



FRONTLINE INSURANCE PORTAL USER GUIDE

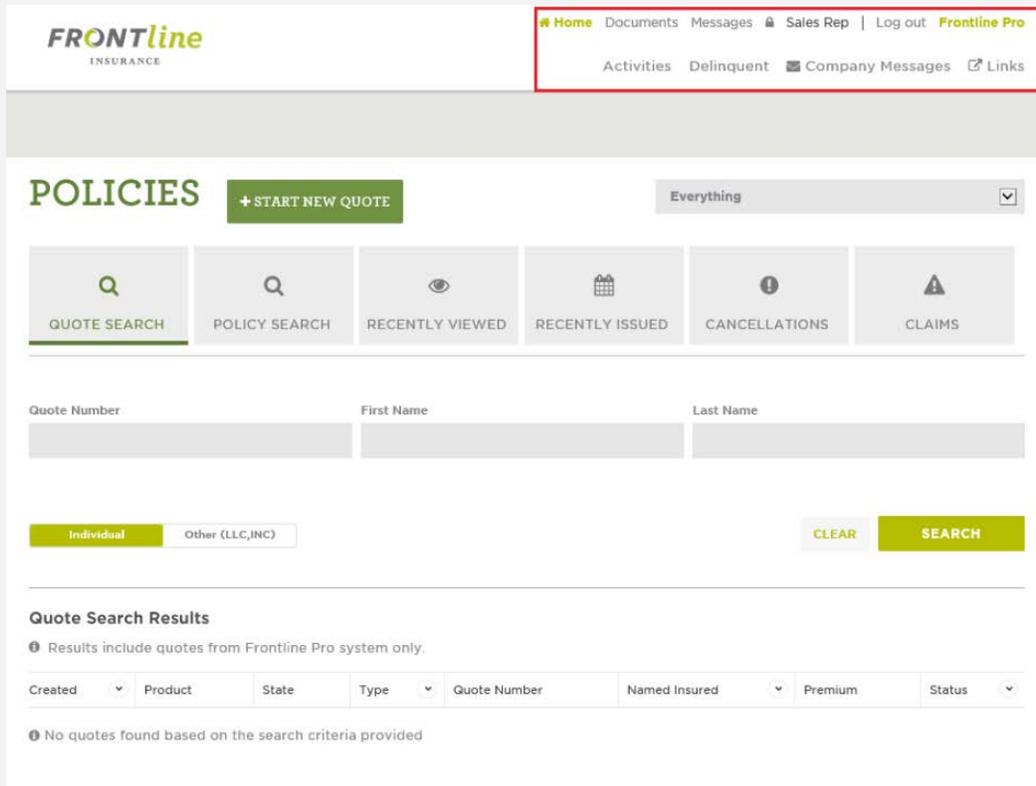
Spring 2021, Version 3.0

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INTRODUCTION TO FRONTLINE PRO:

Welcome to Frontline Pro! This section will advise you on the features of the Frontline Pro home page. Let's take a quick tour of the home page to review the features, links and pertinent information.



On the top right of the home page you will find the tool bar. This is an important section because it contains links that you will frequently access:

- **Documents:** This is the link for the Document Library. When you select the “Documents” link, you will be directed to the page that contains state specific agency memos, company specific coverage forms, and resources including the most updated quick reference guides
- **Activities:** This link will appear “red” if you have any new activities to be worked by your agency. There is an entire section devoted to Activities at the end of this User Guide,
- **Delinquent:** This link will appear “red” if you have any policies that are delinquent in payment.
- **Company Messages:** We post Company Messages to advise you of system maintenance, or changes in guidelines or any technical issues. Upon logging into the portal, you will see any new company messages that must be acknowledged. The “message” link archives these messages for your reference.
- **Links:** If you are signed up for Flood through Torrent, this link will direct you to the agency flood portal

AGENCY DASHBOARD:

Further down your home page you will see the agency dashboard. In this section you will learn about the key functionality of each tile on the agency dashboard.

Agency Dashboard:

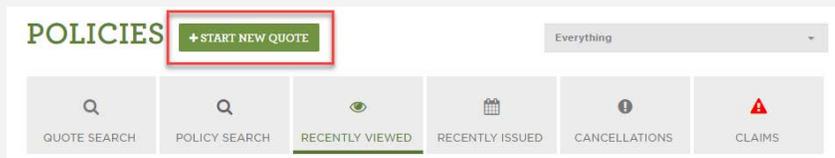
The screenshot displays the Frontline Insurance Agency Dashboard. At the top, the logo 'FRONTline INSURANCE' is on the left, and navigation links for 'Home', 'Documents', 'Messages', 'Sales Rep', and 'Log out Frontline Pro' are on the right. Below this, there are links for 'Activities', 'Delinquent', 'Company Messages', and 'Links'. The main section is titled 'POLICIES' and includes a '+ START NEW QUOTE' button and a filter dropdown set to 'Everything'. A row of six navigation tiles is highlighted with a red box: 'QUOTE SEARCH' (with a magnifying glass icon), 'POLICY SEARCH' (with a magnifying glass icon), 'RECENTLY VIEWED' (with an eye icon), 'RECENTLY ISSUED' (with a calendar icon), 'CANCELLATIONS' (with an information icon), and 'CLAIMS' (with a warning triangle icon). Below the tiles are three input fields for 'Quote Number', 'First Name', and 'Last Name'. There are also radio buttons for 'Individual' and 'Other (LLC,INC)', and 'CLEAR' and 'SEARCH' buttons. The 'Quote Search Results' section shows a message: 'Results include quotes from Frontline Pro system only.' and a table with columns: 'Created', 'Product', 'State', 'Type', 'Quote Number', 'Named Insured', 'Premium', and 'Status'. A message at the bottom states: 'No quotes found based on the search criteria provided.'

