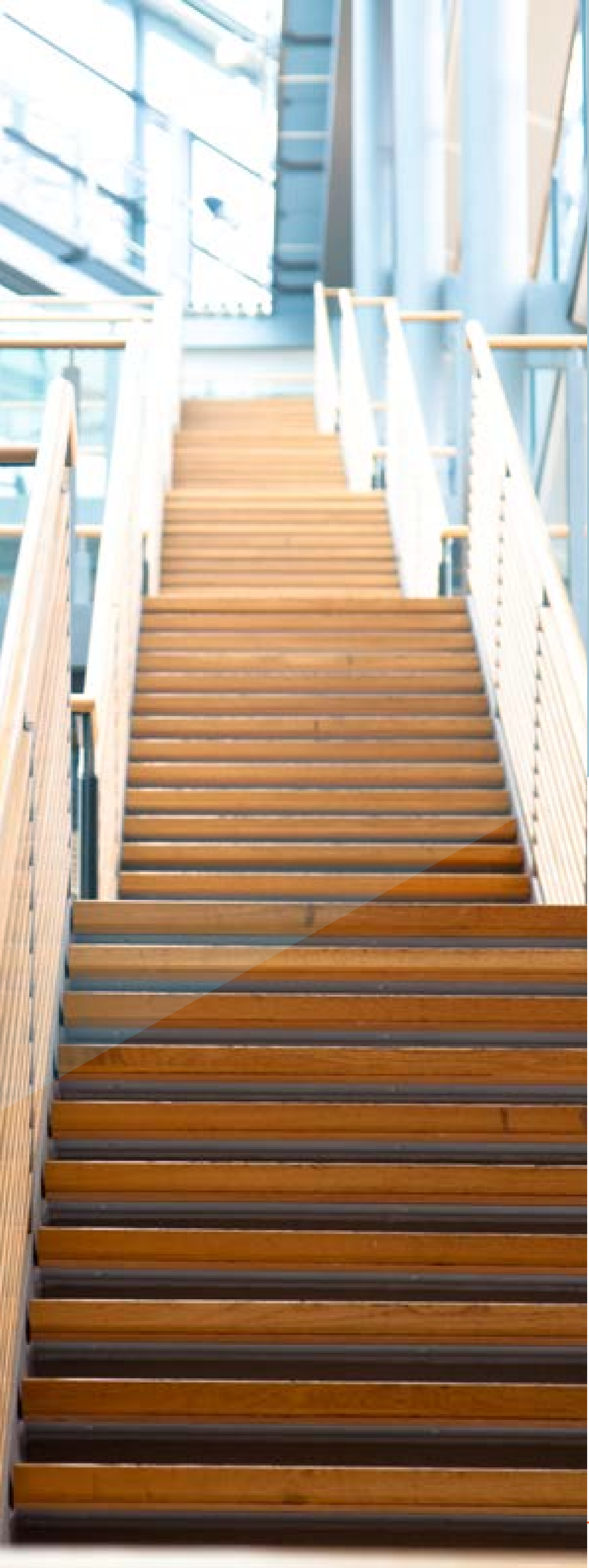
Dovetail for Agents Playbook

simplify your business, amplify your returns

dovetailinsurance.com

DOVETAIL
a VICTOR company



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Dovetail for Agents reaffirms our commitment to agents with an intuitive user interface, fast return on quotes, end-to-end quote, bind and policy issuance, and access to multiple top insurance carriers and competitive products.

Lucrative

Increase profitability through operational efficiency. Dovetail for Agents lets you quote, bind and issue in minutes.

Simple

Policy issuance has never been so easy. Enter your client's information into Dovetail for Agents once and get quote options for Workers Comp, Business Owners Policies and General Liability.

Superior Coverage

AmTrust FINANCIAL

Workers Comp

Homesite

Business Owners Policies
General Liability

Flexible

Dovetail for Agents lets you work remotely and manage your new business anywhere, anytime.

Fast

Most small new business accounts require a few questions to obtain a quote. Quotes can then be bound instantly in Dovetail for Agents.

Customer Support

Numerous opportunities to reach out!

- Email our support team at info@dovetailinsurance.com
- Contact our Sales team via email/phone
- Use our Online Chat on dovetailinsurance.com and dovetailforagents.com Moday - Friday, 8:00 AM ET - 9:00 PM ET.

