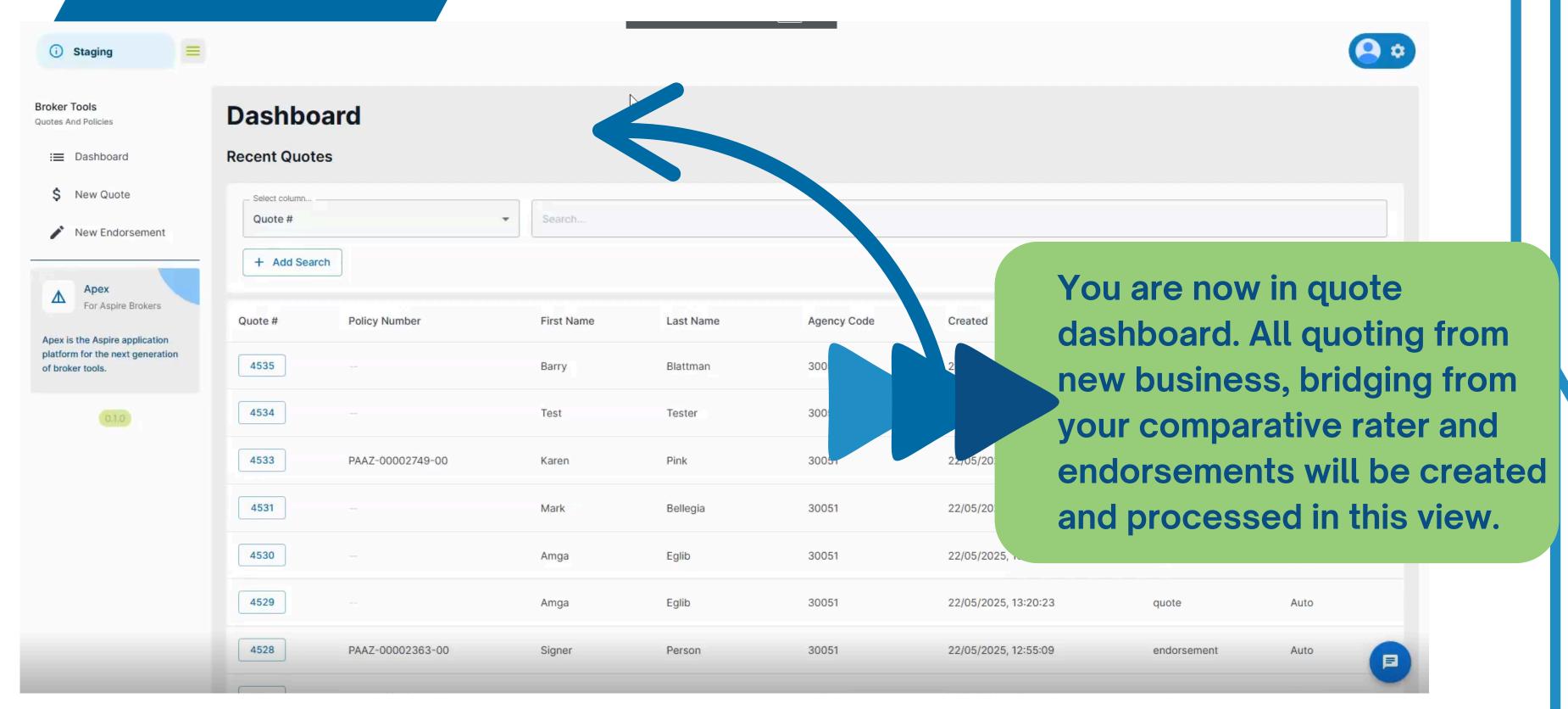
N.