- **+ Start New Quote:** Click this button to start a new submission
- **Quote Search:** Look up a quote by Quote Number, First Name or Last Name
- **Policy Search:** Look up a policy by Policy Number, First Name or Last Name
- **Recently Viewed:** Click on the radio button to view recently viewed quotes or policies
- **Recently Issued:** Select this tile to view recently issued policies
- **Cancellations:** Select this tile to view pending cancellations, cancelled policies are all the above.
- **Claims:** Select this tile to view recently created claims, open claims, and closed claims. The exclamation point on the tile will show “red” when there is a new claim for your agency.

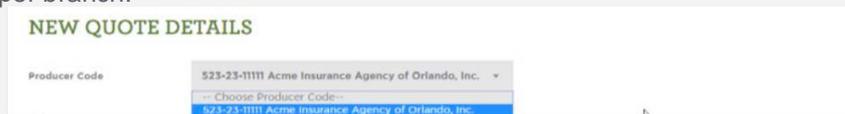
QUICK START GUIDE:

QUOTE & BIND POLICY:

1. Log-in to your Frontline
2. Select the + Start New Quote Button



3. Producer Codes: You are now on the New Quote Details Page. The second field you come to is the Producer Code. This can be your current branch location or a different branch location within your organization. Your producer code will easily allow policies and commissions to be associated with the proper branch.



4. Risk States: Risk States are associated with the selected producer code and will appear in the drop-down list. Select the applicable State in which are you placing your new business. If you do not see the Risk State, check your producer code to ensure it is correct.
5. Policy Type: Select an appropriate policy type on which you would like to receive a quote. Note, you will only have access to policies available to the Risk State you chose.
6. New Quote Details: Complete the required fields including the name insured information, location address, Insurance score default (if applicable) and number of losses on any property.
7. Home Details: Select Policy Writer, which is the agent of record for this quote. If you do not see your name listed as a policy writer, please contact agencyrequest@flhi.com. When selecting the MSB button, you will notice a new web page will open. Once you have verified that the information is accurate, select finish, then Save, and then close this additional browser window to return to Frontline Pro. IMPORTANT: Without hitting Retrieve RCE, the replacement cost value will not appear in your quote. Once RCE is retrieved, complete the rest of the required fields notated by the red asterisk.

QUICK START GUIDE:

Home Details

Policy Writer: Choose Policy Writer [v]

• Year Built: 2004

• Construction Type: Frame [v]

• Distance to Fire Hydrant: Within 100ft Over 100ft

• Protection Class: 3 [v]

• Territory Code: 3B [v]

• BCEG: 06 [v]

• At the inception of this policy, will this property be deeded in the name of a corporation, business, LLC or any other entity? Yes No

• Residence Type: 1 Family Residence [v]

• Usage Type?: Primary [v]

• How is dwelling occupied?: Owner Occupied [v]

• Units in Fire Walls: 1 [v]

8. Wind Mitigation Info: Enter in Roof information and opening protection if required.
9. Dwelling Protection & Discounts: Select the appropriate discounts that apply to the quote.
10. Coverages: Now, continue with your quote by providing the necessary information in the editable fields or by selecting information from the corresponding drop-down boxes. Once your policy has been quoted you can compare a different quote by selecting customize. Here you will be able to see a Side-by-Side comparison. Select the quote and proceed by clicking "Continue to Application". You can also withdraw the quote to go back to the home page.

Coverages

Custom 1 Custom 2

11. Once the quote is finalized, select continue to Application.

APPLICATION/BIND:

HOW TO COMPLETE APPLICATION & BIND

This page will introduce you to the application process, binding of the policy, as well as printing and uploading Trailing Documents (If Required). On the previous page, you finished your Quote and selected Coverages for your client. Now, you will need to continue to the application before binding the policy.

Search for existing accounts: A screen will pop up asking you to enter the policyholder's name or policy number to search for existing accounts within the system. If no accounts are found, select continue with new account.

Complete the Application

The application consists of multiple sections which you can access by selecting the appropriate tab which will expand to complete. Complete the application fields by either entering information in the editable fields or by selecting information from the corresponding drop-down lists.

FEATURES

COMPLETE APPLICATION QUICKLY

Move through the application quickly using dropdowns and editable fields

PRINT DECLARATIONS PAGE

Immediately print the Dec page for your recently bound policy

UPLOAD TRAILING DOCUMENTS

Easily upload the necessary documents required by underwriting.