LET US HELP YOU GROW YOUR BUSINESS

Register at dovetailinsurance.com and start quoting!

Register at dovetailinsurance.com

New Users

All Dovetail for Agents users must have their own username and password. Please follow the instructions below to create an account.

- Visit dovetailinsurance.com and click "register"
- Enter information in the required fields and submit the form
- You will receive an email from the Dovetail Team if any additional information is needed
- Once your agency license and E&O are validated, you will receive a Welcome email including your personal login details.

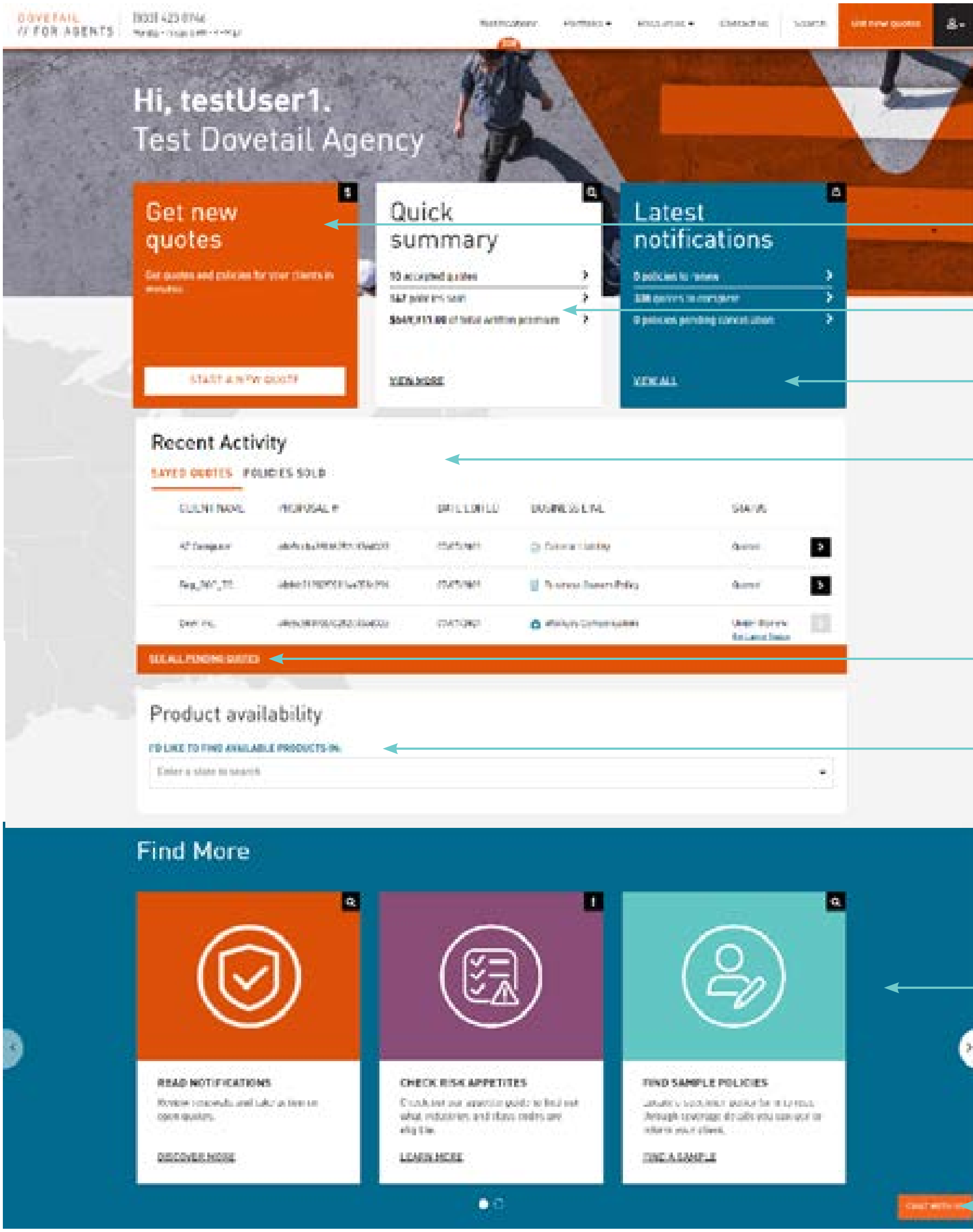
Returning Users

If you already have a Dovetail for Agents account, visit dovetailinsurance.com/login and start quoting!

