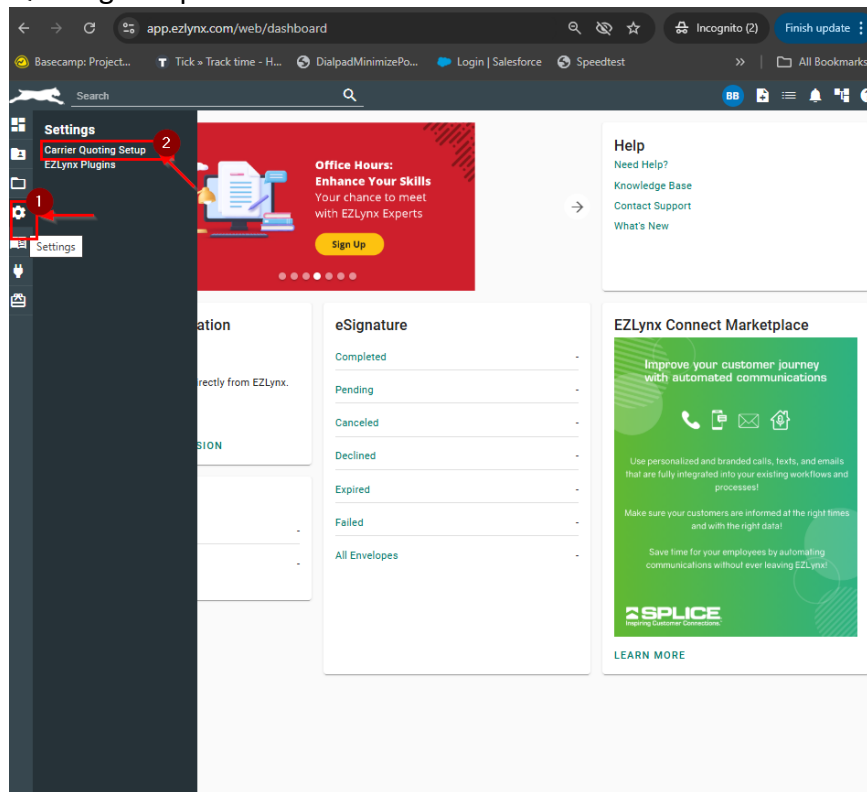


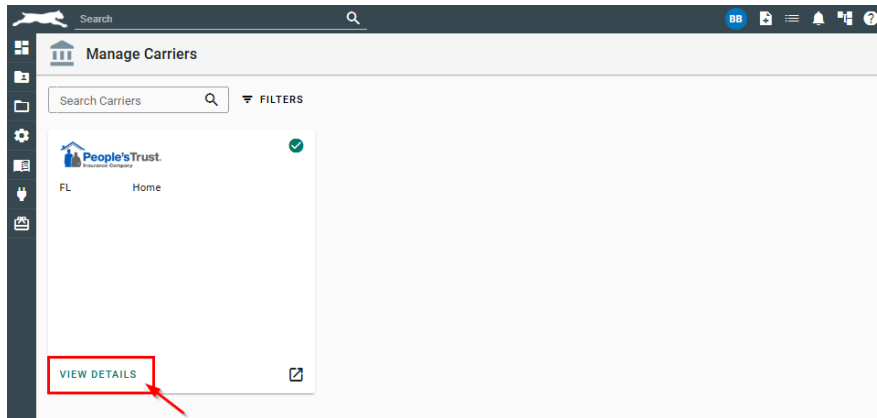
## EZ Lynx – People's Trust Insurance Set Up & Tips