RESOURCES

PORTAL TRAINING HELP:
407-444-0481

The screenshot displays the application interface. On the left is a sidebar with a 'NEW QUOTE' header and a menu icon. Below the header, it shows 'FLORIDA HO6 - APPLICATION' and details for the primary named insured: 'test condo', quote number '0012975305', and 'TOTAL COST'. The sidebar contains several green buttons: 'RATE / SAVE', 'QUICK SAVE', '+ ACTIVITY', 'ORDER REPORTS', 'Required Fields (1)', and 'PRINT DOCUMENTS'. The main content area is titled 'Search for Existing Accounts' and contains a 'Qualification' section with seven questions, each with 'Yes' and 'No' radio buttons. The questions are: 1. 'Is there any knob & tube or single-strand aluminum wiring in the home?' 2. 'Is the Electrical Panel Zinsco, Federal Pacific, Sylvania or Challenger?' 3. 'Is the home vacant?' 4. 'Is the risk under construction or major renovations?' 5. 'Is the home constructed using EIFS/Dryvit stucco?' 6. 'Have there been 2 or more non-Act of God losses in the past 5 years at this location or for the applicant?' 7. 'Is there any Polybutylene Plumbing?' 8. 'Are there any unrepaired damages or known deficiencies?'. Below the qualification section are two more sections: 'Policy, Applicant & Location Info' and 'Home Details'.

APPLICATION/BIND:

After answering all the application questions, you can order reports. Please note that it is important to review the loss history page and enter in all non-cat losses into the loss history section. If there are no underwriting issues you can continue with binding your policy.

FEATURES

PRINT INVOICES
You can now print invoices for current premium due.

RESOURCES
PORTAL TRAINING HELP:
407-444-0481

Loss History

Aggregate Number of Non Act of God Losses 0

NAME	DATE MODIFIED ▼
 2020-12-29T03:05:16_PriorLossReport	12/29/20

[ADD](#) [REMOVE](#) [EDIT](#)

Prior losses, (if any) must be manually entered.

APPLICATION/BIND:

After binding, you will arrive at the Bind Confirmation page. This is where you will be able to upload trailing documents for your newly bound policy, make a payment and print other important documents.

Important note: If your policy has stepdown, please wait 30 – 60 seconds to access and print the invoices to ensure both the Homeowner's and Stepdown policies are listed.

Bind Confirmation
POLICY NUMBER: 9403033721

Thank you! Your policy is successfully bound.

Effective Date: November 4, 2020
Total Cost: \$1,071.25
Payment Plan: Full Pay

▲ IMPORTANT [VIEW POLICY DETAILS](#) [PREVIEW INVOICE](#)

[MAKE A PAYMENT](#)

Print Full Policy Contract As Of:

[PRINT FULL POLICY CONTRACT](#)

Trailing Documents >

Trailing Documents are required to be kept on file within your agency. The following forms are required to be uploaded for review by underwriting if applicable: Consent to Rate, Wind Rejection, Sinkhole Rejection/Selection & Paperless Consent

APPLICATION-SIGNED	RCE/APPRaisal
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Other Documents >

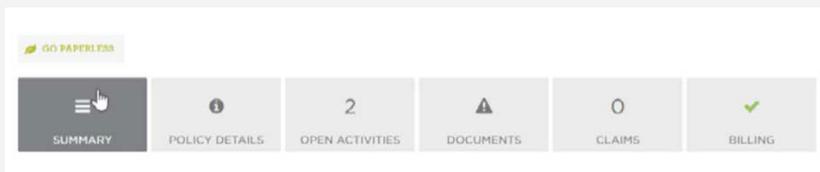
Print Documents >

Stepdown Deductible Documents >

POLICY SERVICE:

HOW TO: NAVIGATE POLICY SERVICE PAGE

There are a lot of great features in Frontline Pro, and many are contained right here, on the Policy Service Dashboard. The Policy Service Dashboard will be your main page when assisting and servicing your client's needs. You will have all the tools to provide exceptional service and to interact with Frontline. Next, we will discuss the "Tiles" shown at the top of the page and discuss some of the features contained in each.



QUICK ACCESS TO:

- Summary Tile
- Policy Details Tile
- Activities Tile
- Documents Tile
- Claims Tile
- Billing Tile

SUMMARY TILE

In the Summary tile, you will see a high-level overview of your client's policy information, including policy inception, cancellation information (if applicable), producer information, and premium associated with the policy. Additionally, at the bottom of the page you will see "Policy Transactions" where you can select the associated hyper-links to find out additional information pertaining to the transaction(s). There are also buttons which allow quick access to common policy transactions such as Change Policy, Cancel Policy, New/Update RCE, Make A Payment, and File a Claim.

POLICY SERVICE:

POLICY DETAILS TILE:

The next tile is the Policy Details page. This page will show the current and past versions of the policy, and the details within the policy. You can edit areas of the policy, including Mailing address, Primary phone number, and Primary email. You can also enroll your client in our Electronic Document Delivery Program and get a detail snapshot of your client's policy with a click of a button.