If you think you may already have a Dovetail for Agents account, but are having trouble logging in, email signup@dovetailinsurance.com for assistance.

REGISTRATION OR LOGIN QUESTIONS?
Email signup@dovetailinsurance.com

Navigate the Dovetail for Agents Dashboard



Start a new quote

Summary of all quotes, policies and written premium

Your to-do list

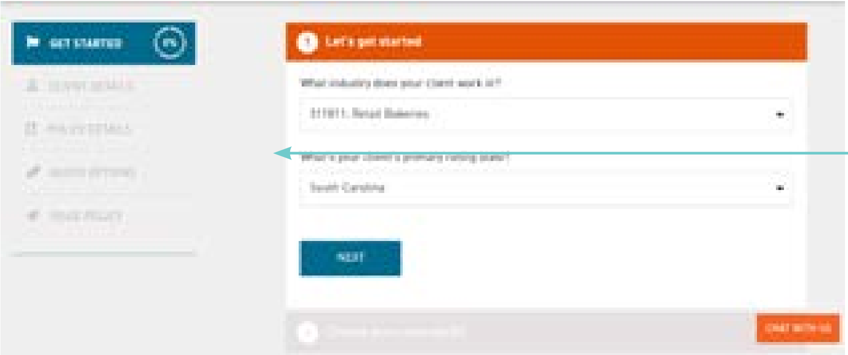
Snapshot of recent activity including details on saved Quotes and Policies written. Click "See All Pending Quotes" for the full list.

Learn what products are available for your clients by state.

Explore the latest news and resources

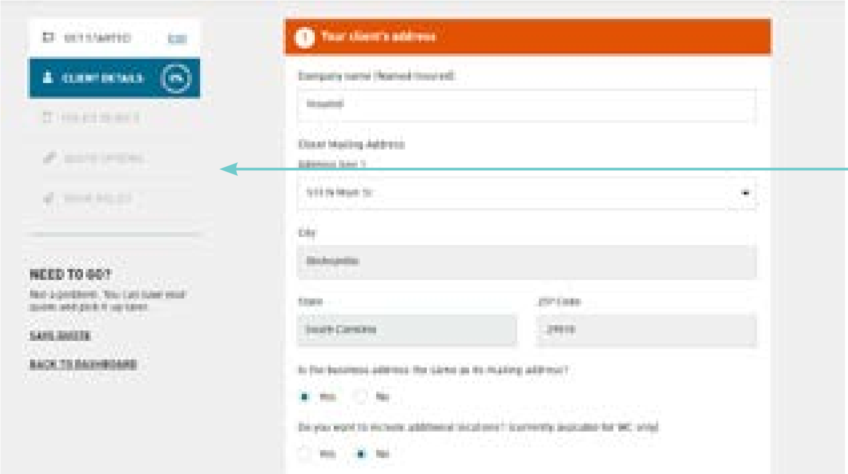
Use the online Chat Feature for immediate assistance.

Start Quoting



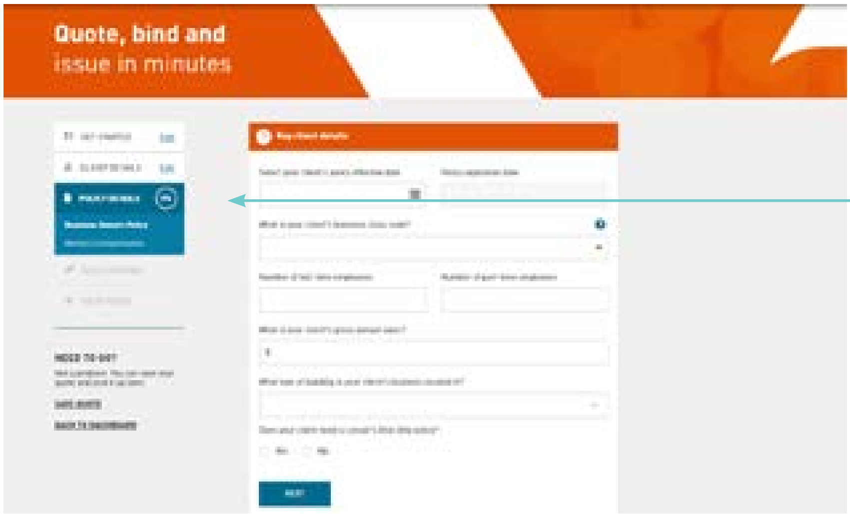
The online process is organized in five different sections: To Get Started, enter basic information and choose the coverages you want to quote.