Log in with your Aspire Arizona Credentials



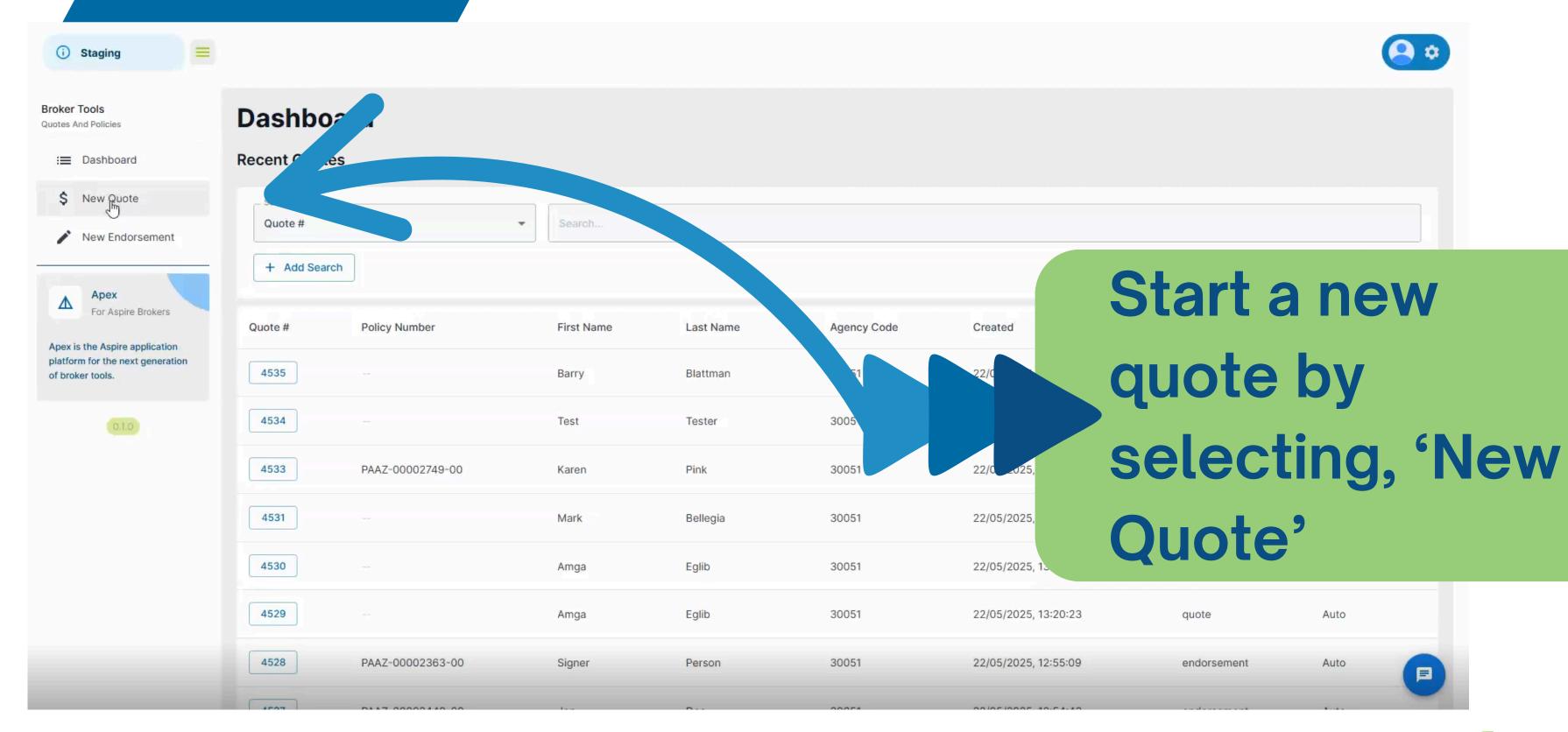


STEP 2- View the Quote Dashboard



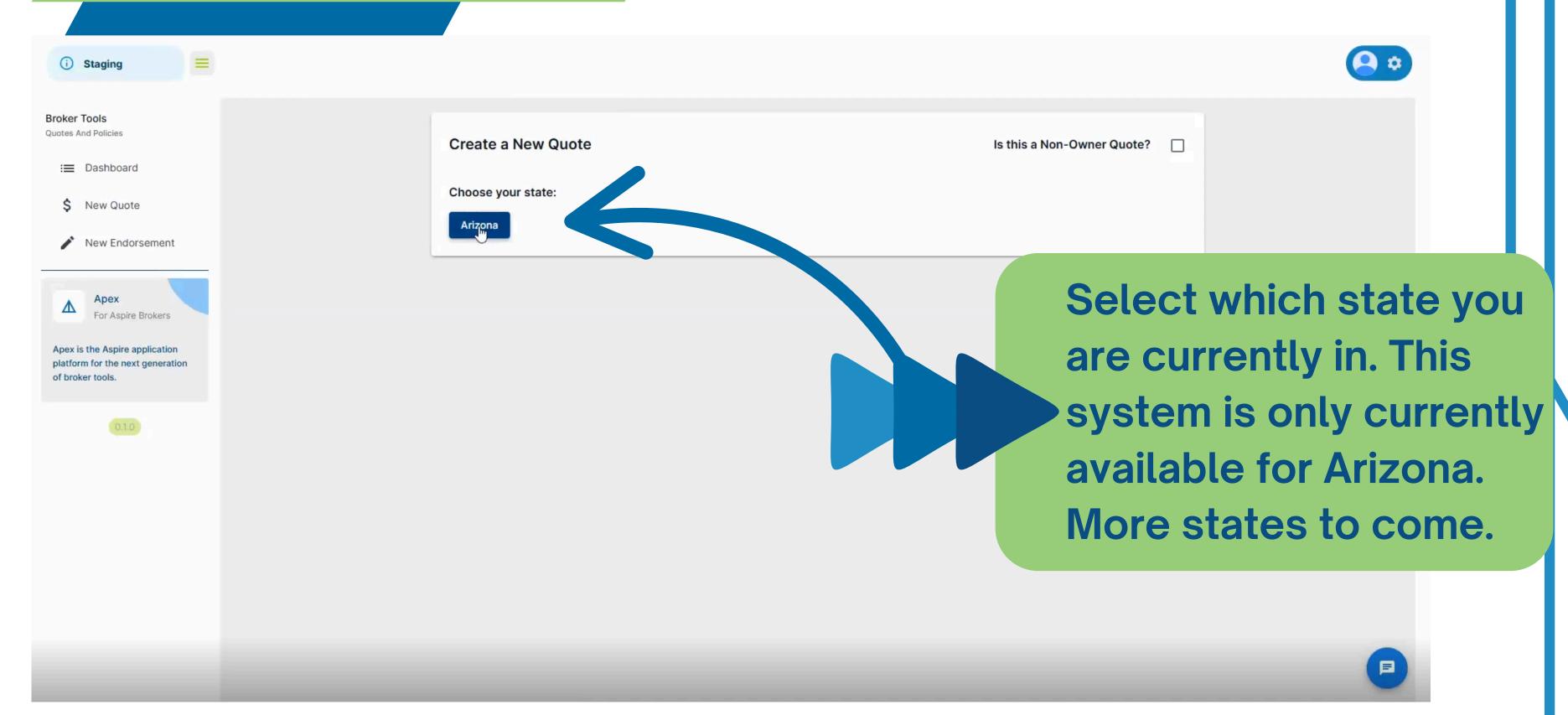


STEP 3- Start a quote



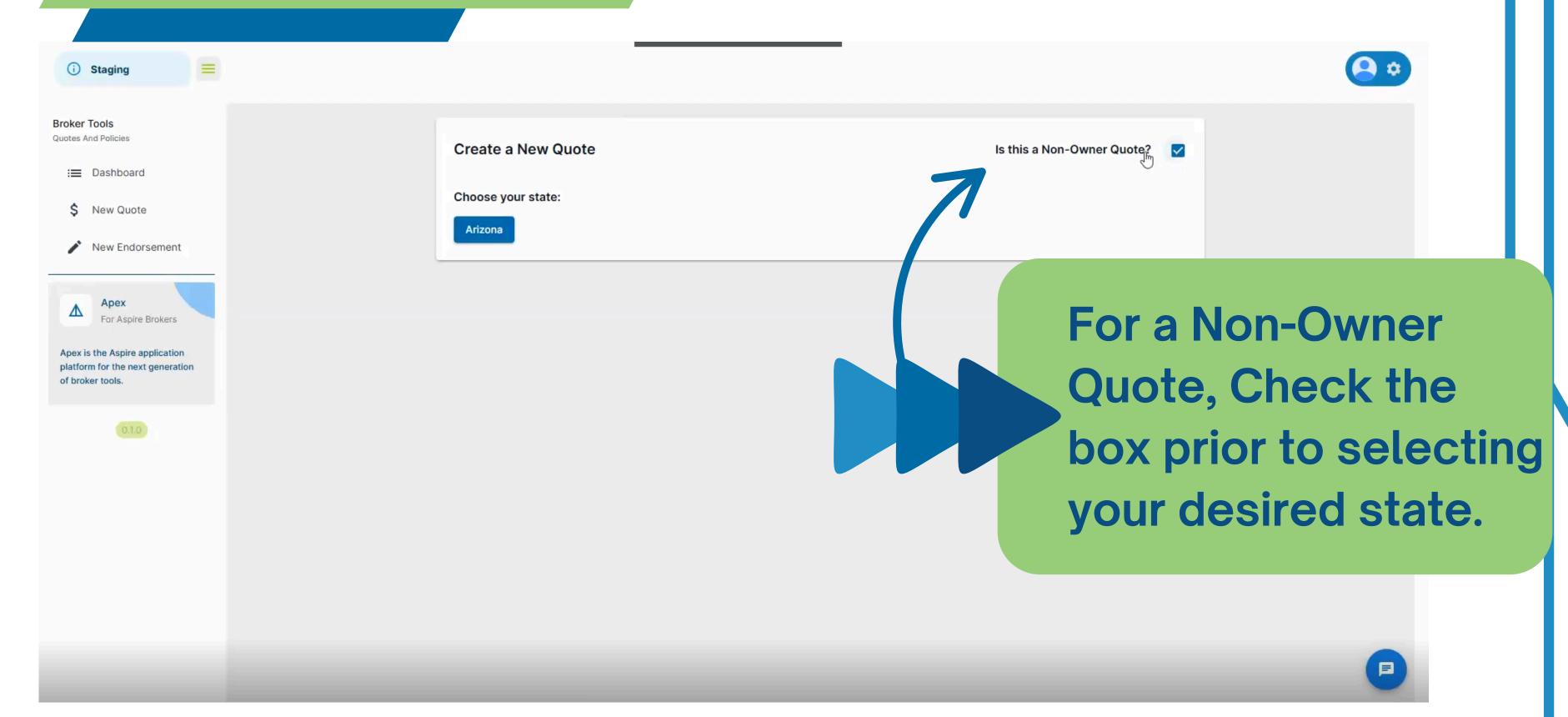


STEP 4- Select State



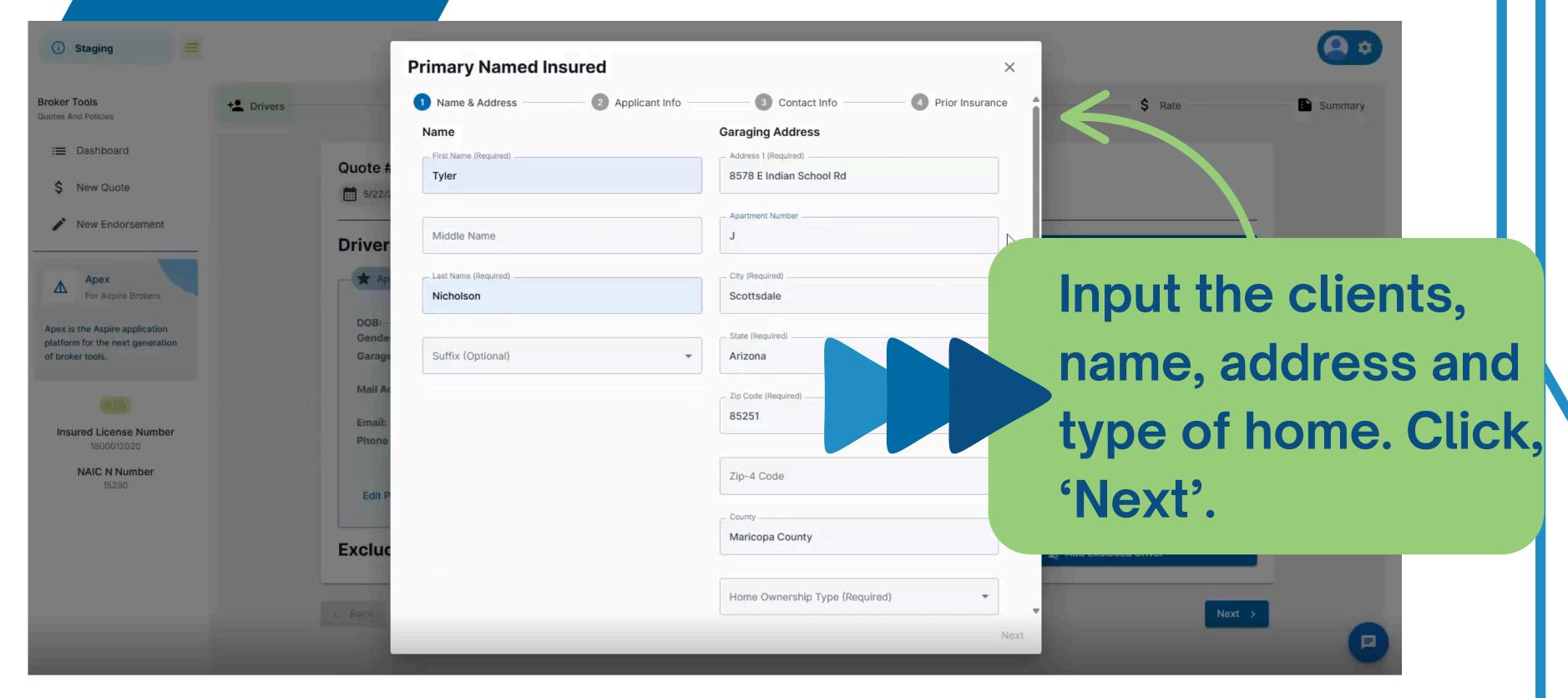


STEP 4 Continued-Select State