The screenshot shows a web interface for policy management. At the top left, there is a 'GO ELECTRONIC' button with a leaf icon. Below this is a navigation bar with six tabs: 'SUMMARY' (with a hamburger menu icon), 'POLICY DETAILS' (with an information icon and highlighted in dark grey), 'ACTIVITIES' (with a zero icon), 'DOCUMENTS' (with a warning triangle icon), 'CLAIMS' (with a '2' icon), and 'BILLING' (with a document icon). The main content area is titled 'Policy Transactions >' and features a prominent green banner for a 'CHANGE EFFECTIVE - 4/21/20 - ADDITIONAL INSURED/INTEREST CHANGE' with a plus icon. Below the banner, a grey box contains the following text: 'This period will become effective on 4/21/20', 'Policy Term: 3/19/20 - 3/19/21', 'Total Annual Premium & Fees: \$5,106.00', and 'Transaction Date: 4/21/20'. The page also includes several expandable sections: 'Policyholder Info >', 'Mortgage & Additional Interest Information >', 'Discounts >', 'Coverages >', 'Claims >', and 'Policy Snapshot >'.

POLICY SERVICE:

ACTIVITIES TILE:

The Activities section will be your direct communication line to Frontline's underwriting department. Here you can create, edit, and complete your Activities. You also can upload documents! Activities will be a huge part of your interaction with Frontline. Further discussion on managing Activities can be found on page 19.

FLORIDA HO3 (9403033721)
TEST TESTHOME
GO ELECTRONIC

HOME CHECKUP
PENDING

SUMMARY POLICY DETAILS **ACTIVITIES** DOCUMENTS CLAIMS BILLING

Activities & Notes

+ ACTIVITY All Open Search activities

Add Activity

Type Please select activity type

Related Documents + Document

Note

Topic -- note topic --

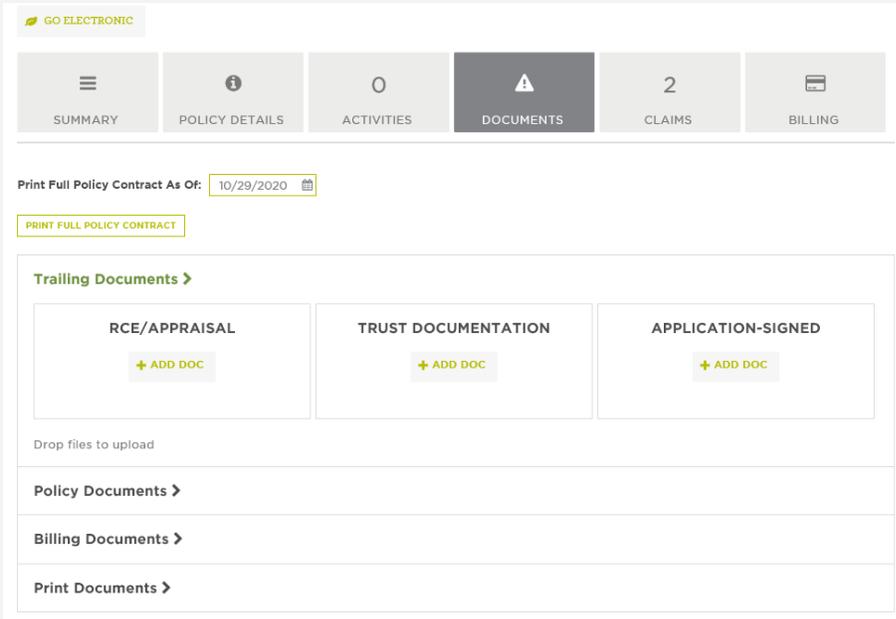
Note

CANCEL ADD

POLICY SERVICE:

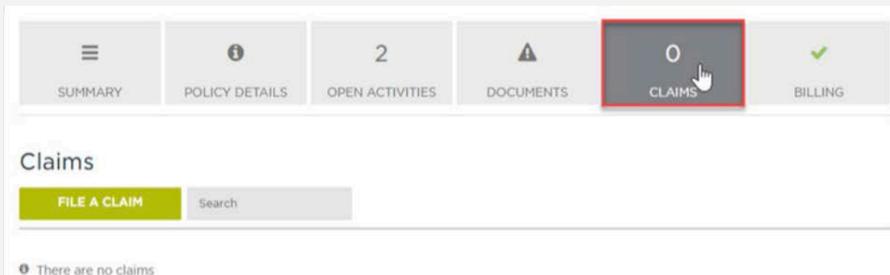
DOCUMENTS TILE:

The Documents tile shows you all the current documents and allows you to upload any outstanding (such as Trailing documents if applicable) documents associated with the policy. You can easily find and print copies as you need throughout the life of the policy.



CLAIMS TILE:

The Claims Tile offers features such as filing a claim, searching for a claim, viewing current/past claim details, and printing and uploading documents. This will allow you to assist your client in responding quickly and effectively during your client's time of need.