Enter Client Data



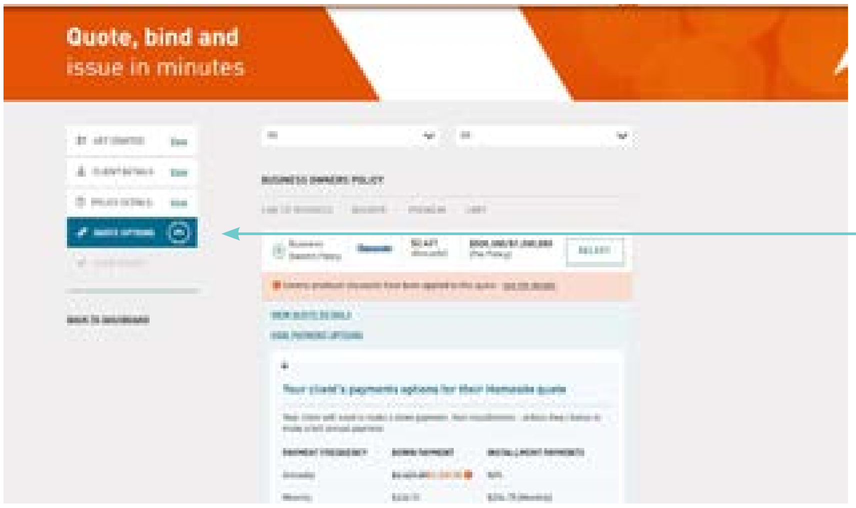
Next enter Client Details including location and operations information.

Enter Policy Details



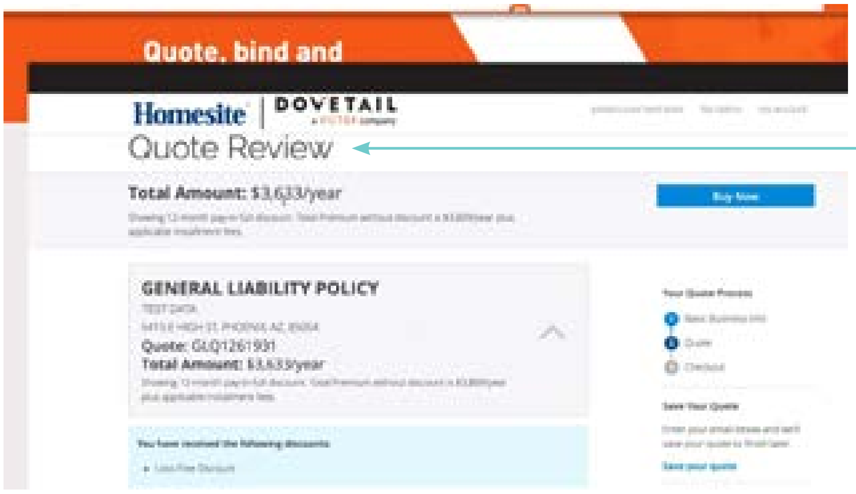
Then policy details for all coverages you wish to quote including your client's business, property, liability and optional coverages.

Review Quote Options



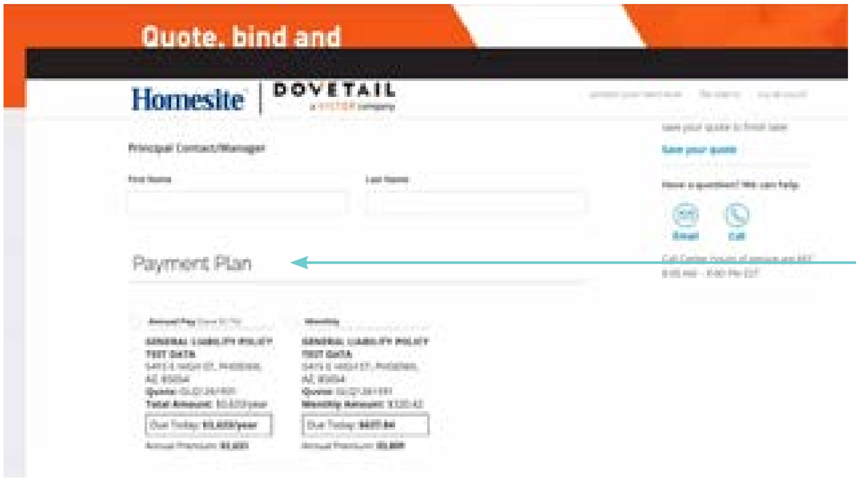
Next you will review and select the quote options

Issue Quotes



Then it is time to bind and issue!