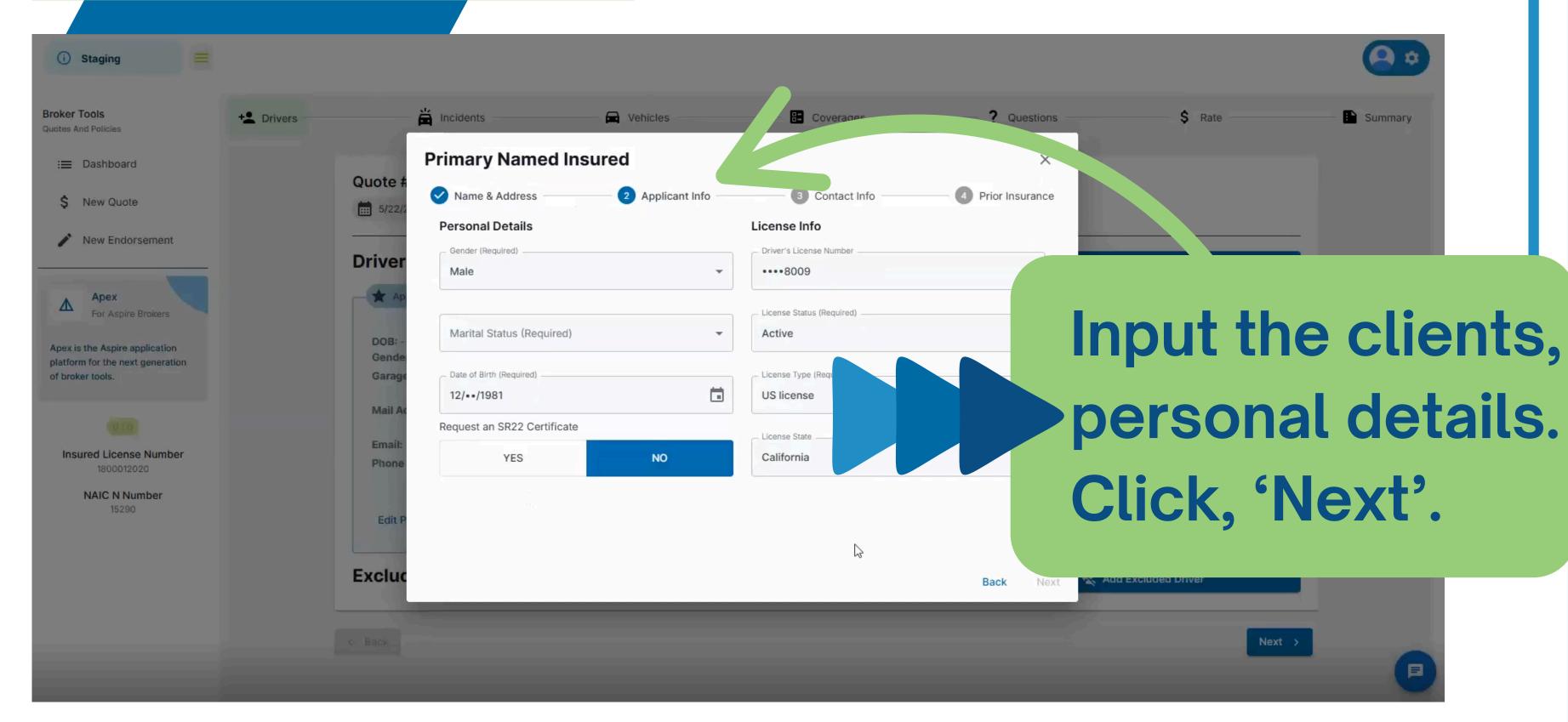




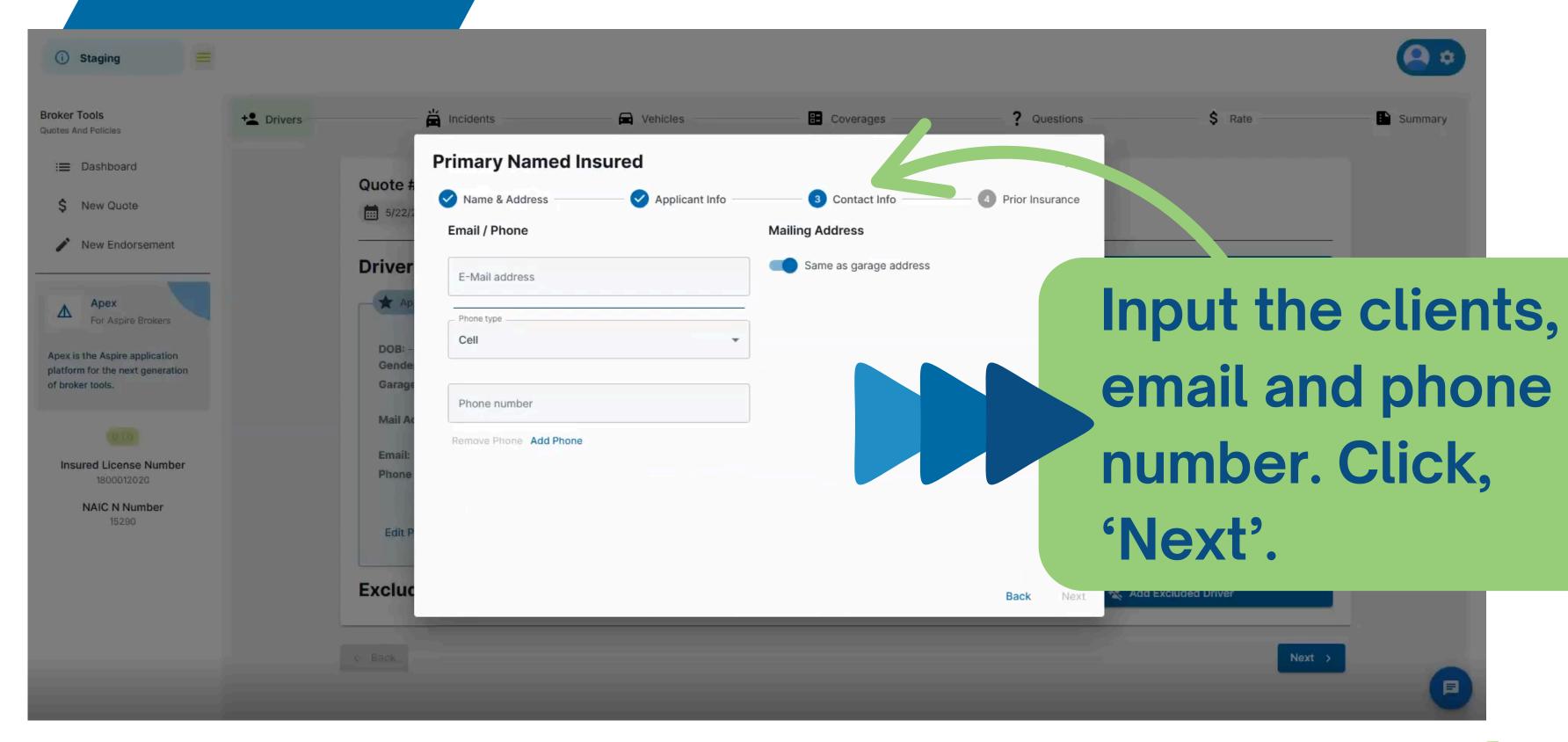
STEP 5- Input Clients Information



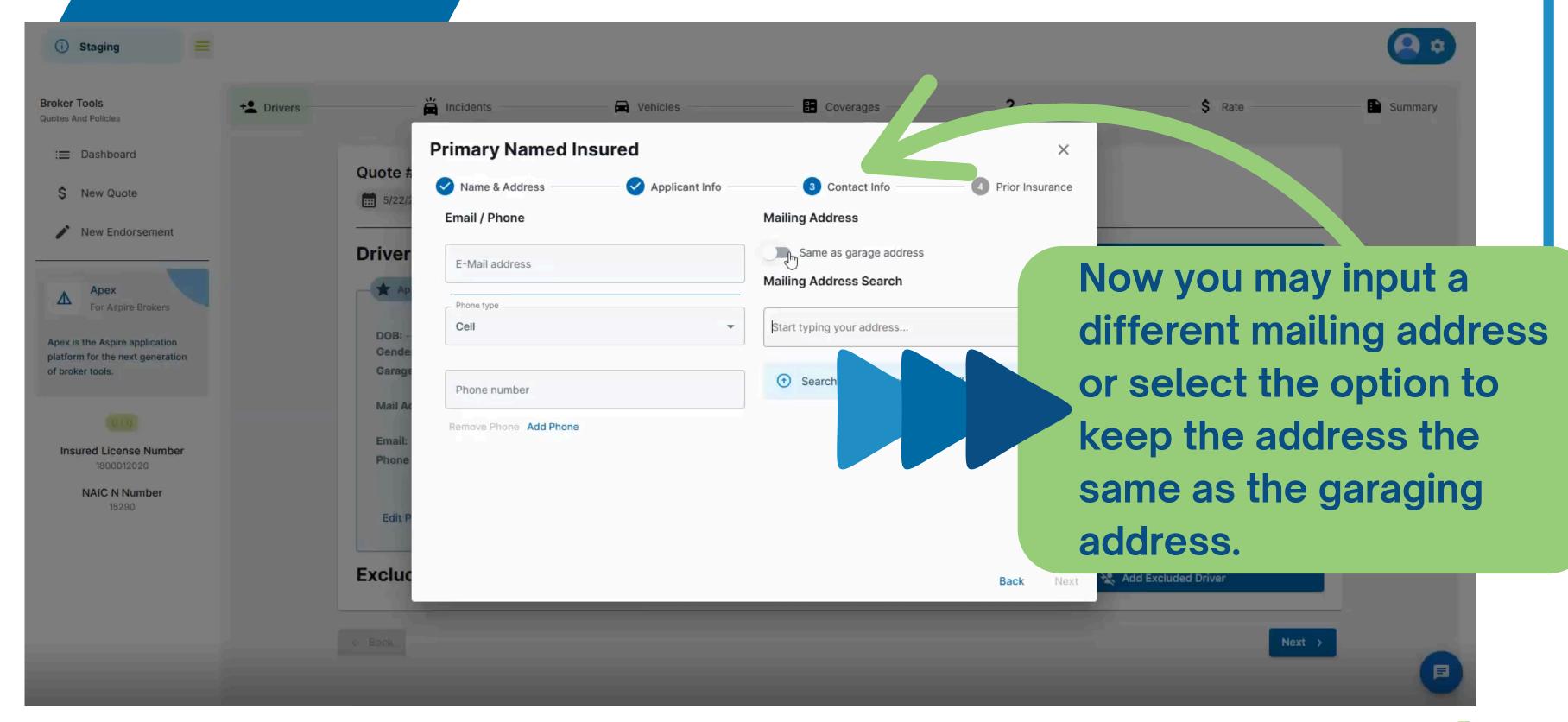




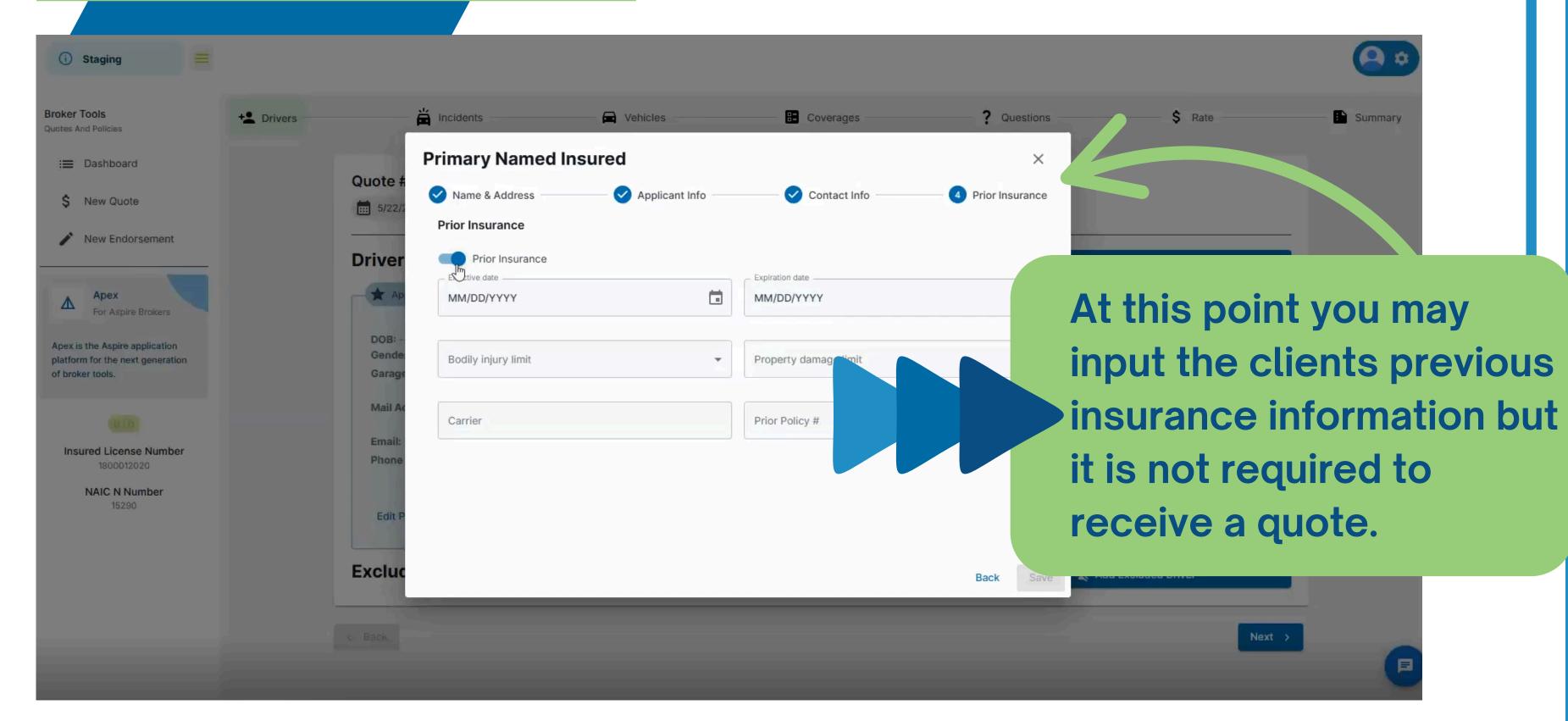






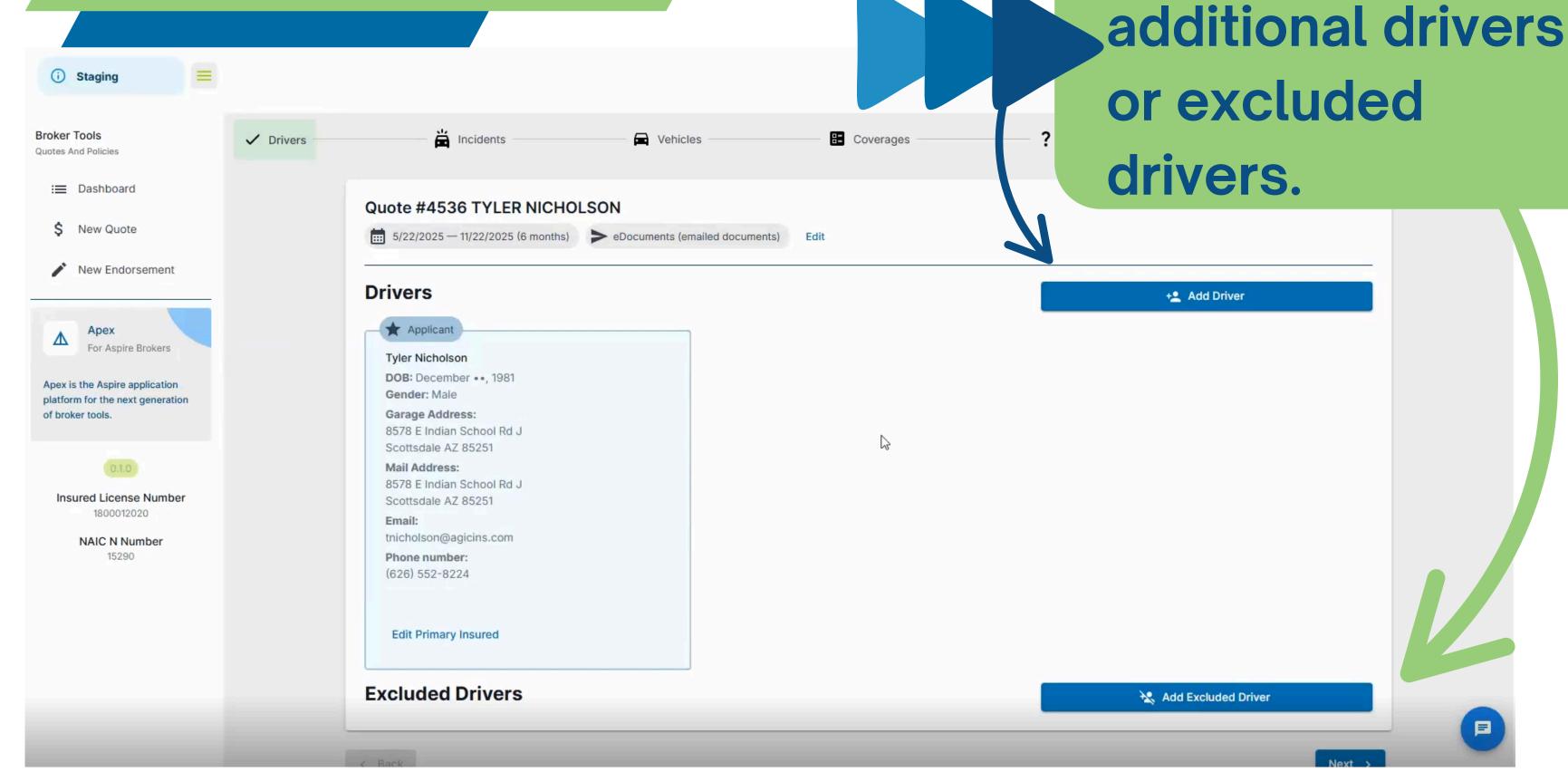








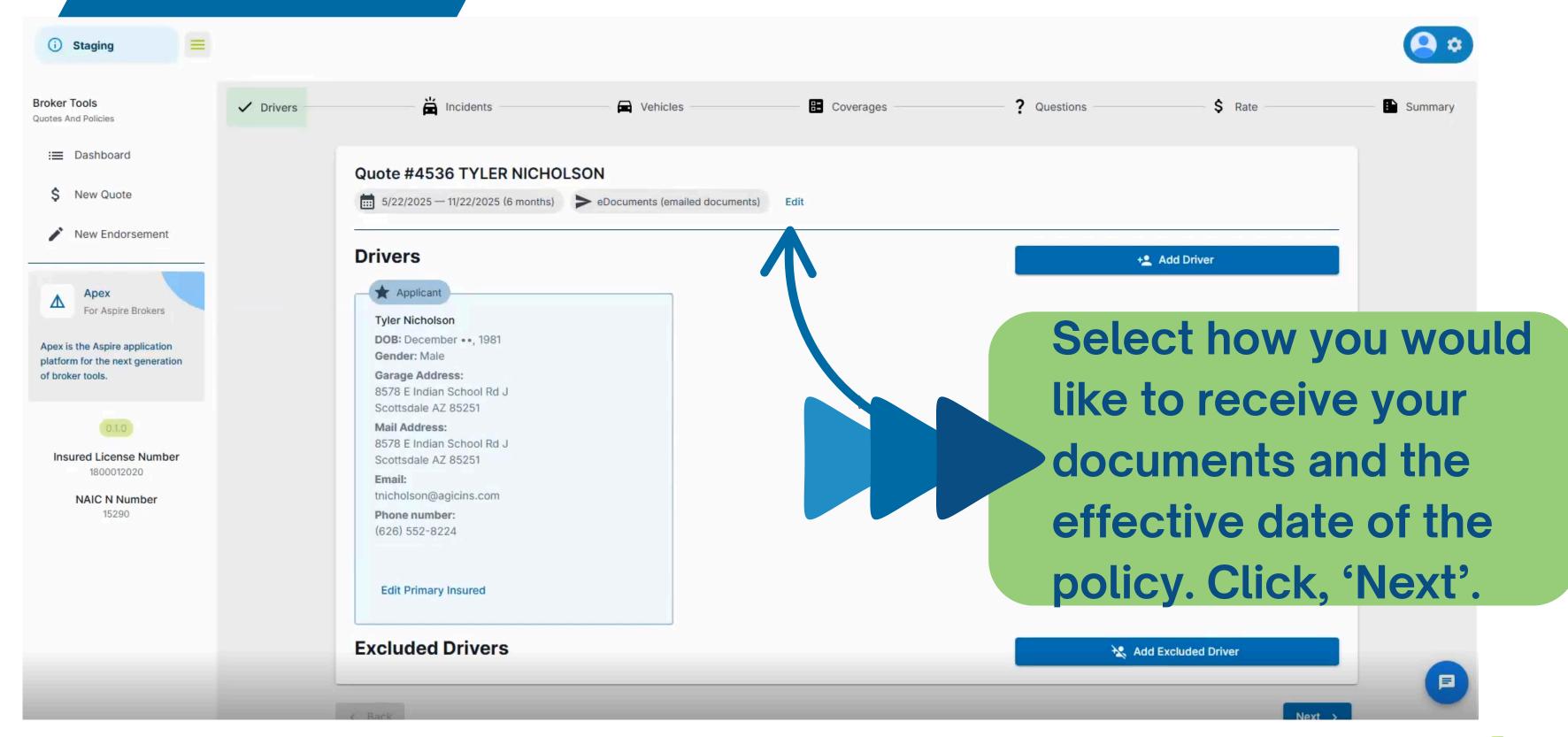
STEP 6- Add Additional Drivers and Excluded Drivers