POLICY SERVICE:

BILLING TILE:

The Billing Tile will allow you to make a payment, view your payment schedule, and view payment history. You also can edit the payment plan and Payor of the policy.

SUMMARY POLICY DETAILS ACTIVITIES DOCUMENTS CLAIMS **BILLING**

POLICY PERIOD	03/19/2020 - 03/19/2021	
PAYMENT PLAN	FULL PAY	EDIT
BILL TO	WELLS FARGO	EDIT
REMAINING BALANCE ON CURRENT TERM	\$0.00	

Payment Schedule >

***Amounts shown below do not include any applicable invoice fees or NSF charges.*

BILL DATE	DUE DATE	AMOUNT DUE
No payment information available.		

Payment History >

Disbursement History >

TOTAL DUE **\$0.00**

[MAKE A PAYMENT](#) **0**

WORKING WITHIN YOUR POLICY:

WORK WITH DOCUMENTS:

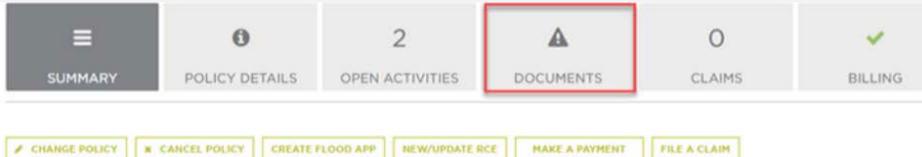
The “Policy Documents” section will show you how to quickly locate, print, and/or upload documents associated with your client’s policy.

Locate your policy:

Start by logging-in to your Frontline account. Once logged in, you will arrive at the Policy Dashboard where you can choose your policy. If you recently issued or viewed the policy, you can simply select “Recently Issued” or “Recently Viewed” and select the associated “Policy Number” hyper-link. Otherwise, select the “Policy Search” button and enter the policy number you wish to view, then click “Search.”

Policy Summary page:

Once your policy has been located, select the hyper-link under “Policy Number” to view the policy Summary. You have now arrived at the Policy Summary page.



FEATURES

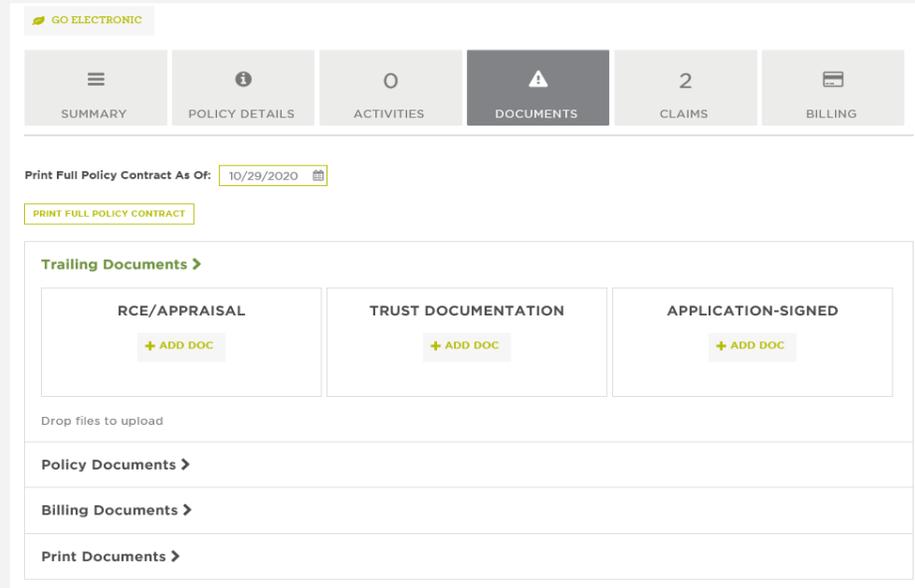
PRINT POLICY DOCUMENTS
EASILY AND AT YOUR
CONVENIENCE
Including newly bound
Declarations page!

RESOURCES
PORTAL TRAINING HELP:
407-444-0481

WORKING WITHIN YOUR POLICY:

DOCUMENTS TILE:

Click on the Documents tile. You will see this section expand, and a list of all associated documents, in PDF format, will be shown. To view the document, simply click on the hyper link and the document will open in a new browser window.



UPLOADING DOCUMENTS:

You will have the ability to upload documents at various times in Frontline Pro including, but not limited to; Bind Confirmation screen (which immediately follows selecting "Bind" in the application), Trailing Documents tab (In the Documents tile), Policy Documents (In the Documents tile), and in the Claims Documents tab.

You can upload documents by either selecting the "+ ADD DOC" button or the "Select Documents to Upload." You will be prompted to select a document to upload, and once selected, simply click "Upload" and your documents will be uploaded to Frontline's system.



POLICY CHANGE:

HOW-TO CREATE A POLICY CHANGE:

Start by logging-in to your Frontline account. Once you have located the policy you wish to work with select the hyper-link under “Policy Number” to view the policy Summary.



SELECT CHANGE POLICY:

Click on the button “change policy” to process an endorsement on the policy.