Select Payment Option and Bind!

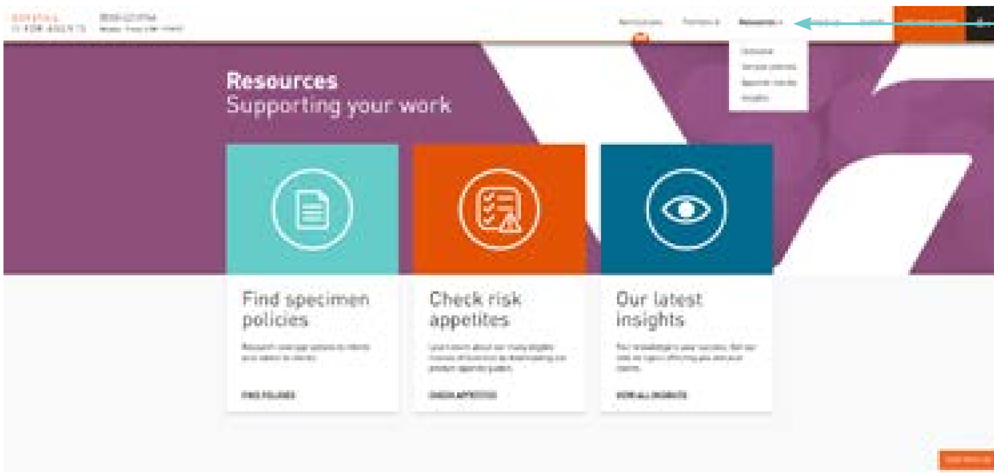


You will also receive details on payment options and instructions

Your Portfolio

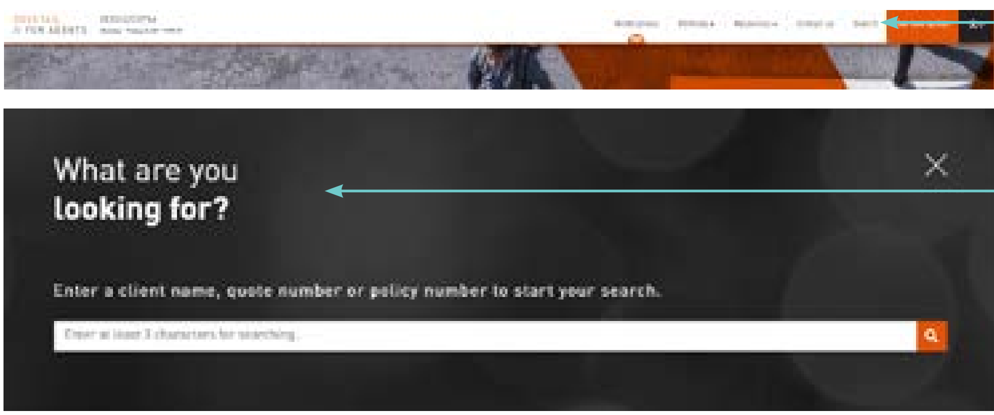
Select "Portfolio" and then "Policies" to review your policy documents

Broker Resources



Select "Resources" to find specimen policies, appetite guides and the latest broker resources.

Search Functionality



Search for quotes and policies easily by using the search function.

A pop up will appear and simply enter your client's name, quote number or policy number to start your search.

Billing Options Explained

AmTrust

Workers Comp

AmTrust does not require a down payment to bind a policy. They will directly bill the insured for the down payment and subsequent payments after that.

Depending on the premium amount, AmTrust has monthly, semi-annual, quarterly, and annual payment options.

AmTrust also has a PAYO (Pay As You Owe) option, which is contingent on payroll being submitted to AmTrust from the insured's payroll company. The insured can set this up on their own after they make the down payment via the AmTrust online account under the billing options.

QUESTIONS?
Call AmTrust Customer Serivce: (877) 528-7878

Homesite

Business Owners Policies/General Liability

Homesite requires a down payment to be submitted in Dovetail for Agents to bind a policy. The down payment is equal to two months' worth of the annual premium if the insured chooses monthly payments.