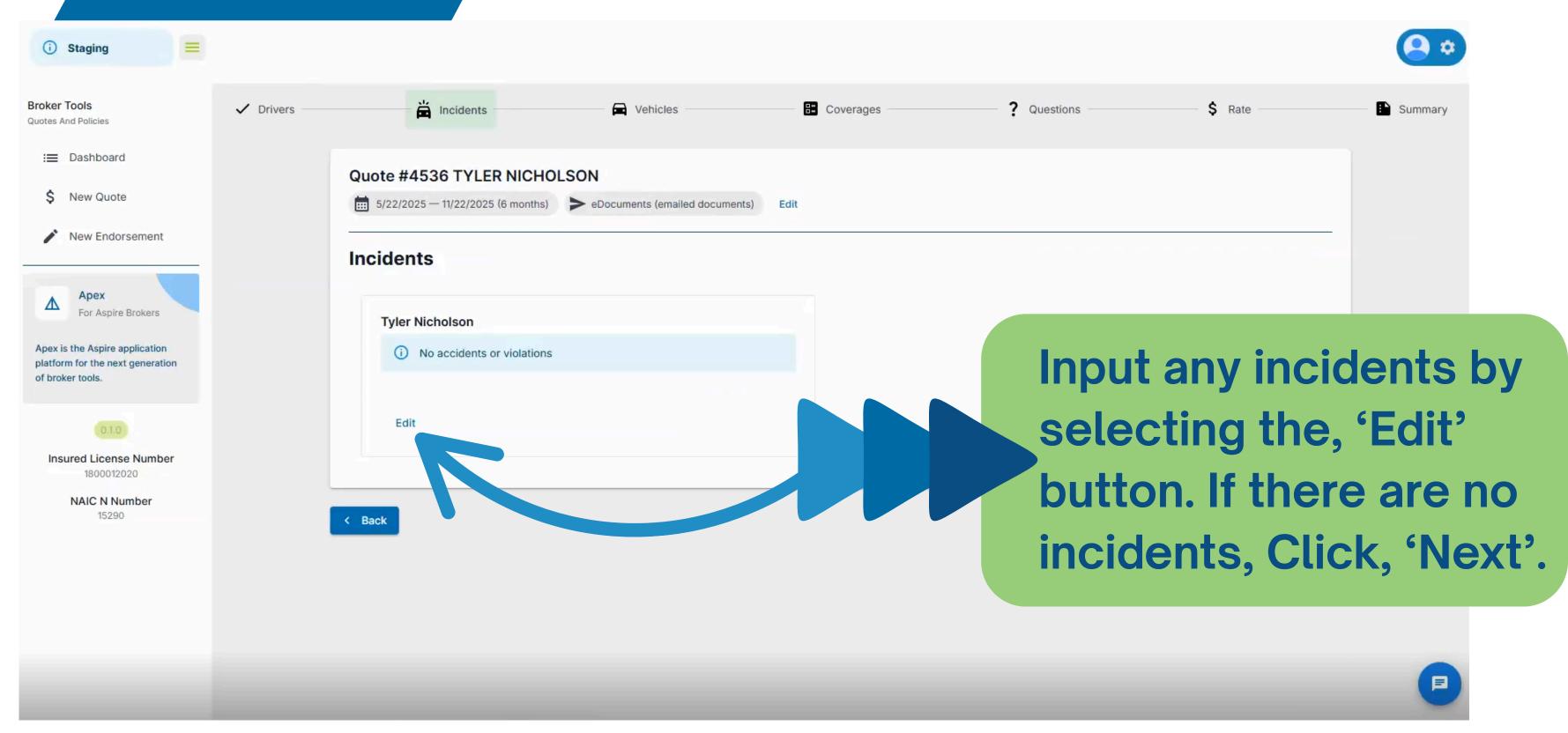
Now, you may add

STEP 7- Select How to Receive Documents



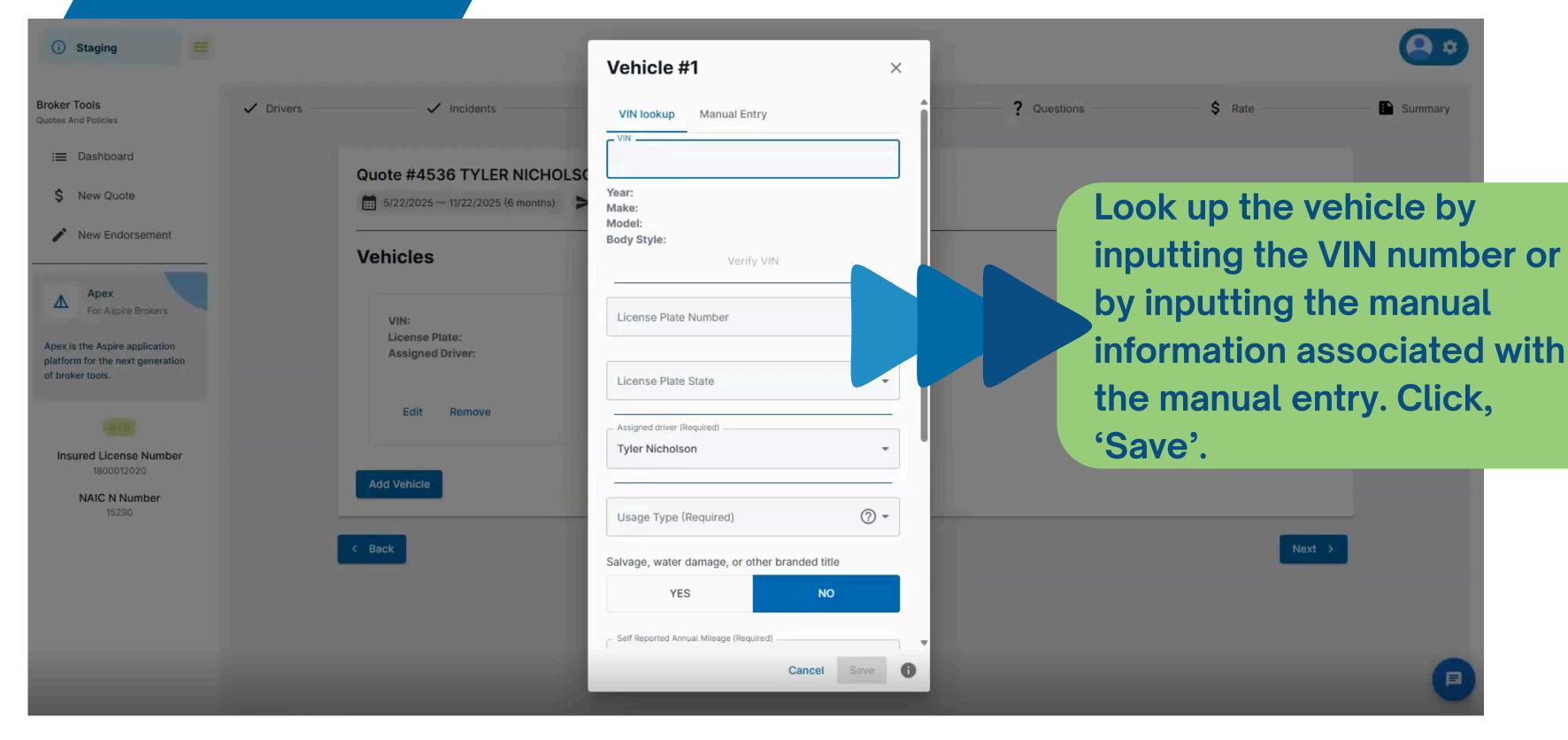


STEP 8- Input Incidents



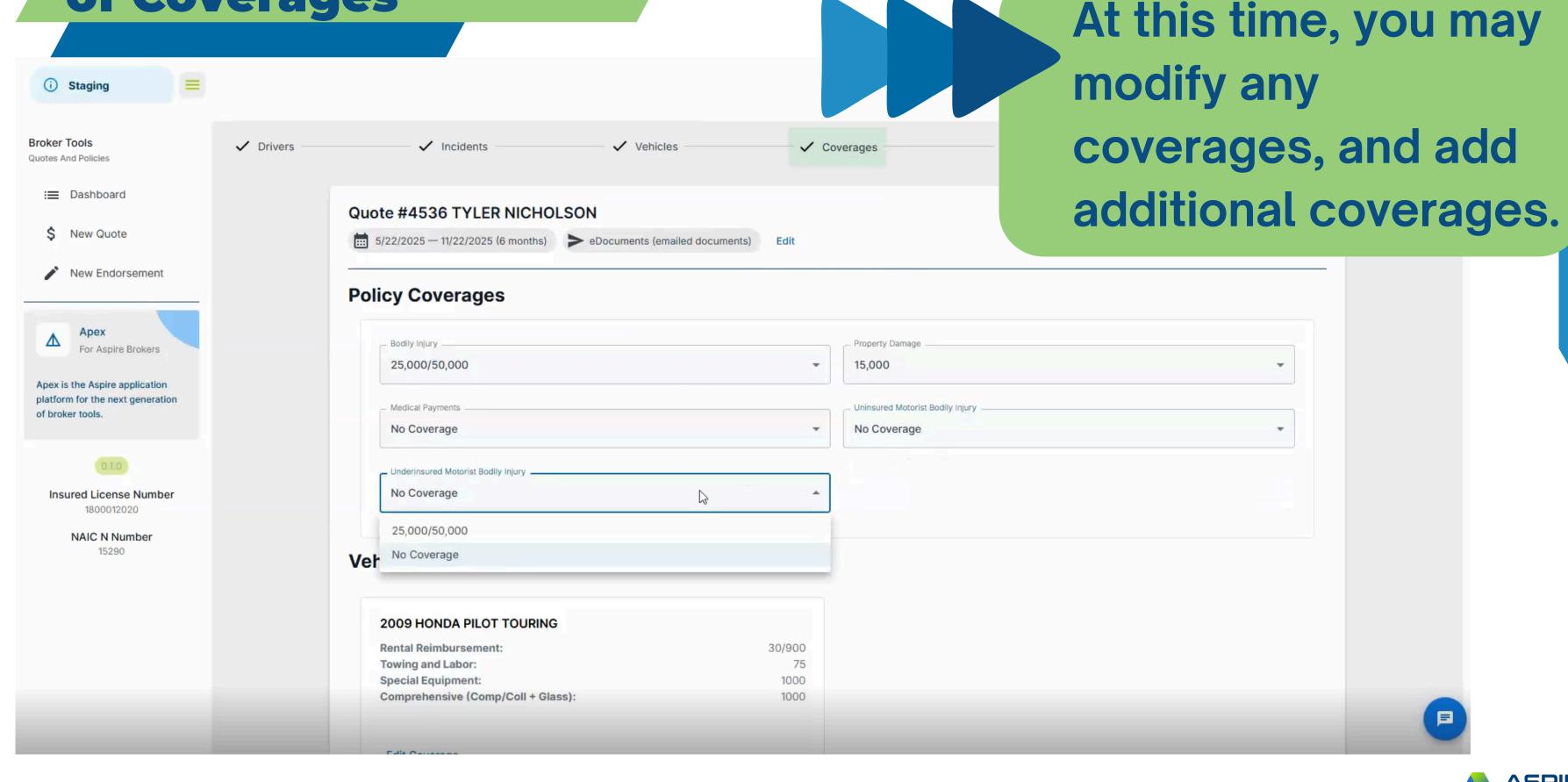


STEP 9- Vehicle Lookup



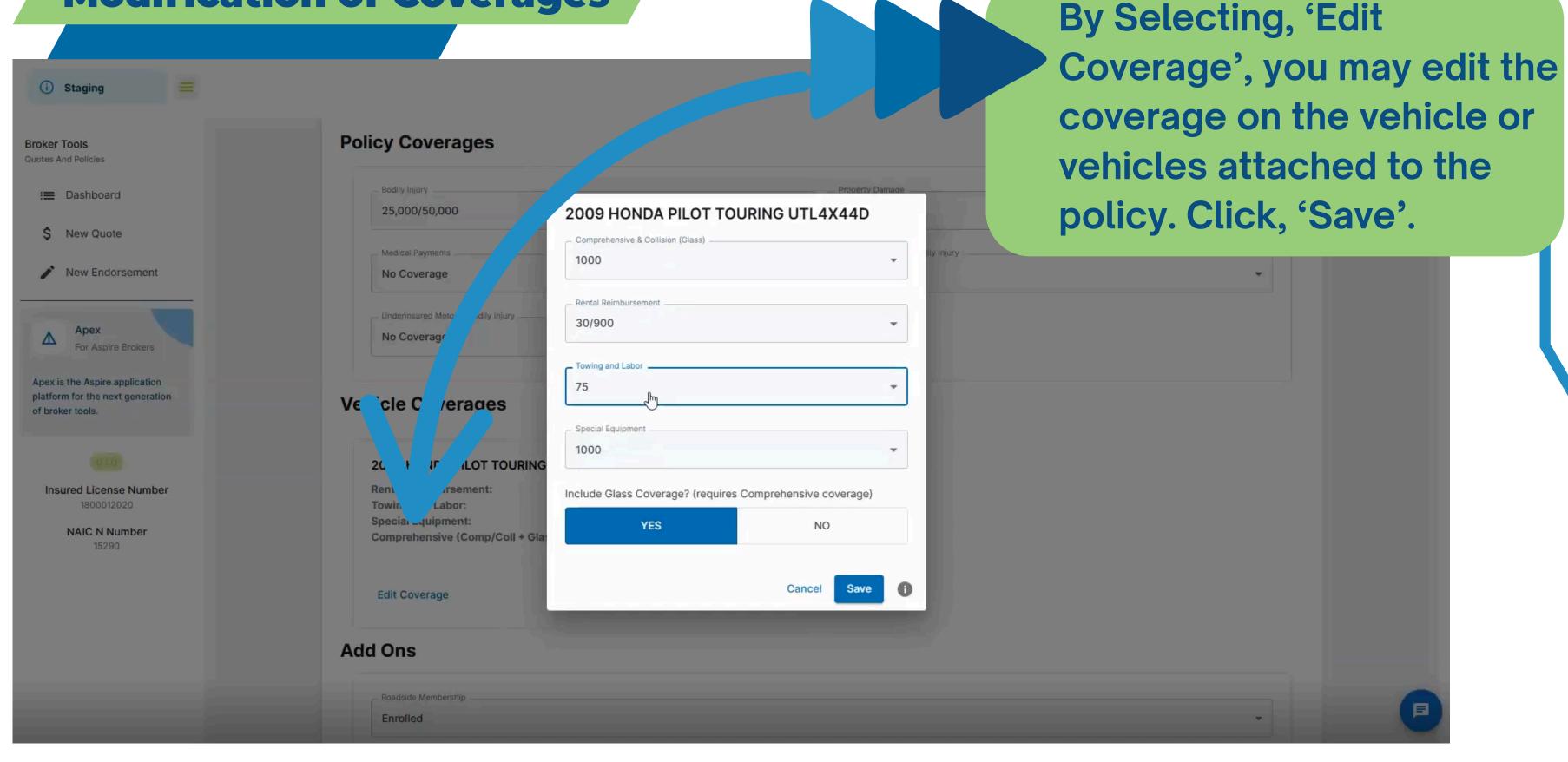


STEP 10- Modification of Coverages



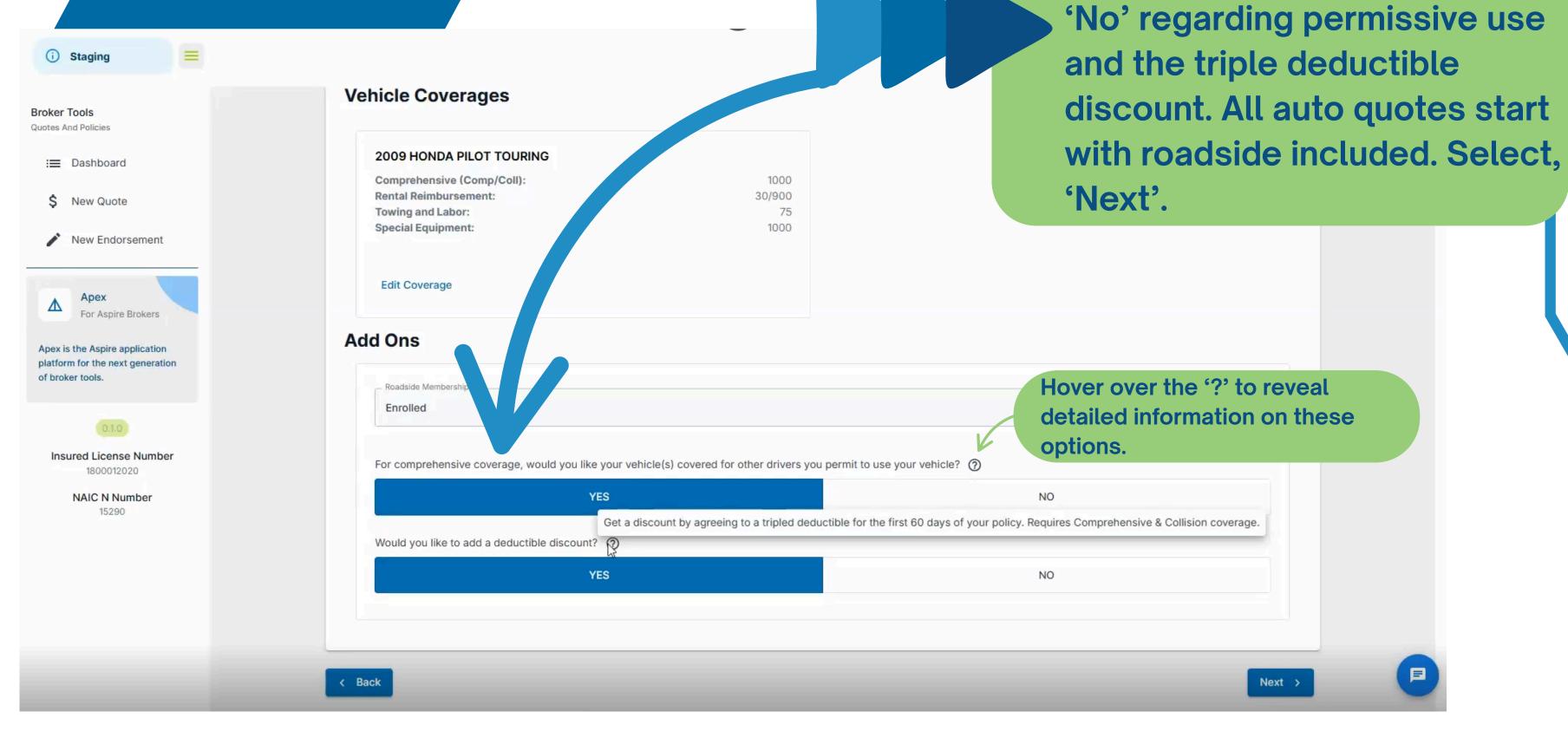


STEP 10 Continued-Modification of Coverages





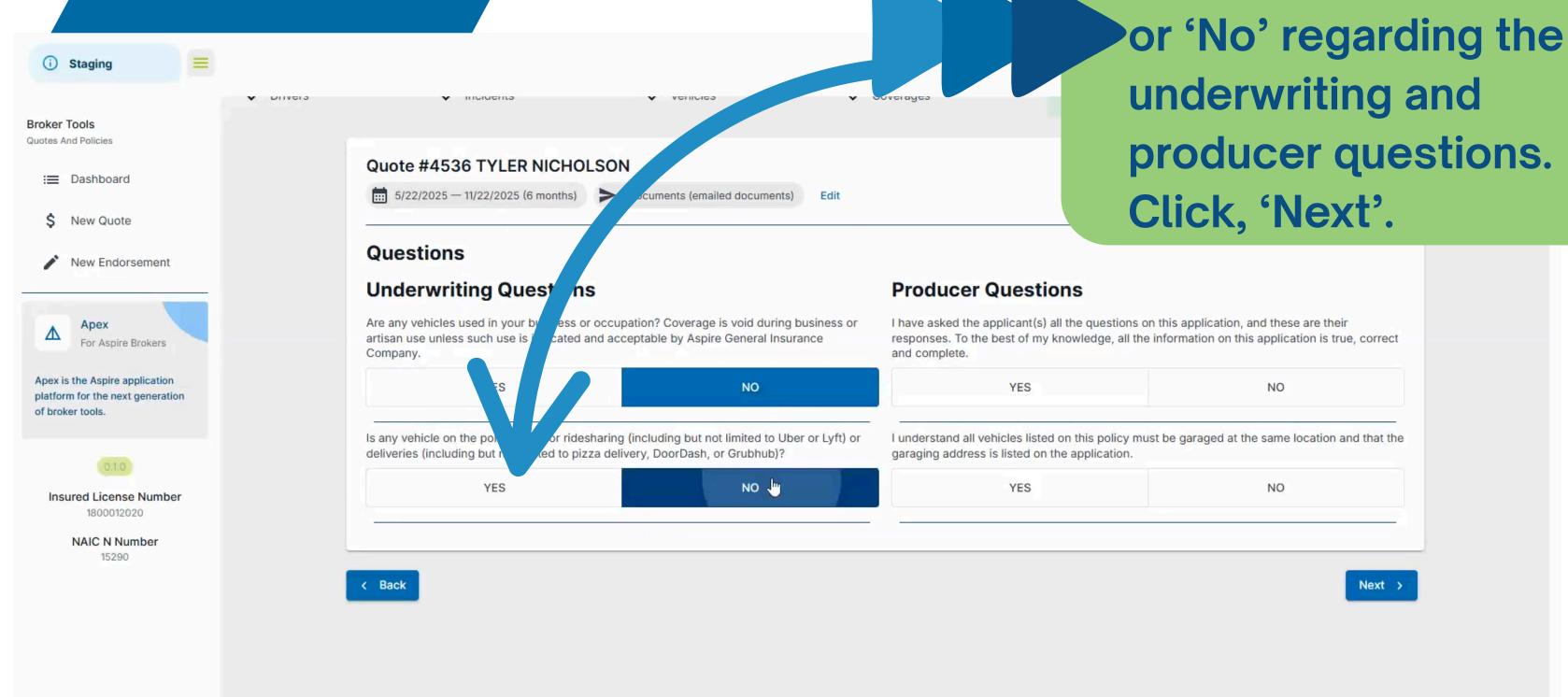
STEP 11- Select Add Ons





At this time, Select, 'Yes' or

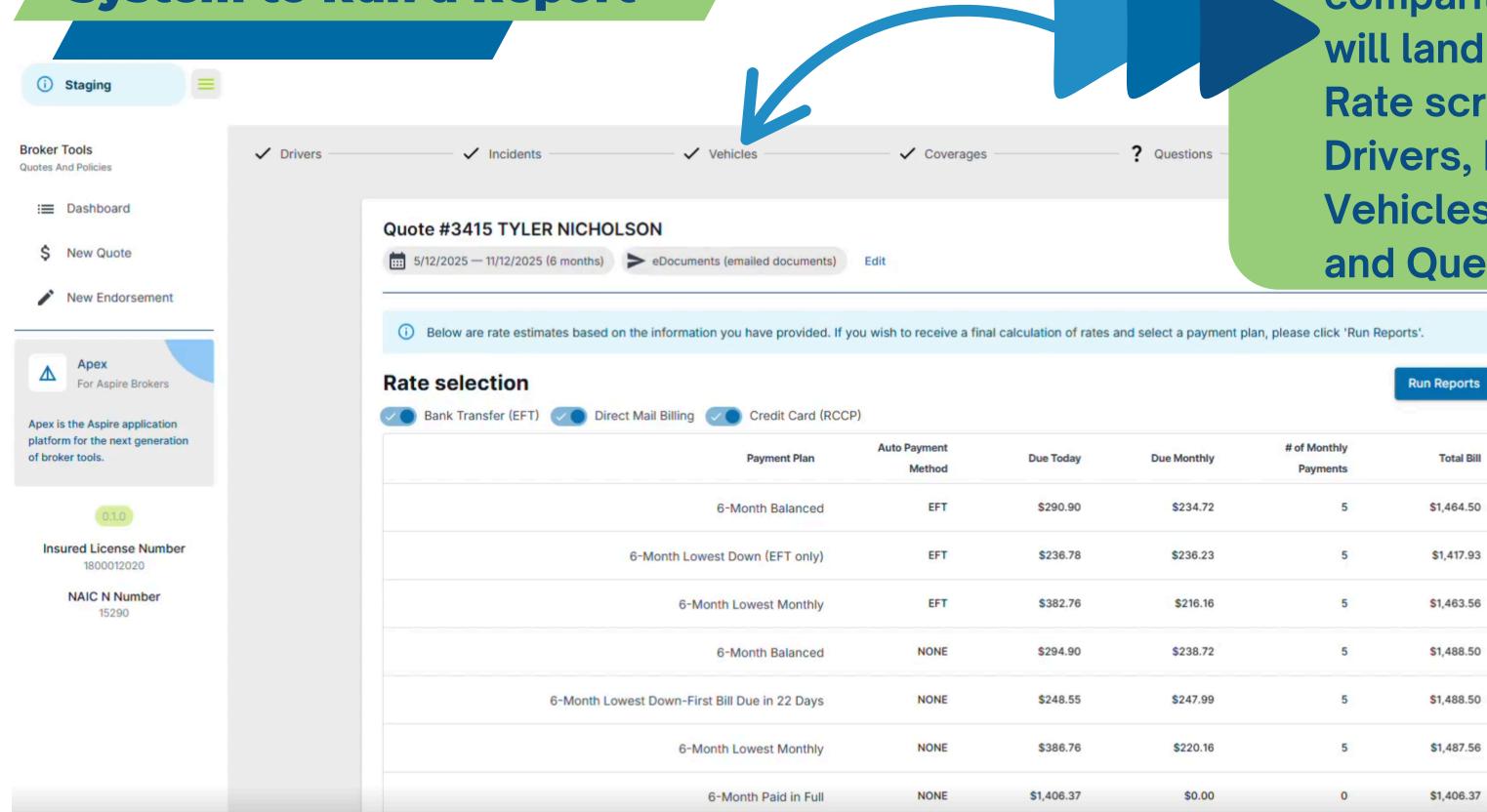
STEP 12- Answer Underwriting and Producer Questions.





At this time, Select, 'Yes'

STEP 13- Bridge to Aspires System to Run a Report

