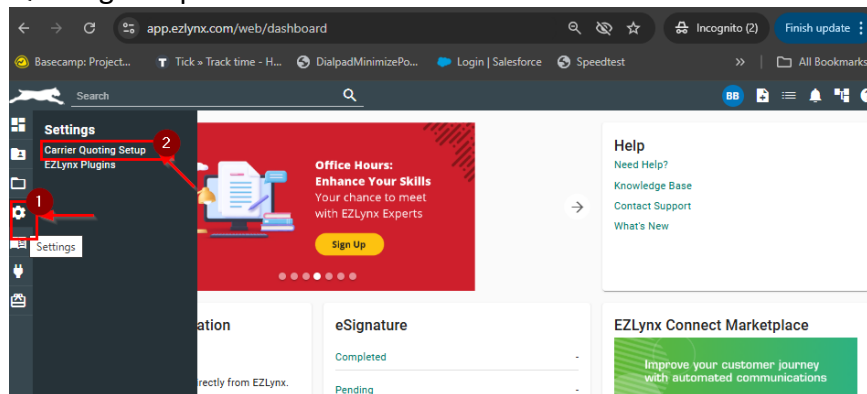


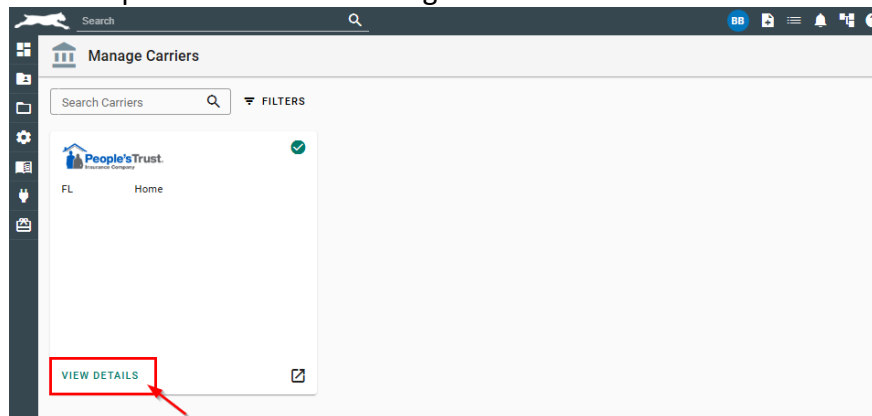
EZ Lynx – People's Trust Insurance Set Up & Tips

How to Set up People's Trust as a Carrier:

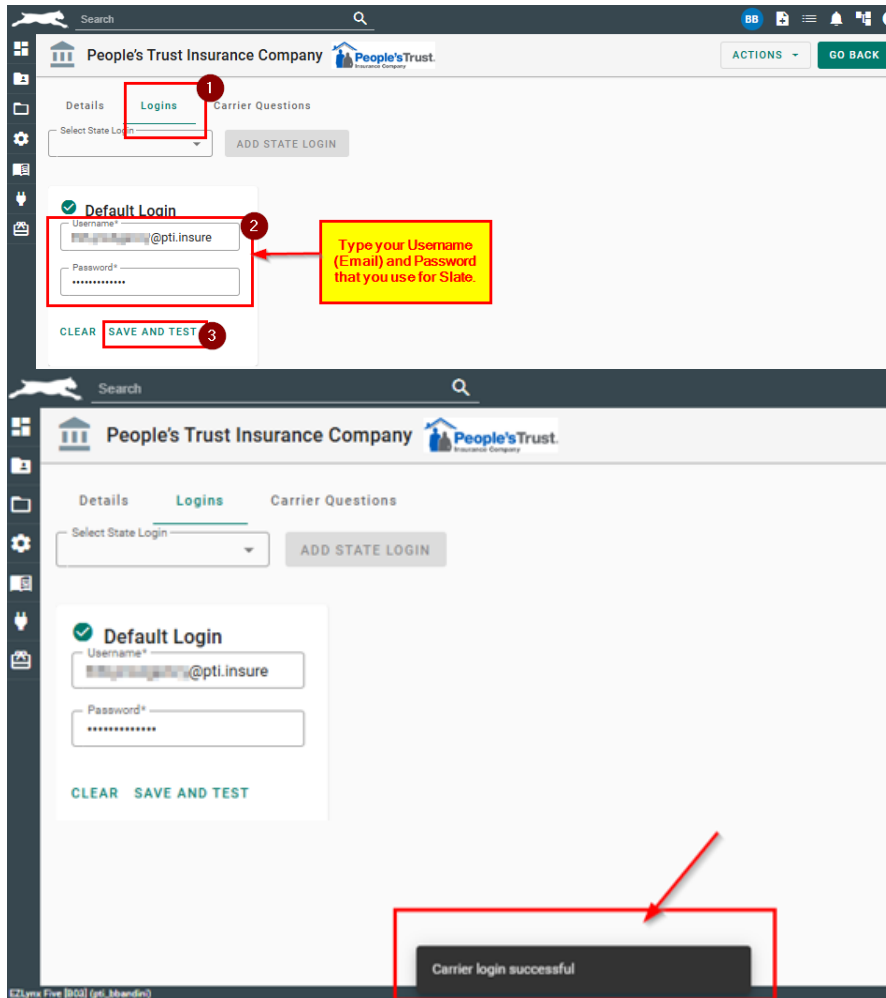
1. In EZLynx, click on the settings icon in the menu to the left, then click on Carrier Quoting Setup.