The screenshot shows the policy summary page. At the top is a navigation bar with tabs: SUMMARY, POLICY DETAILS, ACTIVITIES, DOCUMENTS, CLAIMS, and BILLING. Below the navigation bar is a row of action buttons: CHANGE POLICY (highlighted with a red box), CANCEL POLICY, NEW/UPDATE BEE, MORE POLICIES FOR THIS INSURED, MAKE A PAYMENT, and FILE A CLAIM. The main content area displays policy details: POLICY INCEPTION: March 5, 2020; POLICY EXPIRATION: March 5, 2021; POLICY STATUS: In Force; PRODUCER OF RECORD: Acme Insurance Agency (523-23-11111); PRODUCER OF SERVICE: Acme Insurance Agency (523-23-11111). To the right, a summary box shows: TOTAL PREMIUM \$1,870.00; STEPDOWN DEDUCTIBLE \$89.34; TAXES, SURCHARGES AND FEES \$27.00; and TOTAL ANNUAL PREMIUM & FEES \$1,986.34. Below this is a 'Policy Transactions' section with a table of transactions.

JOB NUMBER	TRANSACTION STATUS	TYPE	PERIOD STATUS	PREMIUM	EFFECTIVE DATE	REASON
025995044	Bound	Submission	In Force	\$1,897.00	3/5/20	
0273998581	Bound	Policy Change	In Force	\$0.00	3/6/20	Additional Insured/Interest Change
0274334905	Bound	Policy Change	In Force	\$0.00	3/6/20	Additional Insured/Interest Change
0006849138	Bound	Renewal	Scheduled	\$2,394.00	3/5/21	

CHOOSE AN EFFECTIVE DATE:

Enter the effective date and the endorsement type. Note: You will not be able to select a date prior to today's date.

The screenshot shows the 'CHANGE POLICY' form. The 'Effective Date' field is set to 02/23/2021. The 'Endorsement Type' dropdown menu is open, showing a list of options: Select, Additional Insured/Interest Change, Amend Alarm Credits, Amend Coverage, Amend Deductible, Amend Named Insured, Amend Occupancy, Amend Wind Mit Credits, Mailing Address Change, Mortgage Change, and Other. The 'Additional Insured/Interest Change' option is highlighted in blue. At the bottom of the form, there are links for 'Terms & Conditions', 'Feedback', and 'Agent Reso', and a footer that reads 'ne Insurance All Rights Reserved. Build Time: 0'.

POLICY CHANGE:

ENDORISING A POLICY:

Completing an endorsement to your client's policy is easy to complete within the agency portal. You can change coverages, Additional Interests, Discounts/Surcharges, Occupancy, Mitigation details, and Applicant Contact information. Once your changes are complete, simply click Rate/Save to recalculate the rate and click the Bind button to proceed or you can also withdraw change.

FEATURES

FULL ACCESS TO NUMEROUS AREAS OF THE POLICY!

Changes can be made to:

- Coverages
- Additional Interests
- Discounts/Surcharges
- Occupancy
- Mitigation details
- Applicant Contact information

RESOURCES

PORTAL TRAINING HELP:
407-444-0481

POLICY CHANGE

FLORIDA HO3 - POLICY CHANGE

COMPANY NAME
POLICY NUMBER
9403033721

CURRENT TOTAL COST
\$1,071.25

NEW TOTAL COST
\$1,039.25

CURRENT TERM:
11/4/20 - 11/4/21

CHANGE EFFECTIVE DATE:
12/29/20

RATE / SAVE

BIND POLICY CHANGE

PRINT DOCUMENTS

WITHDRAW CHANGE

Coverages & Premium

Current \$1,071.25	Amended \$1,039.25
------------------------------	------------------------------

COVERAGES

Dwelling LIMIT

250,000

Other Structures PERCENTAGE LIMIT

2%

Personal Property EXCLUDED? LIMIT

No

VALUATION METHOD

Replacement Cost Value

Loss Of Use SELECTION LIMIT

11%

Section I Deductibles WIND EXCLUDED? ALL OTHER PERILS

No

HURRICANE

2%

Personal Liability LIMIT

300,000

Medical Payments LIMIT

3,000

NOTE: If your changes trigger an Underwriting Issue, a pop-up window will appear with a brief description. Select "Submit to Underwriter," and you will be directed to the Policy Change Summary page.

ACTIVITIES:

WHAT ARE ACTIVITIES?

The Activities section of Frontline Pro is how you interact and communicate with underwriting and other staff in your agency on pending items regarding your client's policy. The Activities link is located on the top tool bar of the Frontline Pro home page. If the "Activities" link is "red" your agency has new activities to be viewed. Each agency will have its own queue (associated with its unique producer code) which is called the Agency Queue, and this is where Activities will arrive for handling. Frontline recommends that these Activities be assigned by an Administrator, but this unique role is not required. If you are designated an Administrator, there will be a separate User Administrator Guide to discuss your tasks and roles. Once received by the user, Activities can be completed, or they can be assigned to other users in your agency or queues for handling/action.