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

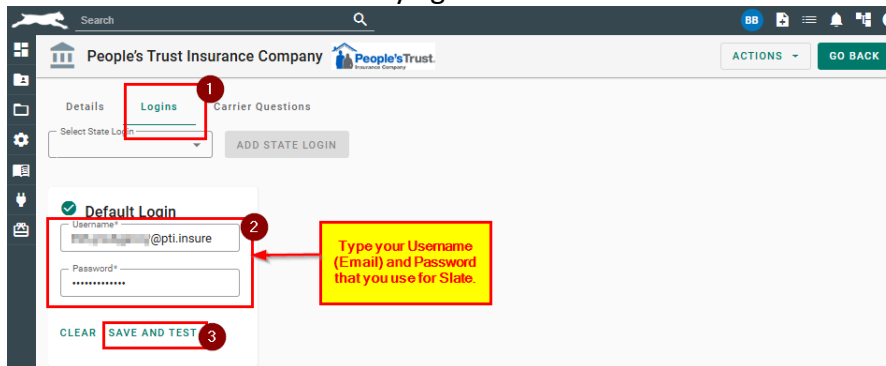
1. In EZLynx, click on the settings icon in the menu to the left, then click on Carrier Quoting Setup.

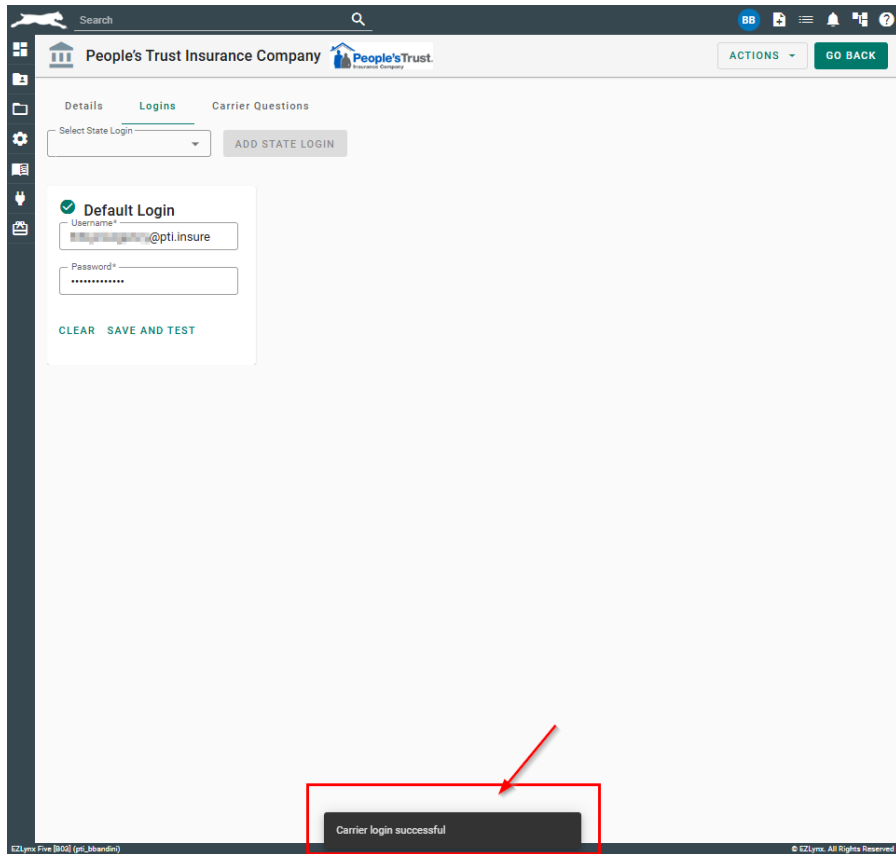


2. Find People's Trust under Manage Carriers and click on View Details.

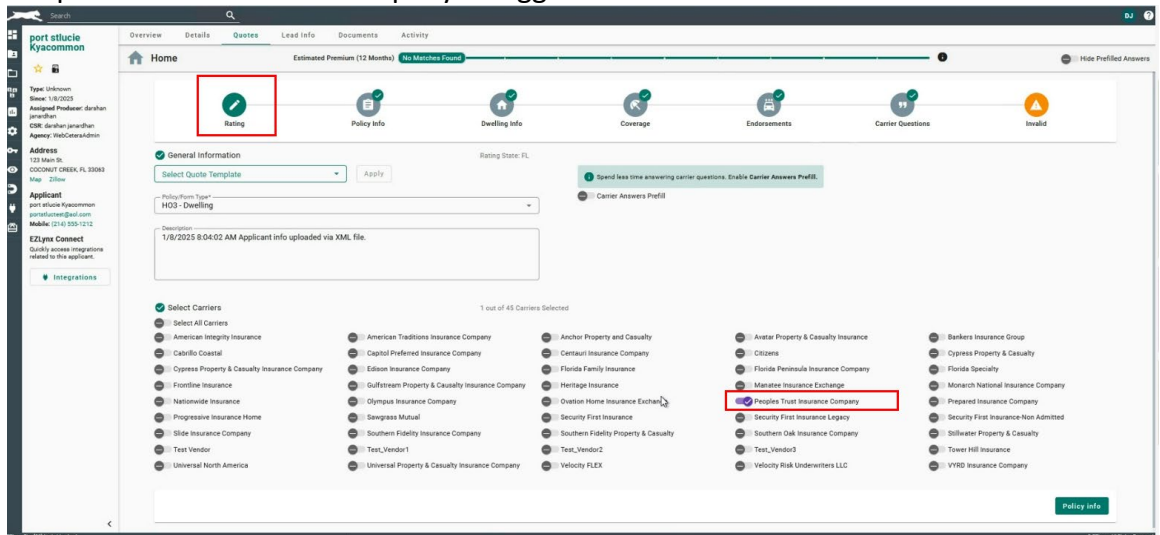


3. Click on the Logins tab at the top of the screen.
  - a. Under Default Login type in your Username (Email) and Password that you use for Slate.
  - b. Click on Save and Test.
  - c. You should see a pop-up at the bottom of the screen that states "Carrier login successful".
    - i. If you do not see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





- 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

www.PTI.insure • 561-235-7004  
18 People's Trust Way, Deerfield Beach FL 33441



## 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.

The screenshot displays the 'Loxahatchee Test' application interface. The main navigation bar includes 'Overview', 'Policies', 'Details', 'Quotes', 'Lead Info', 'Documents', and 'Activity'. The 'Home' tab is active, showing an 'Estimated Premium (12 Months)' of 'No Matches Found'. A progress bar at the top indicates the current step is 'Policy Info'. The 'Policy Information' section is highlighted with a red box and contains the following fields:

- Prior Carrier:** No Prior Insurance
- Reason No Prior:** First Time Homeowner
- Credit Check and Other Underwriting Reports Authorized:** Yes
- New Policy Term:** 12 Month
- Quote as Package:** No
- Effective Date (New Policy):** 1/31/2025