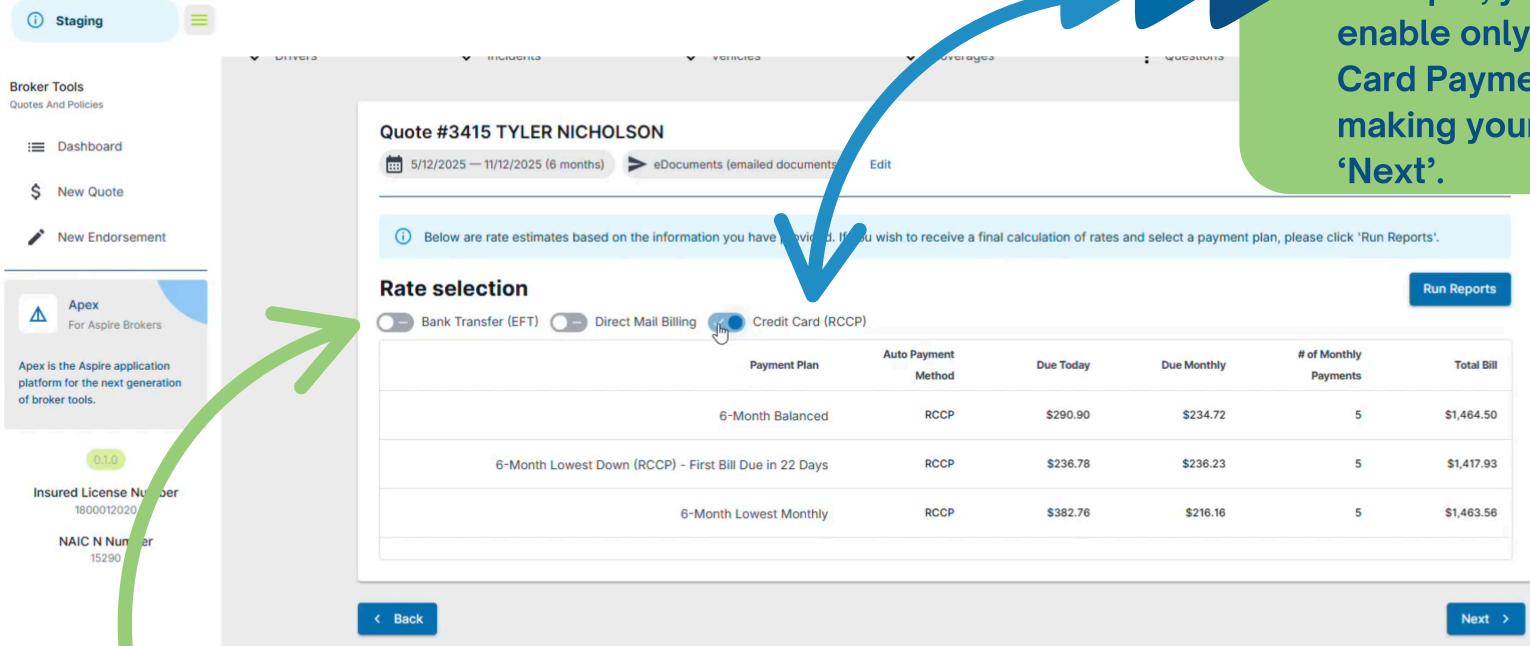


After inputting the information into your comparitive rater, you will land directly on the Rate screen, bypassing Drivers, Incidents, Vehicles, Coverages, and Questions.





STEP 14- Select a Payment Plan



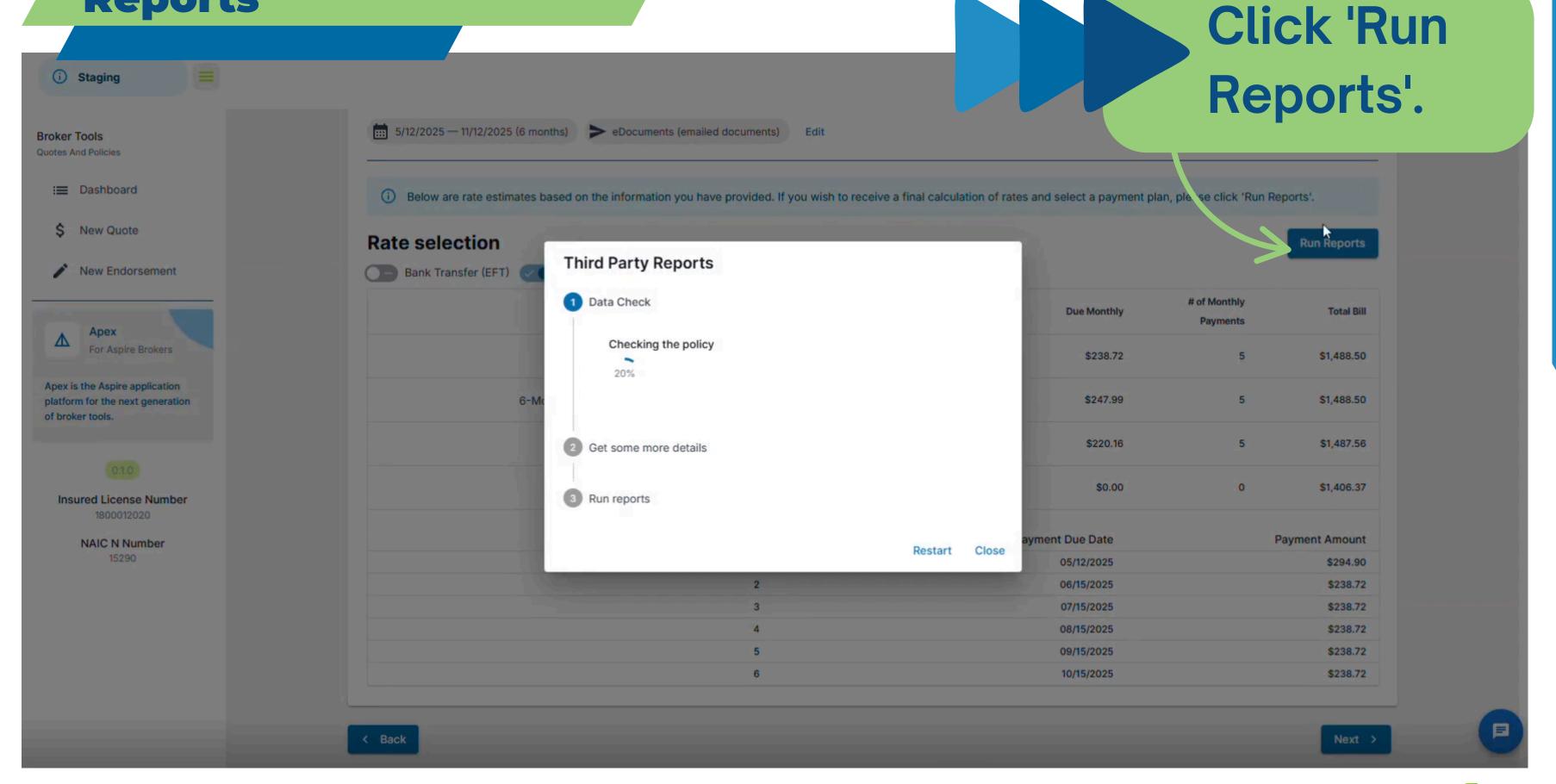
Please Note: If you choose the EFT/RCCP (recurring credit card payment) option, you will be prompted to enter bank information for future payments.

On the Rate screen, you can either select payment plans that suit your client, or keep the existing options. For example, you might decide to enable only Recurring Credit Card Payment (RCCP). After making your choice, click 'Next'.