FEATURES

MANAGE YOUR ACTIVITIES

SEND AND RECEIVE ACTIVITIES USING ACTIVITY ASSIGNMENTS
Communicate directly with Frontline regarding your client's policy

RESOURCES
PORTAL TRAINING HELP:
407-444-0481

The screenshot displays the Frontline Pro user interface. At the top left is the logo for FRONTline INSURANCE. The top navigation bar includes links for Home, Documents, Messages, User2 Acme, and Log out. A red box highlights the 'Activities' link in the navigation bar, which also includes 'Delinquent', 'Company Messages', and 'Links'. Below the navigation bar is a 'POLICIES' section with a '+ START NEW QUOTE' button and a dropdown menu set to 'Everything'. A row of six buttons is visible: 'QUOTE SEARCH', 'POLICY SEARCH', 'RECENTLY VIEWED' (which is highlighted with a green underline), 'RECENTLY ISSUED', 'CANCELLATIONS', and 'CLAIMS'.

ACTIVITIES:

HOW TO MANAGE YOUR ACTIVITIES:

An Activity could be a reminder, note, or task that can either be system generated (such as the need for an outstanding form), or it could be created by an agent, underwriter, or administrator to communicate with one another regarding a specific policy.

The screenshot displays the 'ACTIVITIES' dashboard. At the top, there are four filter buttons: 'UNASSIGNED' (57), 'ALL ASSIGNED' (2), 'ASSIGNED TO ME' (0), and 'EMAIL PREFERENCE' (with an envelope icon). Below these is a dropdown menu currently set to 'Everything'. A link to 'Switch to ADVANCED FILTER' is visible. A 'Due Today' section is present, followed by a footer with links for 'Careers', 'Terms & Conditions', 'Feedback', and 'Agent Resources'. The bottom-most footer text reads: '© Frontline Insurance All Rights Reserved. Build Time: 02/09/2021, 02:55:49'.

ACTIVITIES:

HOW ARE ACTIVITIES SORTED, AND WHY?

The priority is to complete your oldest and/or most critical Activities first. Activities are sorted by "Due Today" or "Due Tomorrow," or due in the "Future." The newest assigned Activities will fall under the "Future" tab.

Due Today >
Due Tomorrow >
Future >

FEATURES

VIEW/COMPLETE YOUR MOST IMPORTANT (OLDEST) ACTIVITIES FIRST
Activities Due Today show first on your screen

RESOURCES
PORTAL TRAINING HELP:
407-444-0481

COMPLETE AN ACTIVITY:

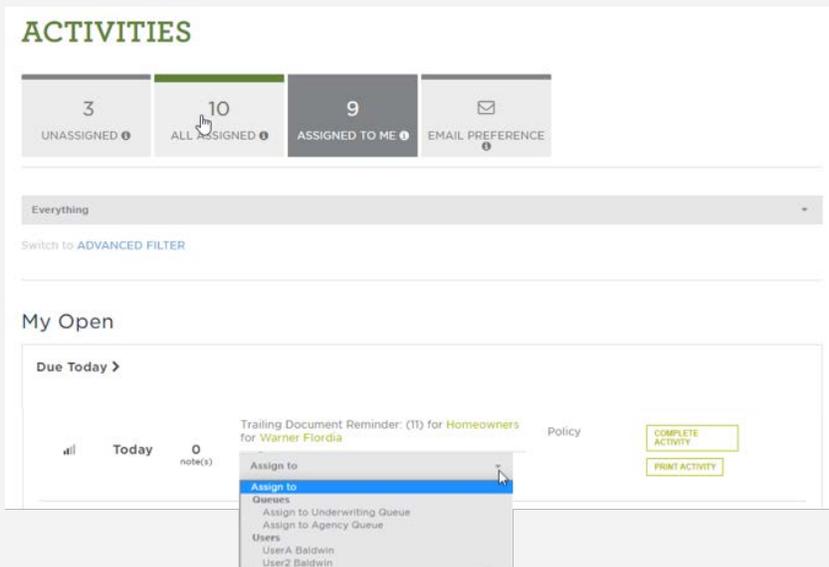
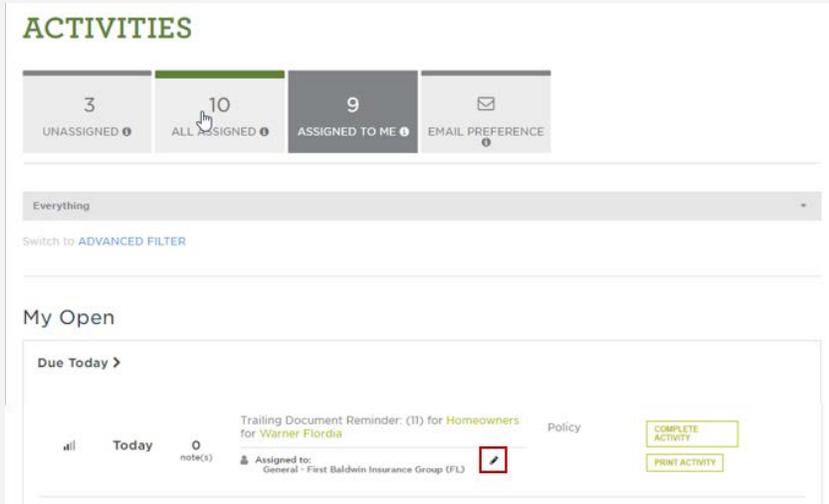
In instances where you have Completed a task, such as uploading a document to underwriting, you will then need to complete your open Activity. Some Activities are for informational purposes only and can be completed directly from the unassigned queue. To complete an Activity, simply click the "Complete This Activity" button. This will remove the item from your Activities list.