Below these fields, there are several checkboxes and dropdown menus for underwriting information, including 'Has property insurance been cancelled, declined or non-renewed in the last 5 yrs?', 'Is the home under construction?', 'Trampoline', 'Is there a business or daycare on the premises?', 'Is there a swimming pool on the premises?', 'Dog Information', 'Are dogs on the premises?', and 'Additional Carrier Questions'. There are also logos for 'EZlynx' and 'People's Trust'.

## 2. Wind Mitigation Credits

- a. For homes with a Year Built < 2002, you must go to the Inspection Done field under Carrier Questions and select Yes in order for any Wind Mitigation Credits entered to apply to the quote in Slate.
  - i. If you do not have a wind mitigation inspection, then select No for Inspection Done.
- b. For homes with a Year Built > 2001, wind mitigation credits will be automatically applied in Slate even if No is selected for Inspection Done.



**Loxahatchee Test**

Overview Policies Details **Quotes** Lead Info Documents Activity

**Home** No Matches Found Hide Prefilled Answers

Year Updated\* 2000 Plumbing Update\* Not Updated Year Updated\* 2000  
 Roofing Update\* Not Updated Year Updated\* 2000

**Wind Mitigation**

Inspection Date\* 1/1/2022 Terrain\* Terrain B Roof Covering\* FBC Equivalent  
 Roof Deck Attachment\* C. 8d @ 6/6 Roof To Wall Attachment\* Double Wraps Secondary Water Resistance (SWR)\* SWR  
 Opening Protection\* Basic Wind Speed\* Not Applicable Wind Design\* Not Applicable

**Credits info**

Multipolicy Discount  Non Smoker  Retirees Credit   
 Mature Discount  Retirement Community  Visible To Neighbor   
 Manned Security  Limited Access Community  Gated Community