2. Find People's Trust under Manage Carriers and click on View Details.

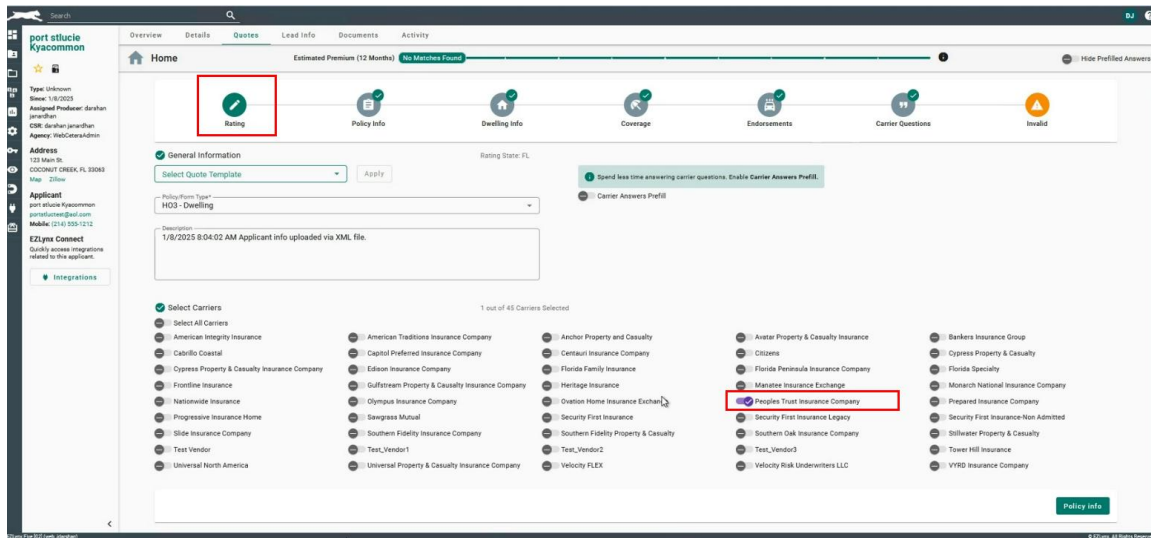


3. Click on the Logins tab at the top of the screen.
 - a. Under Default Login type in your Username (Email) and Password that you use for Slate.
 - b. Click on Save and Test.
 - c. You should see a pop-up at the bottom of the screen that states "Carrier login successful".
 - i. If you do not see this pop-up, then double-check your credentials for Slate and try again.



4. Once you are on the Quotes menu, then go to the Rating tab and make sure People's Trust Insurance Company is toggled on under Select Carriers.