The screenshot shows the 'ACTIVITIES' section of a user interface. At the top, there are four filter tabs: 'UNASSIGNED' (3), 'ALL ASSIGNED' (10), 'ASSIGNED TO ME' (9), and 'EMAIL PREFERENCE'. Below the filters is a dropdown menu set to 'Everything' and a link to 'Switch to ADVANCED FILTER'. The main content area is titled 'My Open' and contains a sub-section 'Due Today >'. Under this section, there is one activity card for 'Trailing Document Reminder: (1) for Homeowners for Warner Florida' with a 'Policy' tag. The card shows 'Today' and '0 note(s)'. It is assigned to 'General - First Baldwin Insurance Group (FL)'. On the right side of the card, there are two buttons: 'COMPLETE ACTIVITY' (highlighted with a red box) and 'PRINT ACTIVITY'.

ACTIVITIES:

ASSIGN AN ACTIVITY:

In certain instances, you will need to assign Activities to other users in your agency for further handling. To Assign an Activity to another user, simply select another user from the drop-down list under “Assign to:” Once assigned, the Activity will then appear in their Activities list when they log in under their respective user name.

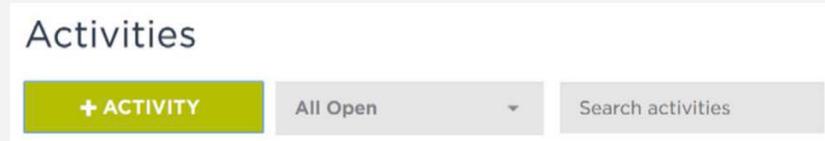


ACTIVITIES:

CREATE AN ACTIVITY:

ACTIVITY:

Start by logging-in to your Frontline Pro Account and selecting a policy you wish to work with. From the Summary page, select the “Activities” tile. Next, select the + Activity button.



TIPS

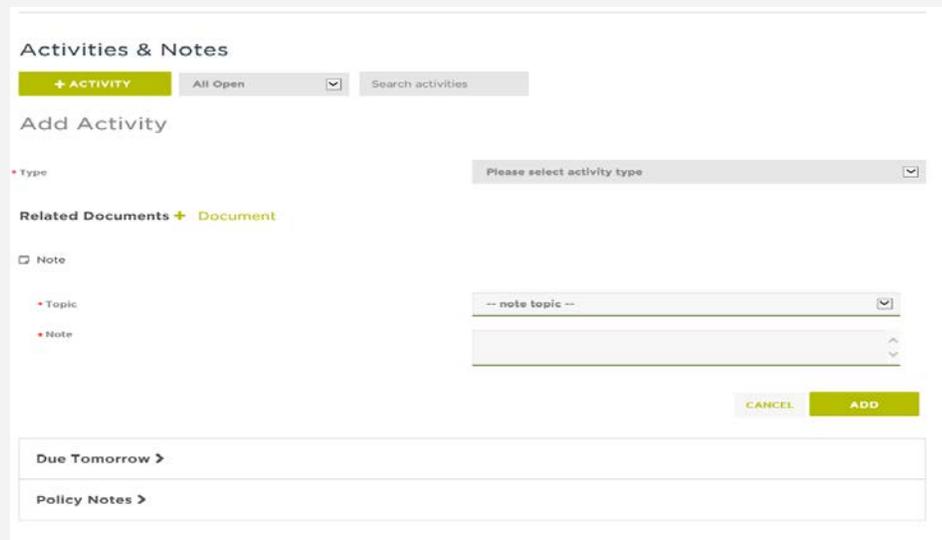
NEED TO FOLLOW UP ON A POLICY CHANGE?
Be sure to select "Customer Service Inquiry" as the Activity Type

OTHER INQUIRIES TO UNDERWRITING?
Use "Underwriting Inquiry" as the Activity Type

RESOURCES
PORTAL TRAINING HELP:
407-444-0481

TYPE/TOPIC/DETAILS:

1. The first step in creating an activity is to choose the activity type. There are three types of activities.
 - a. Customer Service Inquiry
 - b. Effective Date Change: use when the effective date changes on a recently bound policy.
 - c. Underwriting Inquiry
2. The second step is to choose your “topic”. The topics are directly associated with the activity type.
3. The third step is to enter any applicable notes that you want to relay to the underwriter or customer service representative.
4. The fourth and final step is to click “ADD” and your activity has been created.



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