**Carrier Questions**

**People's Trust** \* Inspection Done  
 Yes

**Loss Information**

**ADD LOSS**

**Additional Carrier Questions**

**EZLynx** Limited Carport(s), Pool Cage(s) and Screen Enclosure(s)  
 None

**POLICY INFO** **COVERAGE**

### 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.



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

Personal Property (default)  
\$10,000

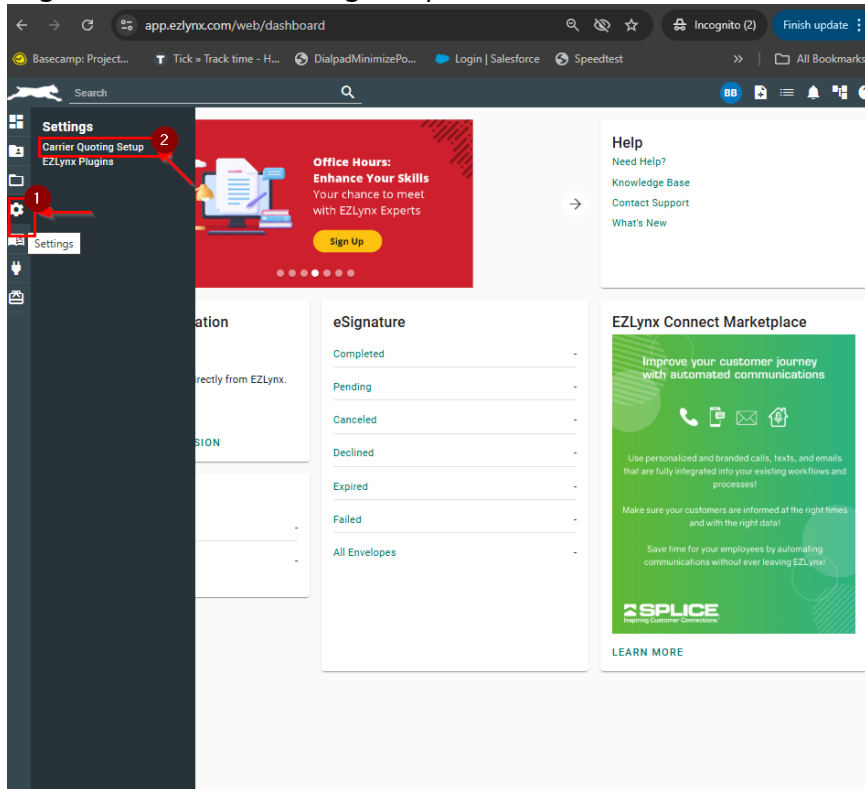
4. Make sure to verify all entries in Slate before coverage is bound.



## EZ Lynx – People’s Trust Insurance Configuración & Consejos

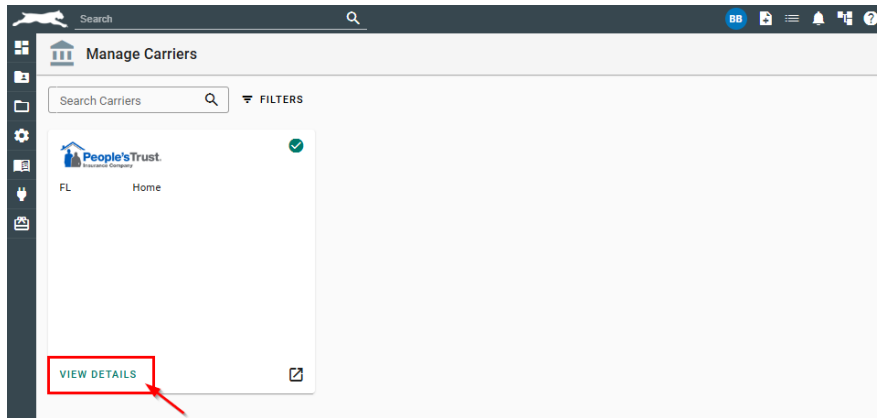
Como añadir a People's Trust como compañía:

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

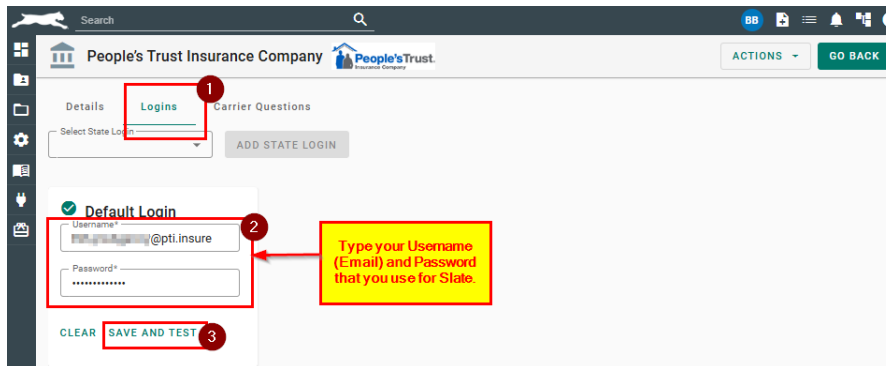


2. Busque People’s Trust en Manage Carriers y haga clic en View Details.

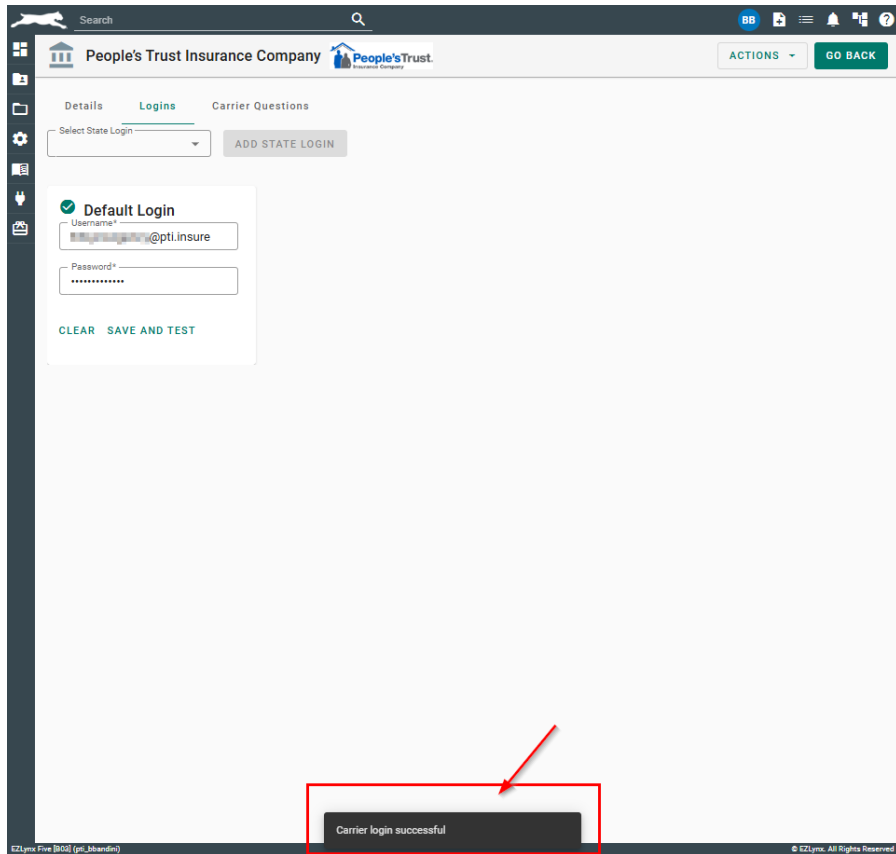




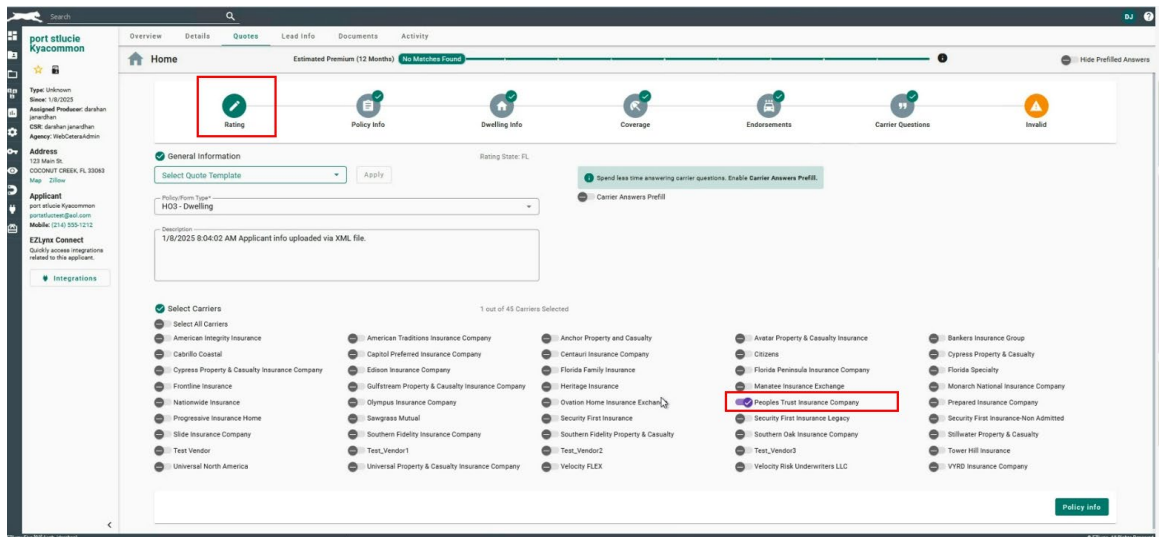
3. Haga clic en el menú de Logins en la parte superior de la pantalla.
  - a. Debajo de Default Login, escriba su nombre de usuario (correo electrónico) y contraseña que usted usa para Slate.
  - b. Haga clic en Save and Test.
  - c. Debe ver una pantalla emergente en la parte inferior de la pantalla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







- 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.

The screenshot displays the 'Policy Info' tab in the Loxahatchee Test system. The 'Policy Information' section is highlighted with a red box. It contains two dropdown menus: 'Prior Carrier' with 'No Prior Insurance' selected, and 'Reason No Prior' with 'First Time Homeowner' selected. Other visible fields include 'Credit Check and Other Underwriting Review Authorized?' (Yes), 'New Policy Term - 12 Month', 'Quote as Package?' (No), and 'Effective Date (New Policy)' (1/31/2025). The 'Underwriting Information' section includes questions about property insurance, home construction, trampolines, and businesses on the premises. The 'Dog Information' section asks if there are dogs on the premises. The 'Additional Carrier Questions' section includes a question about electronic policy information and a 'Paperless' checkbox. The 'RATING' section is partially visible at the bottom.