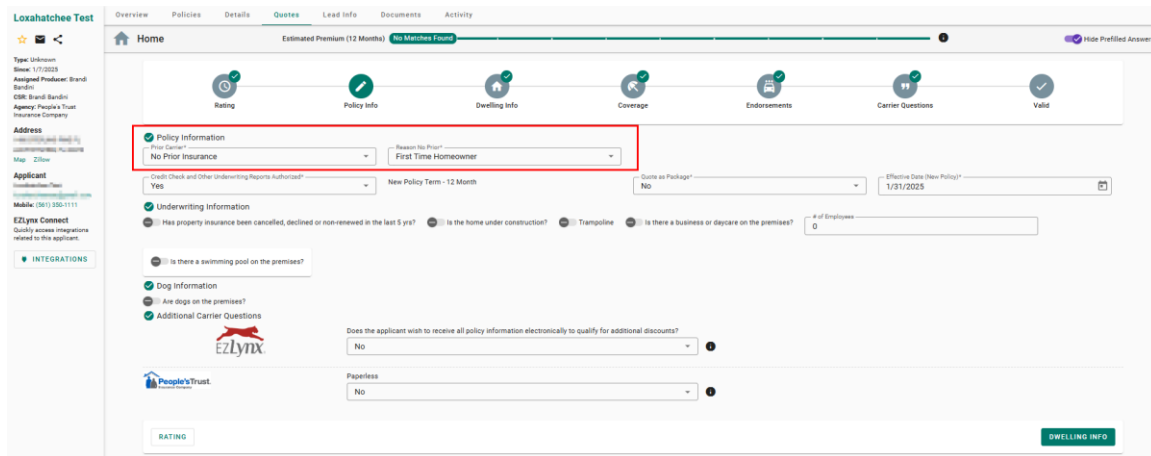




Quoting Tips

1. New Purchase

- a. On the Policy Info tab, go to the Policy Information fields.
 - i. Under the Prior Carrier dropdown menu, select No Prior Insurance.
 - ii. Under the Reason No Prior dropdown menu, select First Time Homeowner.



2. Wind Mitigation Credits

- a. For homes with a Year Built < 2002, you must check the Inspection Done box and enter an Inspection Date in order for any Wind Mitigation Credits entered to bridge to the quote in Slate.
 - i. If you do not have a wind mitigation inspection, then do not check the Inspection Done box.
- b. For homes with a Year Built > 2001, wind mitigation credits will be automatically applied in Slate even if the Inspection Done box is not checked.

The image displays two screenshots of a web form titled "Dwelling Info" under the "Rating" tab. The form is for a policy within "Inside City Limits" and "Within Fire District".

Top Screenshot: The "Wind Mitigation" section has the "Inspection Done" checkbox checked. The "Inspection Date" is entered as 1/24/2025. A yellow callout box with a red border states: "For Wind Mitigation credits to bridge to Slate as entered, Inspection Done must be checked and an Inspection Date entered." Other fields include "Roof Deck Attachment" (C. 8d @ 6/6), "Wind Speed" (Not Applicable), "Roof Covering" (FBC Equivalent), and "Opening Protection" (None).

Bottom Screenshot: The "Inspection Done" checkbox is unchecked. A yellow callout box with a red border and an arrow pointing to the checkbox states: "Wind Mitigation Credits will NOT bridge to Slate, since Inspection Done is not checked." Other fields are the same as in the top screenshot.

3. Coverages

- a. Dwelling
 - i. If the dwelling amount entered is less than the replacement cost value in Slate, then the dwelling amount will be increased in Slate to the minimum replacement cost amount.
- b. Personal Property
 - i. If the Personal Property field is left blank, then it will default to \$0 and Personal Property will be excluded in the quote from Slate.



Progress bar: Rating ✓, Policy Info ✓, Dwelling Info ✓, Coverage (active), Endorsements ✓, Carrier Questions ✓, Valid ✓

✓ Coverage Information

If left blank, will default to \$0

General Coverages

| | | |
|--------------------------------|-------------------------------------|---|
| Dwelling* \$540,000 | Est. Replacement Cost* \$540,000 | Personal Property (default) \$10,000 |
| Loss Of Use (default) \$0 | Personal Liability* 1000000 | Medical Payments* 5000 |
| All Perils Deductible* 1000 | Theft Deductible | Wind Deductible |
| Hurricane Deductible* 2% | | |