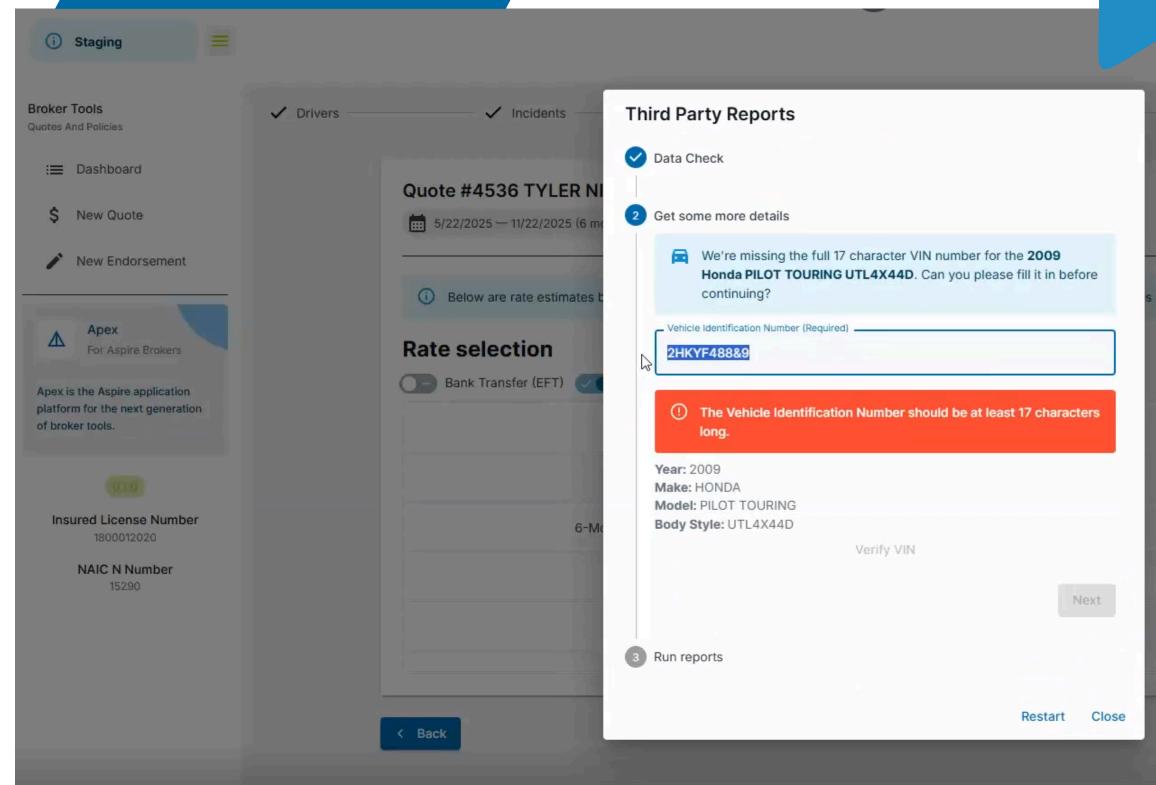


STEP 15- Run Initial Reports

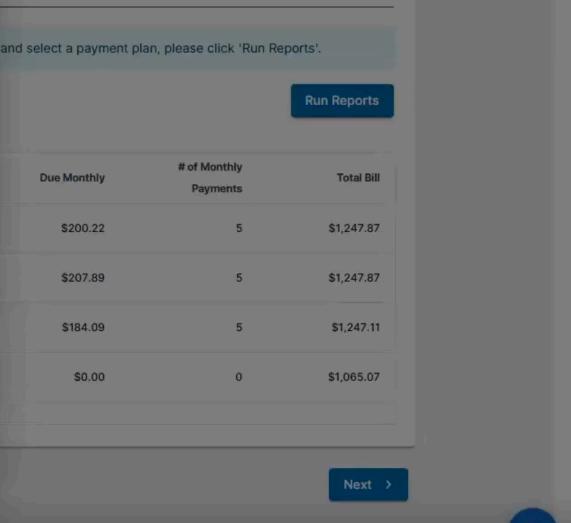




STEP 15 Continued- Run Initial Report



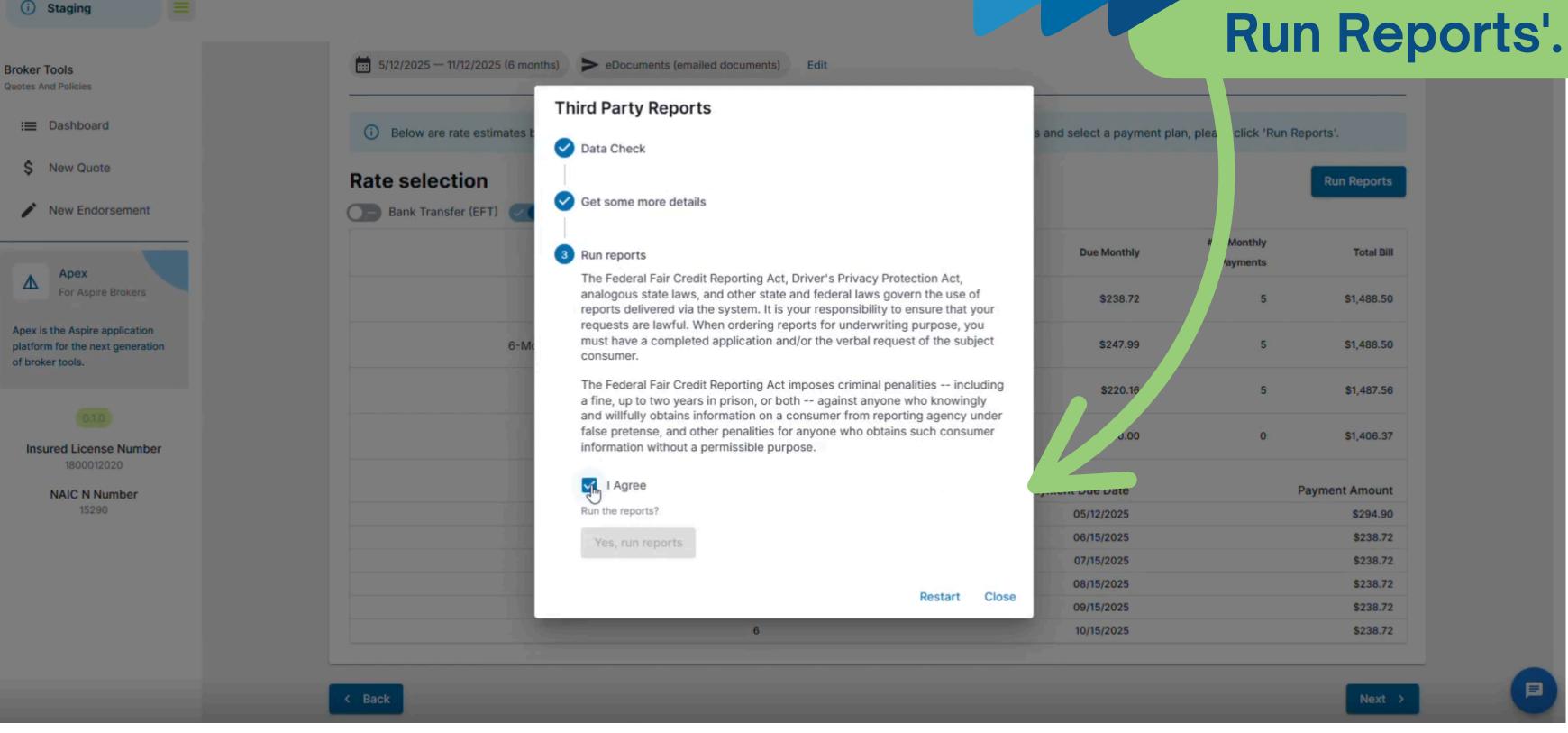
If any imformation is missing. You will be prompted to edit this screen.



✓ Questions



STEP 15 Continued- Run Initial Report

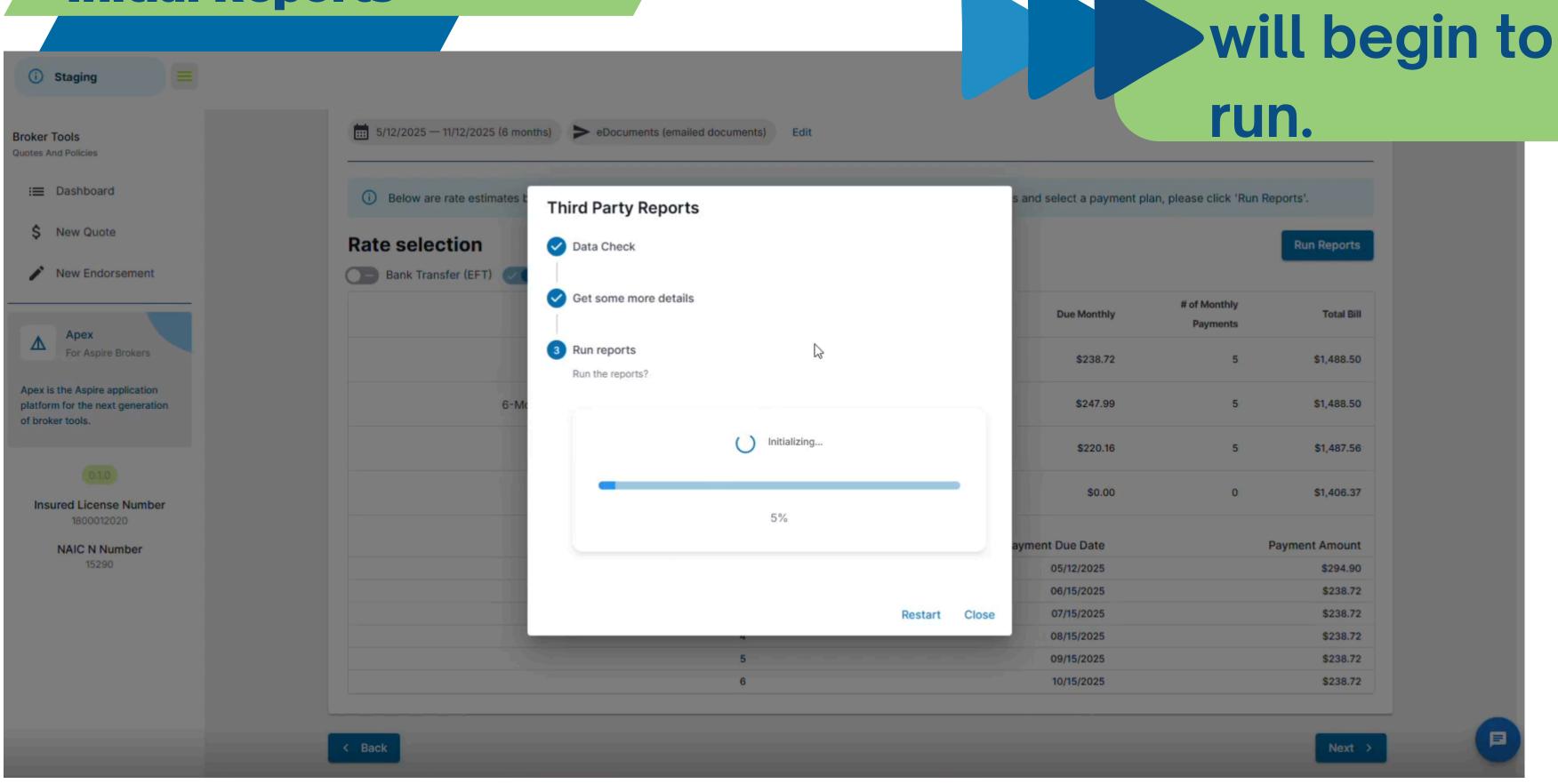




Click, 'Agree'.

Select 'Yes,

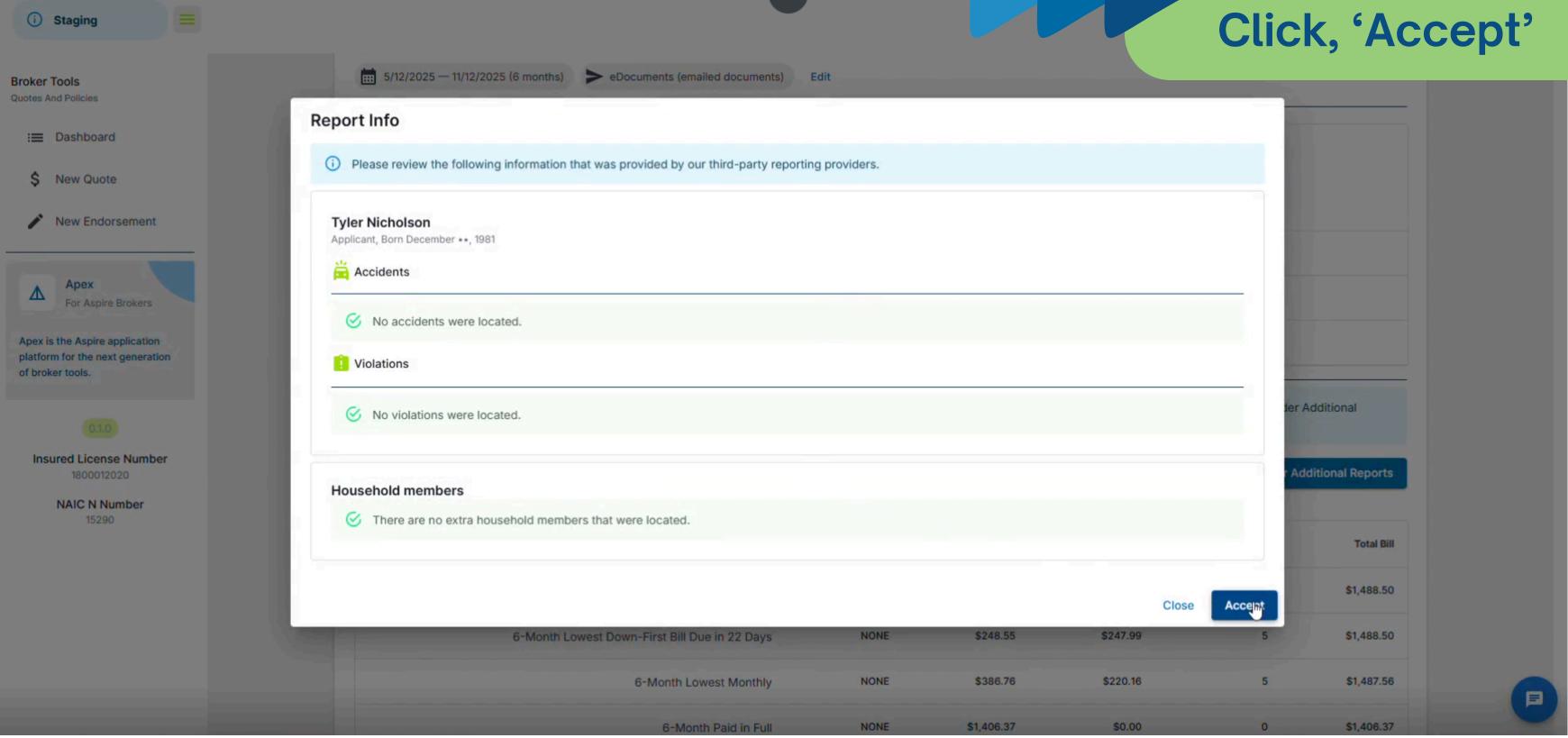
STEP 15 Continued- Run Initial Reports





The report

STEP 15 Continued- Run Initial Reports

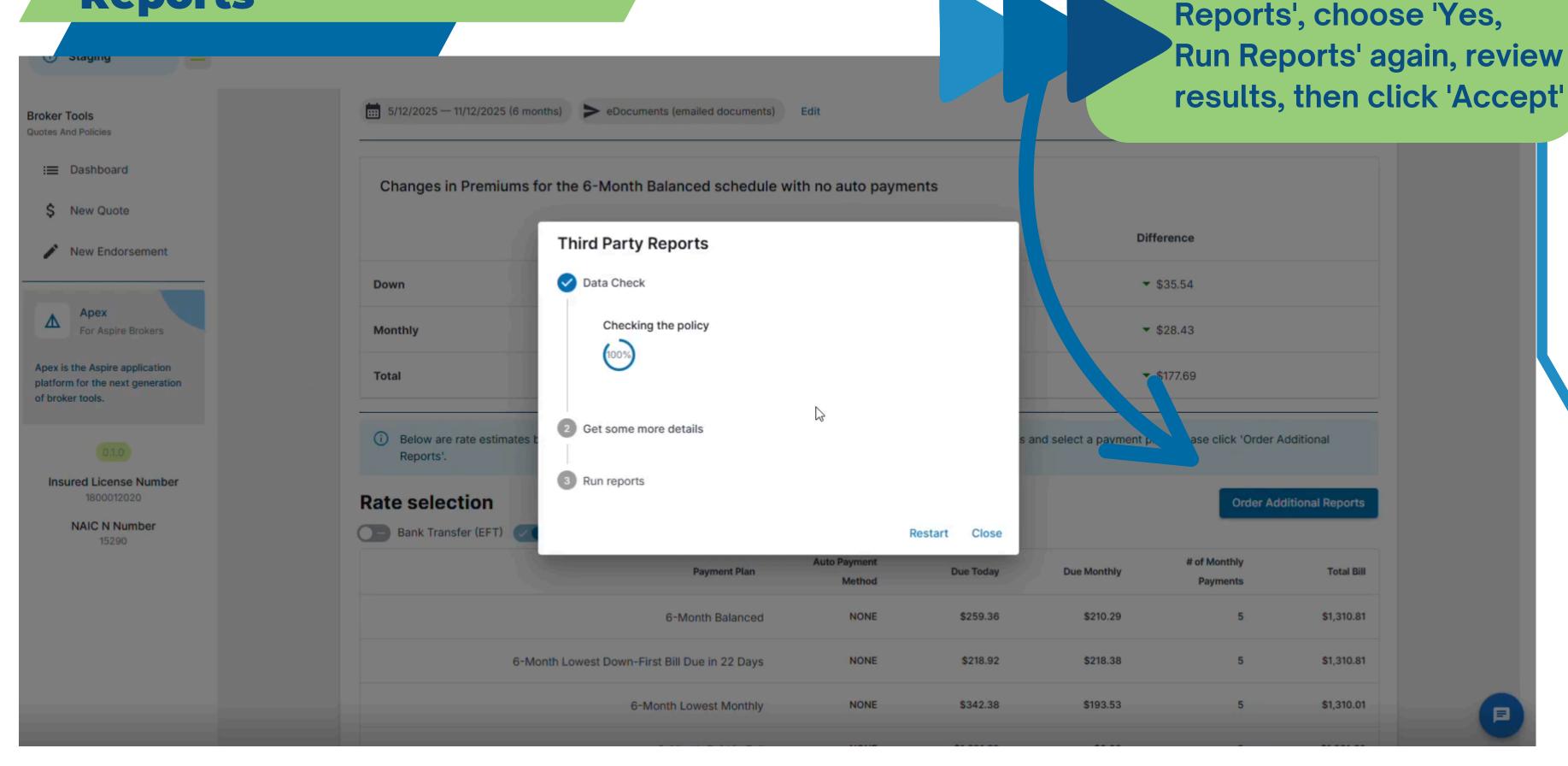




Nothing was found

on the report.