### 2. Créditos de Wind Mitigation

- a. Para casas con año de construcción < 2002, debe ir al campo de Inspection Done, debajo de Carrier Questions, y seleccione Yes. 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, seleccione No en el campo de Inspection Done.
- b. Para casas con año de construcción > 2001, créditos de mitigación del viento serán automáticamente aplicadas en Slate aún si No ha sido seleccionado en el campo de Inspection Done.



**Loxahatchee Test**

Overview Policies Details **Quotes** Lead Info Documents Activity

Home No Matches Found Hide Prefilled Answers

Year Updated\* 2000 Plumbing Update\* Not Updated Year Updated\* 2000

Roofing Update\* Not Updated Year Updated\* 2000

**Wind Mitigation**

Inspection Date\* 1/1/2022 Terrain\* Terrain B Roof Covering\* FBC Equivalent


Roof Deck Attachment\* C. 8d @ 6/6 Roof To Wall Attachment\* Double Wraps Secondary Water Resistance (SWR)\* SWR

Opening Protection\* Basic Wind Speed\* Not Applicable Wind Design\* Not Applicable

**Credits info**

Multipolicy Discount  Non Smoker  Retirees Credit  
 Mature Discount  Retirement Community  Visible To Neighbor  
 Manned Security  Limited Access Community  Gated Community


**Carrier Questions**

 \* Inspection Done

**Loss Information**

**ADD LOSS**

**Additional Carrier Questions**

 Limited Carport(s), Pool Cage(s) and Screen Enclosure(s)

**POLICY INFO** **COVERAGE**

### 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.