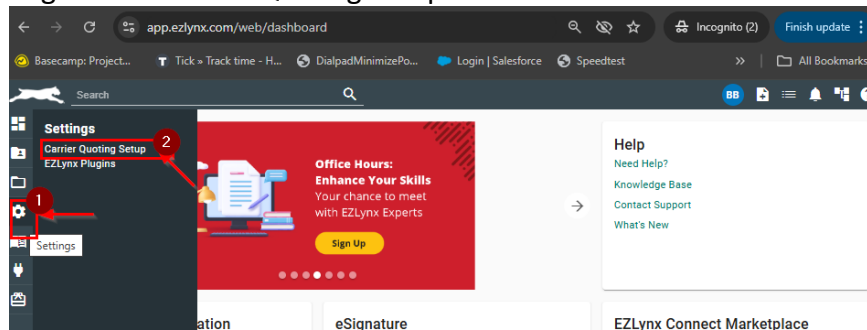
4. Make sure to verify all entries in Slate before coverage is bound.



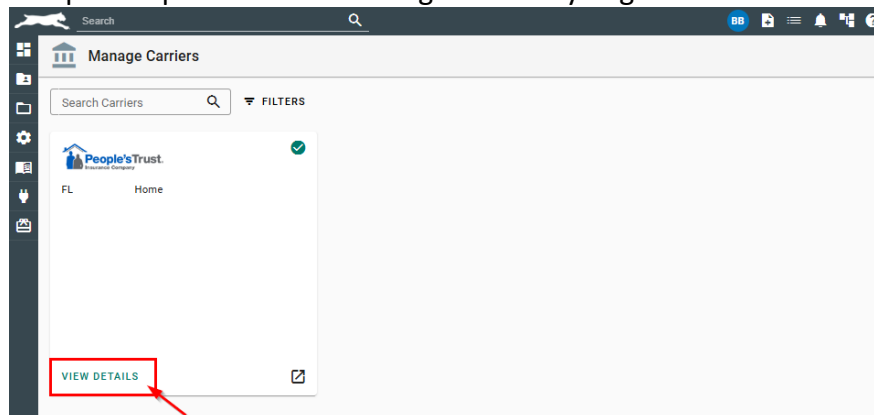
EZ Lynx – People’s Trust Insurance Configuración & Consejos

Como añadir a People's Trust como compañía:

1. En EZLynx, haga clic en el icono de configuración en el menú a la izquierda, y haga clic en Carrer Quoting Setup.

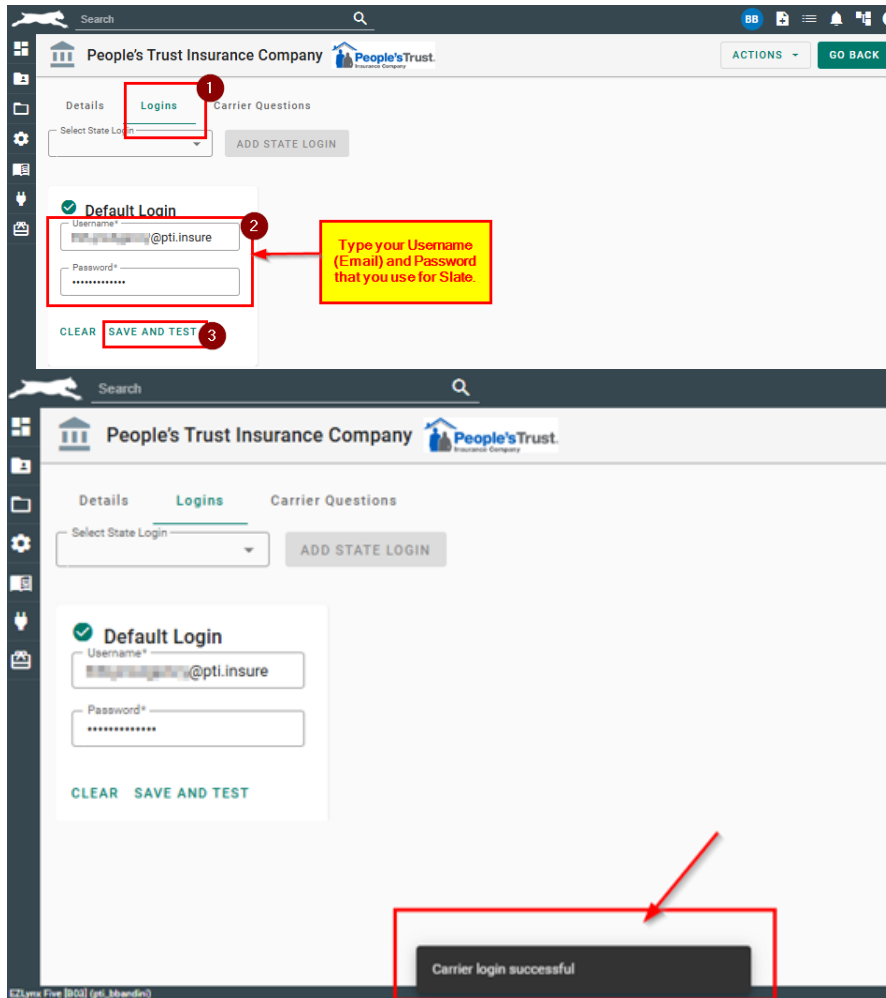


2. Busque People’s Trust en Manage Carriers y haga clic en View Details.



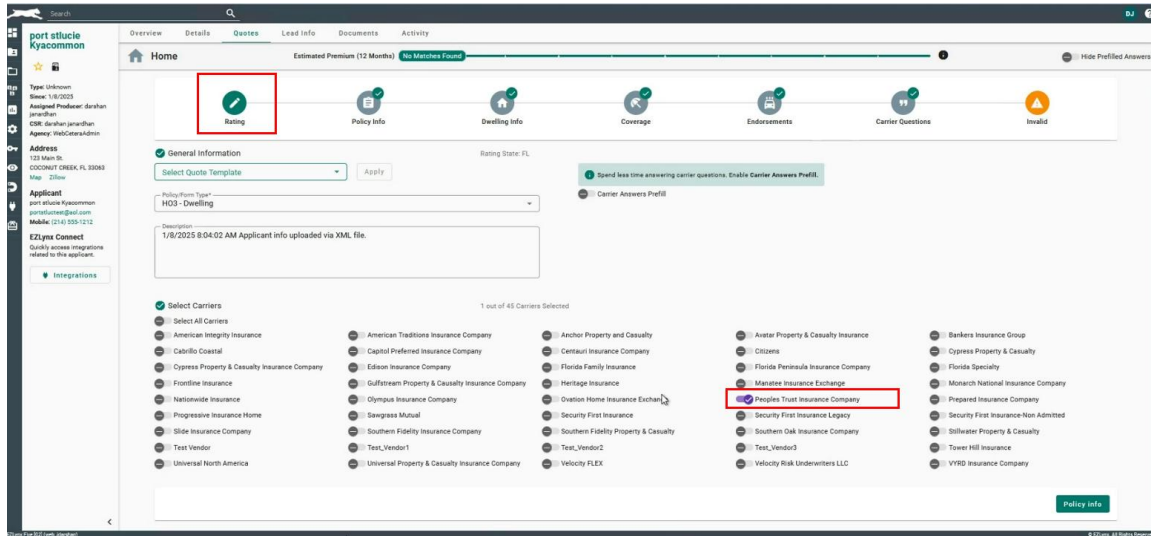
3. Haga clic en el menú de Logins en la parte superior de la pantalla.
 - a. Debajo de Default Login, escriba su nombre de usuario (correo electrónico) y contraseña que usted usa para Slate.
 - b. Haga clic en Save and Test.
 - c. Debe ver una pantalla emergente en la parte inferior de la pantalla que indica “Carrier login successful”.
 - i. Si no ves esta pantalla emergente, revise sus credenciales de Slate e intente otra vez.





4. Una vez que esté en el menú de cotizaciones, vaya a la pestaña de calificación y asegúrese que People's Trust Insurance Company esté activado en Select Carriers.