The insured will then be billed directly for the 10 additional installments (plus billing fees) for the remaining premium for the year.

Annual payment are also available with the full amount due at binding.

QUESTIONS?
Call Homesite Customer Service: (866) 954-9770

Frequently Asked Questions

General Dovetail for Agents Questions

1. **How do I log into Dovetail for Agent?**

   Visit dovetailforagents.com, enter your email address and password and click “Sign In.”

2. **I am trying to reset my password, but have not received the email with reset instructions.**

   Please check your Spam/Junk folder. If you still do not see the password reset email, please email signup@dovetailinsurance.com for further assistance.

3. **I received an “invalid” error for the FEIN number I entered.**

   This is an indication that the risk has already been quoted through another distribution channel and the market has been blocked.

4. **I am unable to bind a Workers' Comp quote that was referred and approved because I cannot change the effective date.**

   Please email the AmTurst Service Center at amtrustservicecenter@dovetailinsurance.com to have the date amended. Please note, this will generally require us to bind on your behalf.

5. **How do I select multiple class codes?**

   This feature is only available for Workers Comp currently. After you select the first class code, start typing the description for the second class code and check the box beside the description.

6. **Where can I find the policy documents?**

   In the top Menu, select "Portfolio" and then "Policies" to find policy documents. Please note, AmTrust policy documents are available immediately, but Homesite policy documents may take a little extra time to appear.

7. **How does my client pay for the policy?**

   Payment requirements vary by carrier. Please see page 7 of this document for additional information on billing options and requirements.

Homesite Product Questions

1. **Do you write general contractors?**

   No, we can only provide General Liability or Workers' Comp coverage for artisan contractors at this time in. Unfortunately, BOP is not available for artisan contractors at this time. Please note, certain class codes are not available in certain counties in New York or Florida.

2. **Can we write multiple locations under one policy for Business Owners Policies or General Liability?**

   Homesite does not currently allow more than one location per policy. Additionally, Homesite does not allow multi-location risks for Business Owners Policies. If a single insured owns multiple locations, we are able to write that risk in multiple unique policies, per location.

3. **Can a Business Owners Policies or General Liability quote contain multiple classes?**

   No, only one class can be chosen per policy; however, a secondary class code may be added manually depending on the risk.

4. **Does Homesite write x-wind?**

   No. If the risk is too close to the coast, they will simply decline.

5. **How do I locate the quote after I receive the quote letter?**

   Navigate to the Dovetail for Agent dashboard and select the risk in question. The pricing page will appear where you are able to view the price and installments.

AmTrust Product Questions

1. **I write direct with AmTrust or access them through a wholesaler, so why should I work with Dovetail?**

   We are unique in distribution as we offer some referral classes that you don't get access to with some other channels.

2. **Do you write ghost policies?**

   We do not write ghost policies, however we will write owner only as long as there is coverage for the owner.

3. **Does AmTrust offer coverage for multi-state policies?**

   Yes, AmTrust will write risks that have locations in different states, however this will trigger a referral to an underwrtier.

   Note: Be sure to include an address in each state your client operates. This will make the process easier if there are ever any claims submitted.

4. **What is the maximum payroll AmTrust will write?**

   There is not currently a cap on payroll, however risks with larger premiums may be referred to underwriting for further review.

Customer Support

General Dovetail Questions

Call (833) 423-0746 or email info@dovetailinsurance.com

Technical Questions

Online Chat in Dovetail for Agents available Monday-Friday from 8:00 AM ET - 9:00 PM ET

If you experience issues logging in, email signup@dovetailinsurance.com for assistance.

If you are a first time user, visit dovetailinsurance.com/register to create a Dovetail for Agents account.

How do I report issues with Dovetail for Agents?

Please email as much information as possible to signup@dovetailinsurance.com including:

- Date/time of error
- Login ID
- Which browser you are using
- Screenshot of error message

If possible, please attempt to access the site from another computer before contacting the support team. If you are able to access Dovetail for Agents from another computer with no issues, this indicates there may be an issue with your computer and connection.

Visit dovetailforagents.com to get started.

This document is for illustrative purposes only and is not a contract. It is intended to provide a general overview of the program described. Please remember only the insurance policy can give actual terms, coverage, amounts, conditions and exclusions. Program availability and coverage are subject to individual underwriting criteria.