STEP 16- Run Additional Reports





Click 'Order Additional

STEP 17- Choose Payment Plan





Broker Tools

Quotes And Policies

Dashboard

\$ New Quote

New Endorsement

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Insured License Number 1800012020

> **NAIC N Number** 15290

6

Select which billing plan to move forward. Click, (NIOV+)

Monthly	\$220.16	\$193.53	NEXL.
Total	\$1,487.56	\$1,310.01	▼ \$177.55

Rate selection

Re-Run Reports

Bank Transfer (EFT) Direct Mail Billing Cr ard (Re	CCP)					
Payment Plan	Auto Payment Method	Due Today	Due Monthly	# of Monthly Payments	Total Bil	
6-Month Balanced	NONE	\$259.36	\$210.29	5	\$1,310.8	
6-Month Lowest Down-First Bill Due in 22 Days	NONE	\$218.92	\$218.38	5	\$1,310.8	
6-Month Lowest Monthly	NONE	\$342.38	\$193.53	5	\$1,310.0	
6-Month Paid in Full	NONE	\$1,231.60	\$0.00	0	\$1,231.6	
#	#		Payment Due Date		Payment Amoun	
1		05/12/2025			\$23.00	
2		06/15/2025			\$ 05.05	
3		07/15/2025			\$ 05.0	
4		08/15/2025			\$ 05.0	
5		09/15/2025			\$,05.0	

10/15/2025





\$ 05.04



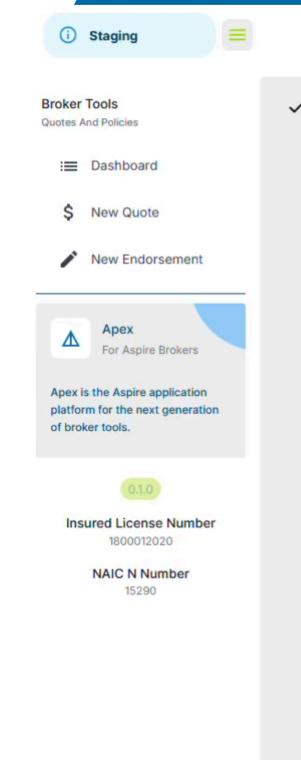


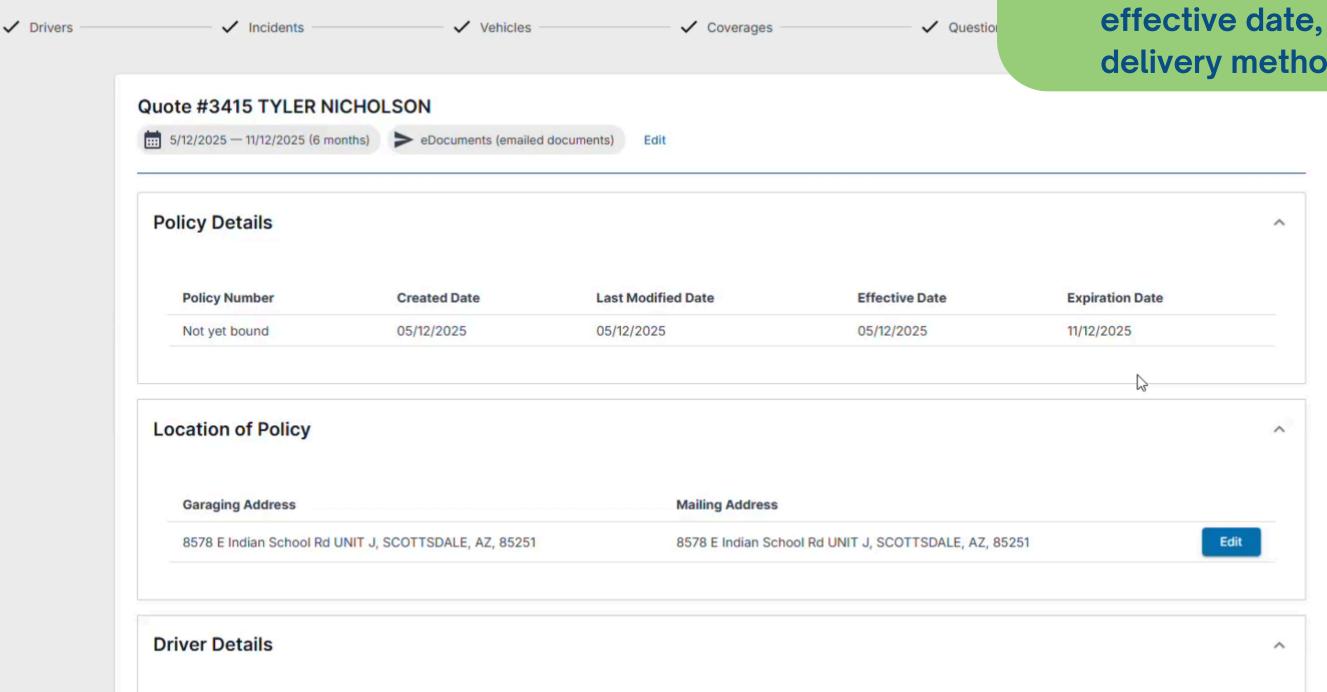
STEP 18- Review and Edit Details

First Name

Middle Name

Last Name

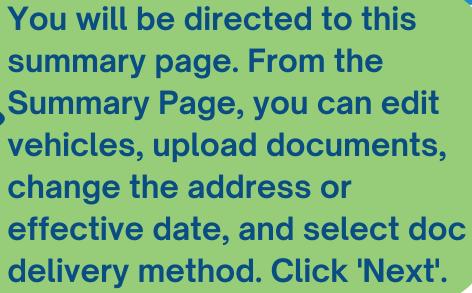




Date of Birth

Gender

Relation to Applicant





STEP 19- Process Payment for Down Payment



Quotes And Policies

:≡ Dashboard

New Quote

New Endorsement

∧ Ap

Apex

For Aspire Brokers

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0.1.0

Insured License Number

NAIC N Number 15290

selected. Please choose the most applicable option Confirm and Pay - Quote #4536 TYLER NICHOLSON for your specific client. i Please select the payment methods you would like to use for a payment. Choose a Down Payment method Credit Card Bank Transfer Agency Trust 🗸 You have chosen not to set up automatic payments. Your recurring bill will be sent to you by mail to 8578 E Indian School Rd J Scottsdale, AZ 85251. **Confirm Recurring Direct Mail Billing Down Payment Method** \$265.62 Agency Trust Reset Monthly Payment Method \$215.30



Choose your preferred

demonstration purposes,

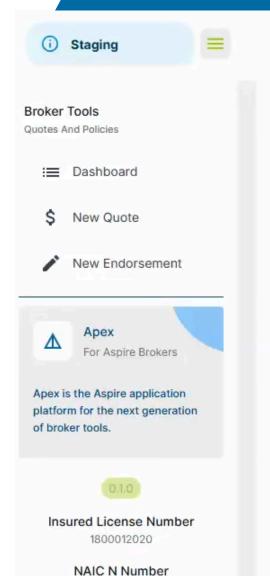
"Agency Trust" has been

payment method. For

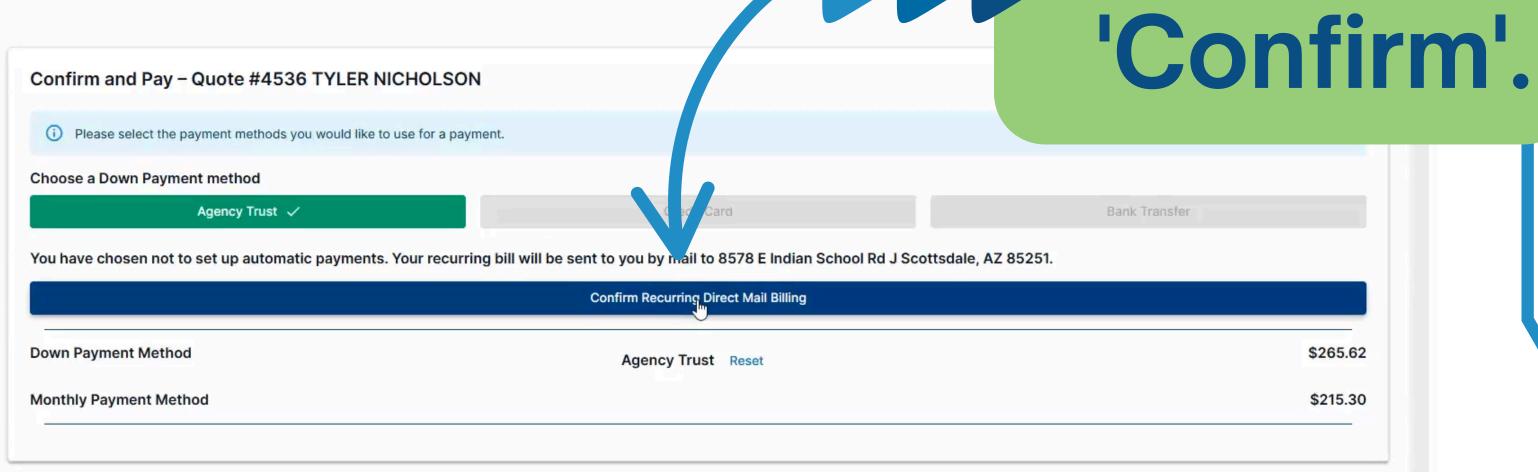


STEP 19 Continued- Process Payment for Down Payment

< Back



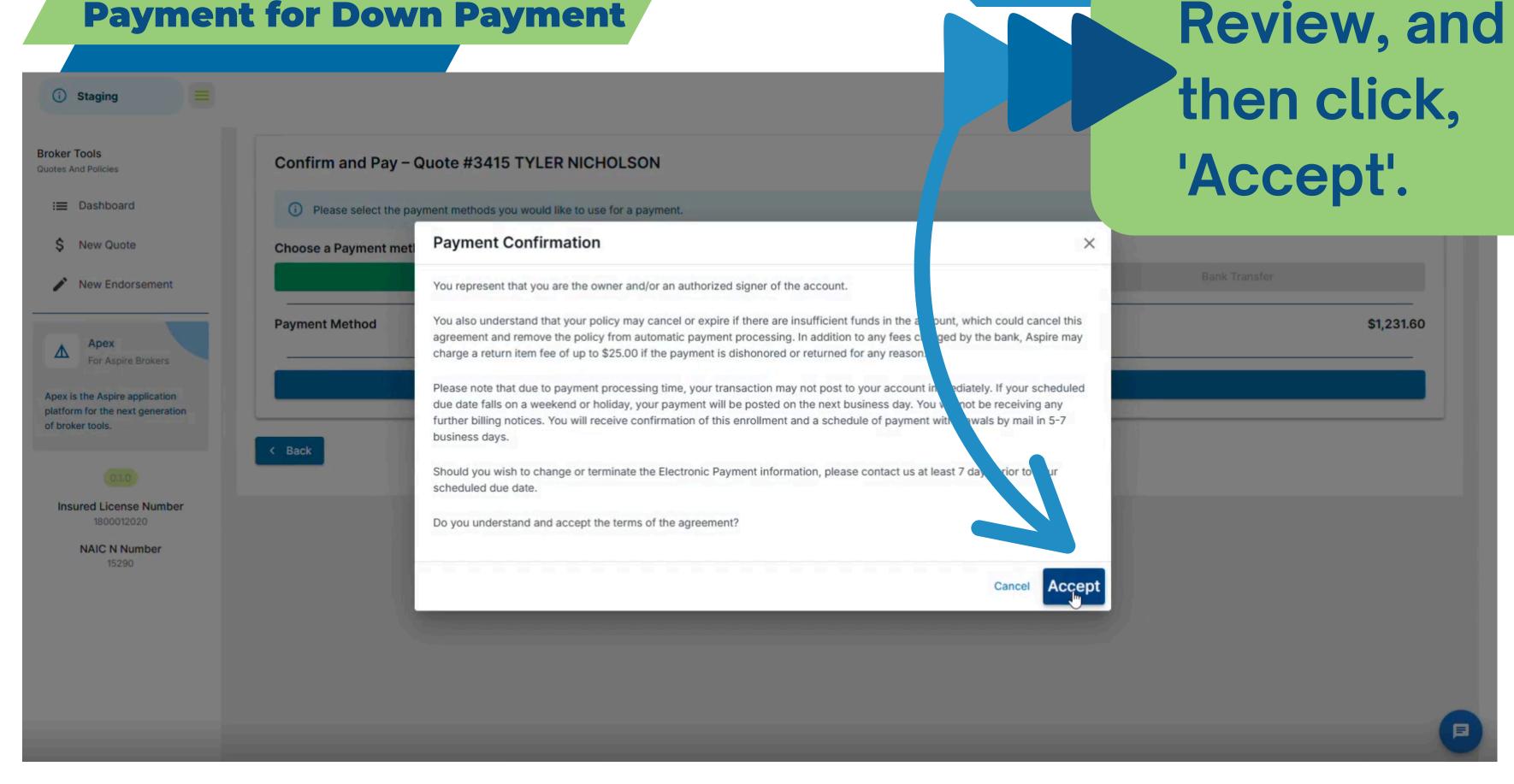
15290





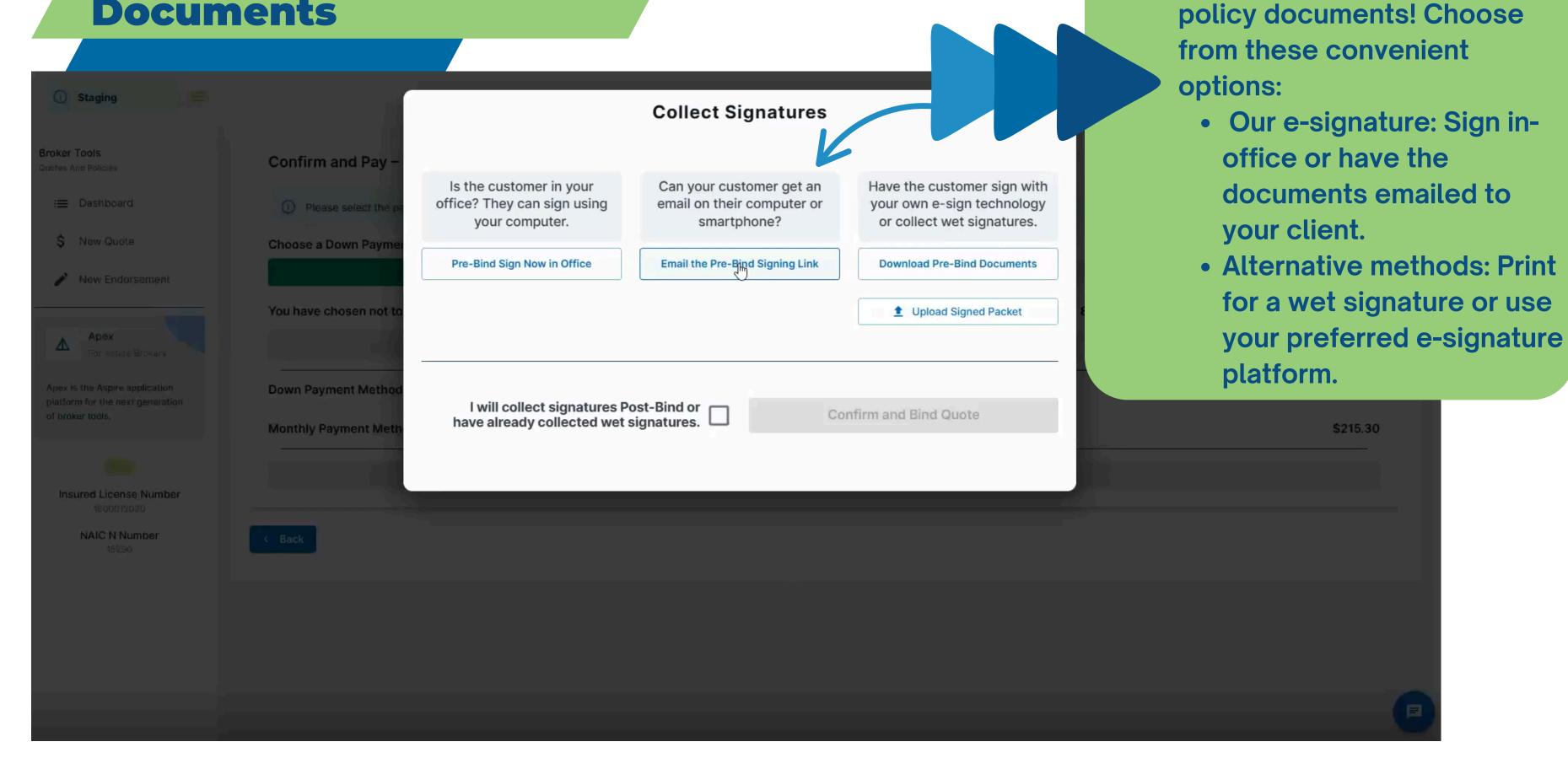
Click

STEP 19 Continued- Process Payment for Down Payment





Step 20- eSign Documents





It's time to sign your Aspire

Step 20 Continued- eSign Documents



Sign

Tyler Nicholson

Enter Your Name and Initials

Initials
T. N.