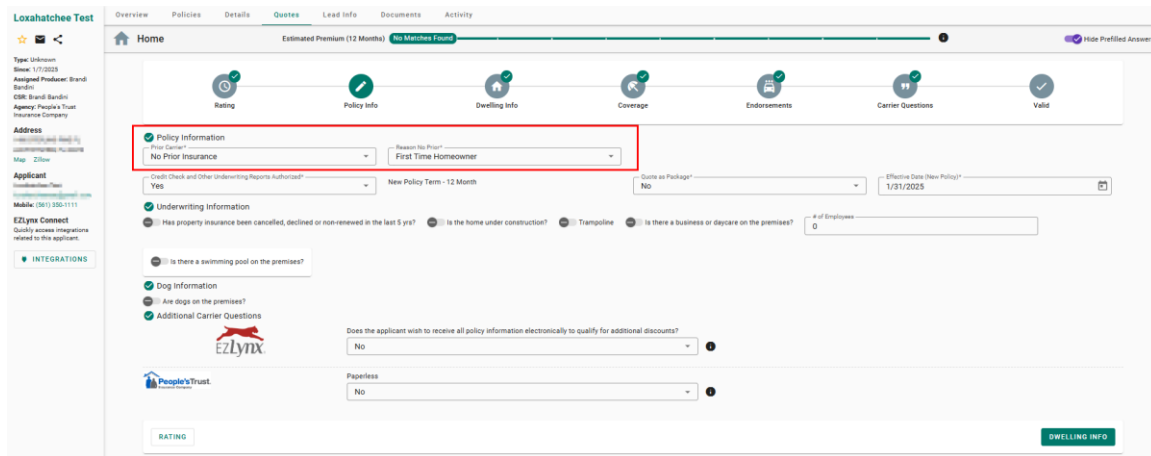




Consejos de Cotización

1. Nueva Compra

- a. En la pestaña de Policy Info, vaya a los campos de Policy Information.
 - i. Debajo del menú desplegable de Prior Carrier, seleccione No Prior Insurance.
 - ii. Debajo del menú desplegable de Reason No Prior, seleccione First Time Homeowner.



2. Créditos de Wind Mitigation

- a. Para casas con año de construcción < 2002, debe marcar la casilla de Inspection Done y añadir fecha de inspección. Así se asegura que cualquier créditos de mitigación del viento se apliquen a la cotización en Slate.
 - i. Si no tiene una inspección de mitigación del viento, no marque la casilla de Inspection Done.
- b. Para casas con año de construcción > 2001, créditos de mitigación del viento serán automáticamente aplicadas en Slate aún si la casilla de Inspection Done no ha sido marcada.

The image displays two screenshots of the Slate software interface, specifically the 'Dwelling Info' tab. The top screenshot shows the 'Wind Mitigation' section with the 'Inspection Done' checkbox checked and the 'Inspection Date' set to 1/24/2025. A yellow callout box highlights this section with the text: 'For Wind Mitigation credits to bridge to Slate as entered, Inspection Done must be checked and an Inspection Date entered.' The bottom screenshot shows the same section but with the 'Inspection Done' checkbox unchecked. A yellow callout box points to this checkbox with the text: 'Wind Mitigation Credits will NOT bridge to Slate, since Inspection Done is not checked.'

3. Cobertura

- a. Vivienda
 - i. Si la cantidad de vivienda es menos del costo de reposición en Slate, la cantidad de vivienda será aumentada en Slate al monto mínimo del costo de reposición.
- b. Propiedad Personal
 - i. Si el campo de Propiedad Personal se deja en blanco, será predeterminado a \$0 y Propiedad Personal será excluida de la cotización de Slate.



Rating

Policy Info

Dwelling Info

Coverage

Endorsements

Carrier Questions

Valid

Coverage Information

General Coverages

| | | |
|--------------------------------|-------------------------------------|---|
| Dwelling* \$540,000 | Est. Replacement Cost* \$540,000 | Personal Property (default) \$10,000 |
| Loss Of Use (default) \$0 | Personal Liability* 1000000 | Medical Payments* 5000 |
| All Perils Deductible* 1000 | Theft Deductible | Wind Deductible |
| Hurricane Deductible* 2% | | |

If left blank, will default to \$0

4. Asegúrese de verificar todas las entradas en Slate antes de vincular la cobertura.