Tyler Nicholson

Signature

Draw Custom Signature and Initials

Clear Custom

The name entered above will be used as legal authorization for the following documentation.

☑ I agree to the Terms & Conditions

Preview

Sample Document

Authorize

Please Sign Below:

Tyler Nicholson
Signature

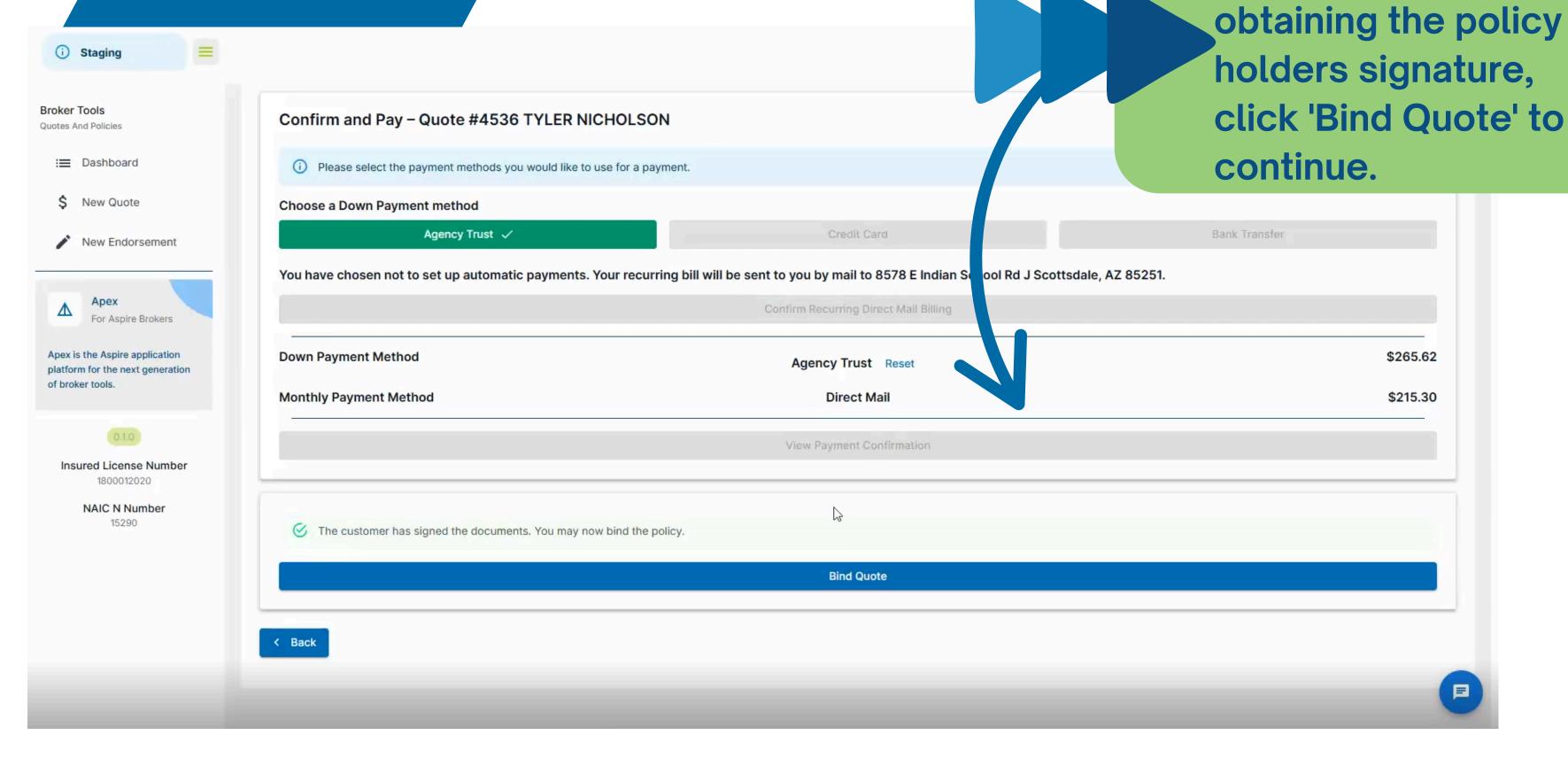
T. N.

If your customer is in office and would like to select the, Pre-bind sign now in office. This screen will populate and the customer may complete the eSign process. Under no circumstances may a producer or agent complete these steps on behalf of the client.

Your timezone is automatically detected to be (UTC-08:00) Pacific Time (US & Canada). Change.



Step 20 Continued- eSign Documents

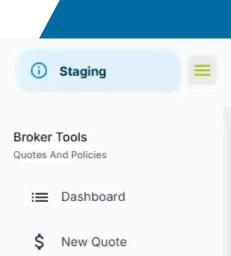




After choosing your

preferred method of

Step 21- Review Final Documents



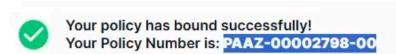


New Endorsement

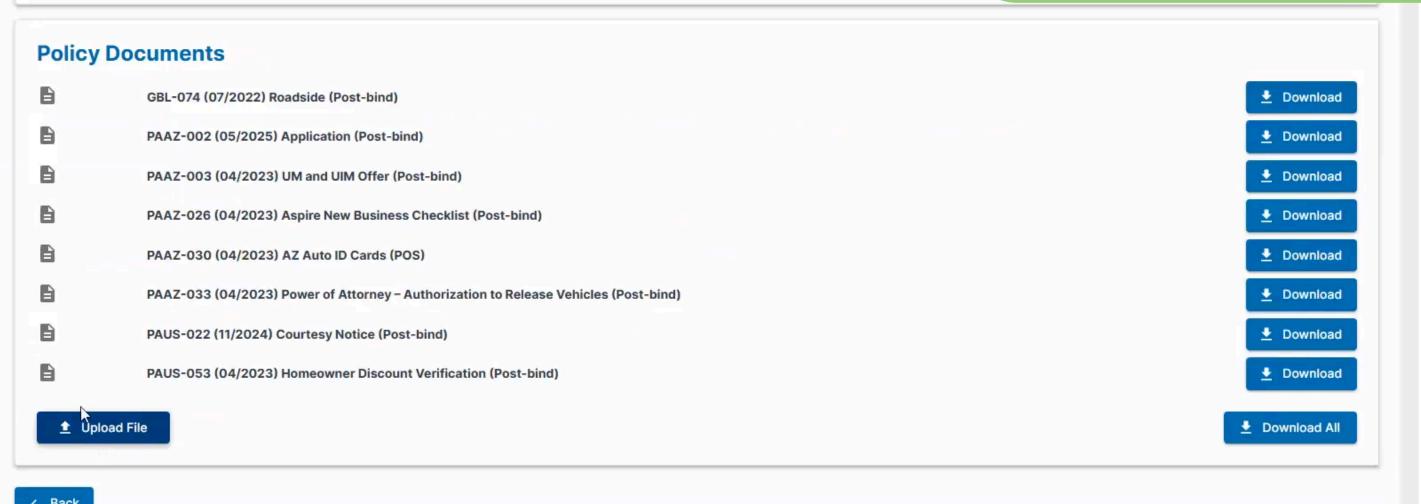
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Insured License Number 1800012020

> **NAIC N Number** 15290



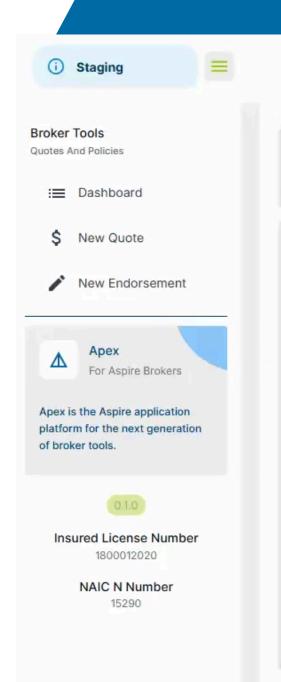
On this page, you can view and download all policy documents. You can also upload additional documents (like photos for comprehensive/collision coverage) or resend eSign links.

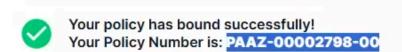






Step 21 Continued- Review Final Documents





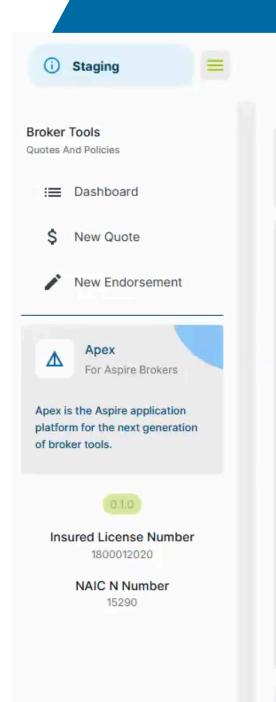
Select,
'Download All' to
download the full
policy package.

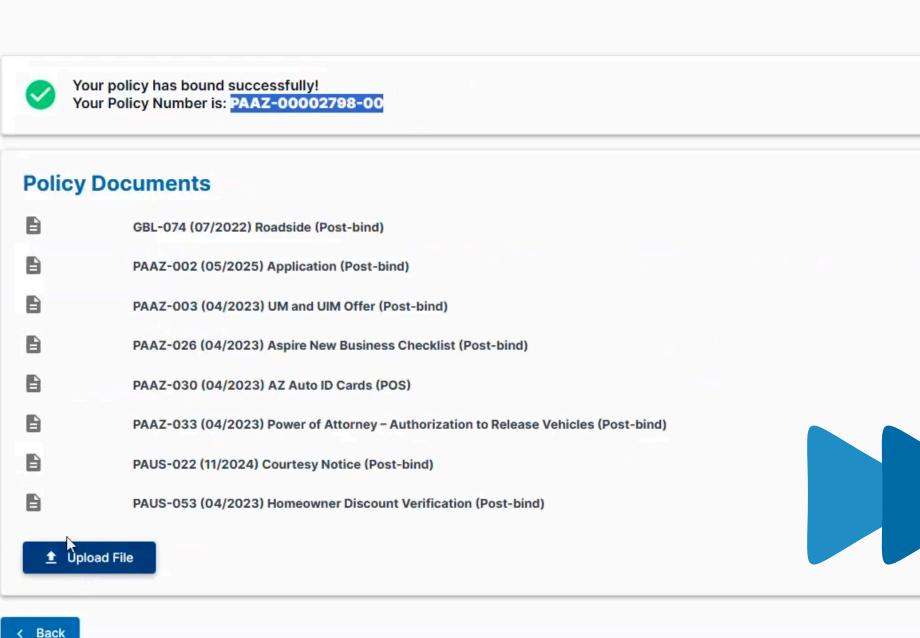






Step 22- Access the Policy





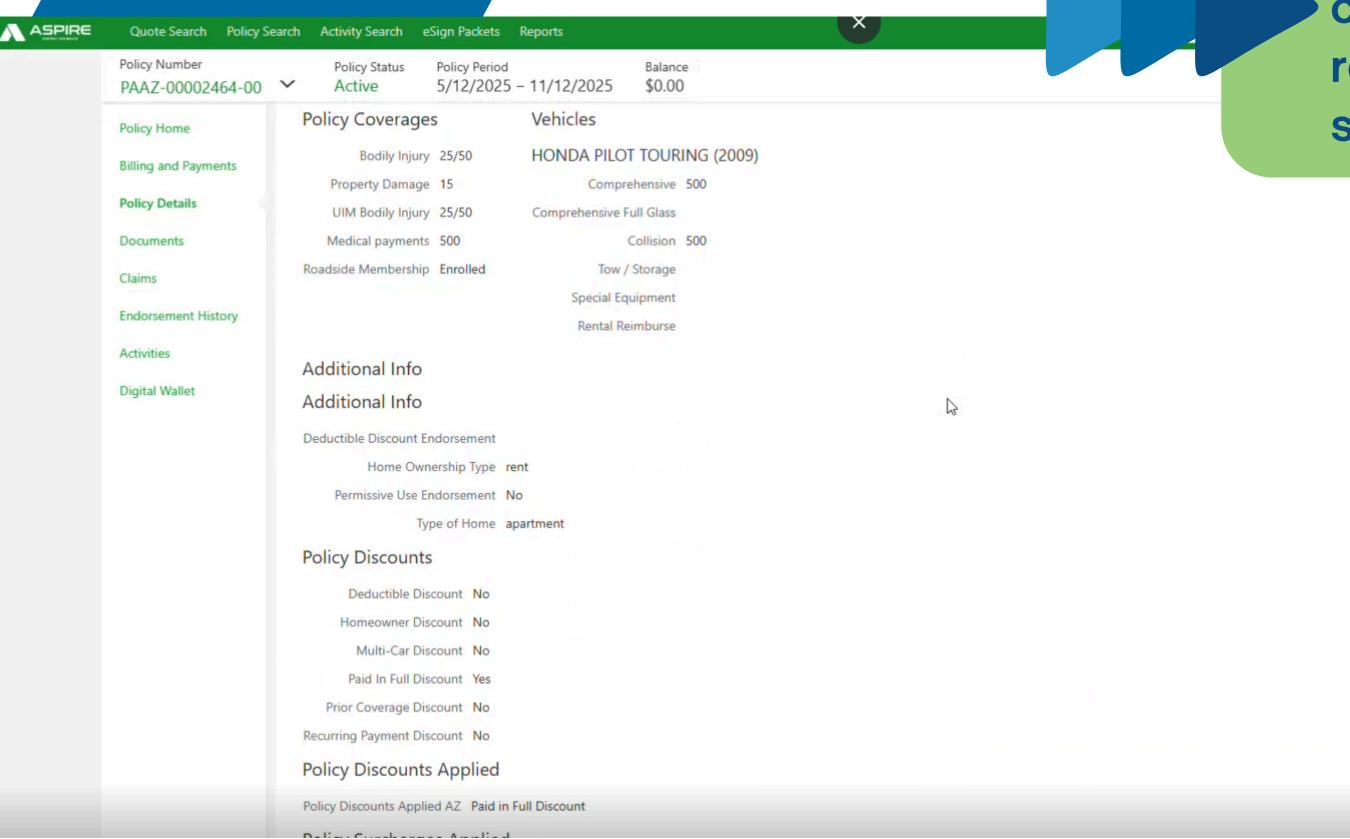


Click, 'View in Policy
Management' to access policy details.





Step 22 Continued-Access the Policy



You are now in policy home. From here you can view activities, receipts, and point of sale documents.

Open chat



Congratulations, you have now completed the AASPIRE Rater Training!