

Welcome to The Dashboard

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Change Date Range
Default Policy Date Range is Six Months

Submitted Apps | Unsubmitted Apps

66 items found, displaying 1 to 15

App#	User Name	Client Name	Submitted Line	AIGswc	CNA Connect	Hartford	OneBeacon	Safeco	Travelers	Zurich	Accord	
549648 ⁹⁹	gbowlin@trytoninsurance.com	KRDH Enterprises, Inc. db...	06/27/08	BOP	N/A	N/A	E	QH	N/A	N/A	N/A	pdf
549455	tryton	Isley, Luke dba Structura...	06/27/08	BOP	N/A	N/A	N/A	M	Q	N/A	N/A	pdf
549360 ⁹⁹	tryton2	BARCELONA, LOUIS	06/26/08	BOP	N/A	QH	E	E	N/A	Q	N/A	pdf
549318	gbowlin@trytoninsurance.com	Dallas Endoscopy Center L...	06/26/08	BOP	N/A	Q	QH	Q	Q	Q	Q	pdf
549265	tryton	Isley, Luke dba Structura...	06/26/08	BOP	N/A	N/A	N/A	N/A	M	Q	N/A	pdf
549240 ⁹⁹	tryton	Rock's Cleaners	06/26/08	BOP	N/A	QH	Q	QH	Q	Q	QH	pdf
549060 ⁹⁹	tryton	BRUCE, CHARLES	06/26/08	BOP	N/A	Q	Q	QH	Q	Q	Q	pdf
549045 ⁹⁹	tryton	Isley, Luke dba Structura...	06/26/08	BOP	N/A	N/A	N/A	N/A	N/A	Q	N/A	pdf
548947 ⁹⁹	tryton	Quickstore, Inc.	06/25/08	BOP	N/A	QH	D	E	N/A	D	N/A	pdf
548923 ⁹⁹	tryton	N.O. Properties	06/25/08	BOP	N/A	QH	N/A	QH	Q	Q	QH	pdf
548848	tryton	Align for Profit, Inc.	06/25/08	BOP	N/A	N/A	N/A	N/A	D	N/A	N/A	pdf
	tryton			WC	!	N/A	N/A	N/A	D	N/A	N/A	pdf
547596 ⁹⁹	tryton2	ONE MART LLC	06/24/08	CommAuto	N/A	N/A	QH	N/A	D	N/A	N/A	pdf
547041	tryton2	KELLY SANCHEZ DBA GUELLE	06/24/08	BOP	N/A	Q	QH	D	D	N/A	QH	pdf
546315	tryton2	COMO CREATIVE	06/24/08	BOP	N/A	N/A	N/A	N/A	N/A	N/A	Q	pdf

[Submit a New Commercial Lines Application](#) | [Submit a New Personal Lines Application](#)
[Submit a Bind Request](#) | [View in Excel](#)

Viewing the status of your applications just got easier with our new “Dashboard.” Shown above is the page you will see after you click on the Dashboard link on your Agency Home page or in the menu at the top of every page. However, this is more than a new look, it is a better way of doing business. The Dashboard will provide you with better access to your quote results, and we think you’ll love what it does for your business. The Dashboard displays the status of all of your applications in one convenient location.

You will be able to view both Submitted Applications and Un-submitted Applications on the Dashboard.

Submitted Applications Tab - The Submitted Apps tab shows five details for each application: 1) Application Number, 2) User Name, 3) Client Name, 3) Date Submitted, 4) Line of Business, and 5) Application Status by carrier such as Q – quote, QH – quote with a hold, N/A – no appetite from carrier. Clicking on any Application Number (App#) brings up the application submitted for easy reference, editing and re-submitting. Each column on the Dashboard can be sorted by clicking on the column header for easy lookup of things such as Insured Name or Date Submitted.

Submitted Apps | Unsubmitted Apps

66 items found, displaying 1 to 15

App#	User Name	Client Name	Submitted Line	AIGswc	CNA Connect	Hartford	
549648 ⁹⁹	gbowlin@trytoninsurance.com	KRDH Enterprises, Inc. db...	06/27/08	BOP	N/A	N/A	E
549455	tryton	Isley, Luke dba Structura...	06/27/08	BOP	N/A	N/A	N/A
549360 ⁹⁹	tryton2	BARCELONA, LOUIS	06/26/08	BOP	N/A	QH	E
549318	gbowlin@trytoninsurance.com	Dallas Endoscopy Center L...	06/26/08	BOP	N/A	Q	QH
549265	tryton	Isley, Luke dba Structura...	06/26/08	BOP	N/A	N/A	N/A

Dashboard shows the number of items (66) and then displays the first 15.

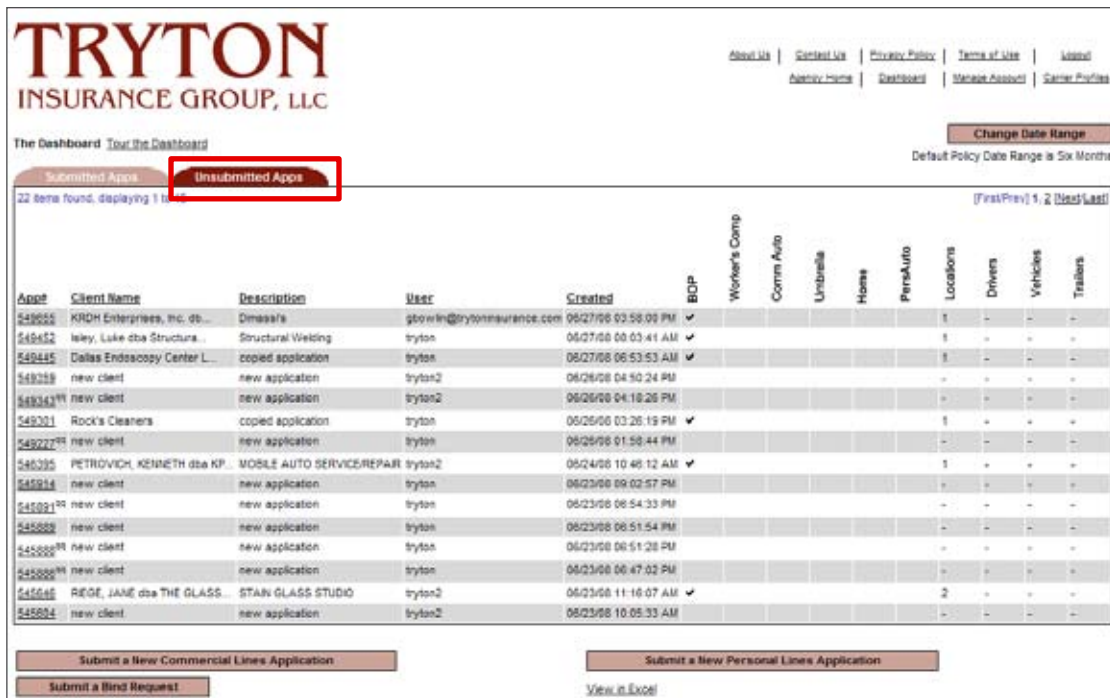
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Revised 9/2/2008



Un-Submitted Applications Tab - The Un-Submitted Apps tab shows 7 application details which makes managing your uncompleted applications easier: 1) Application Number, 2) Client Name, 3) Description, 4) User - who entered application, 5) Create Date, 6) Lines of Business requested on application, and 7) Details about locations, drivers, and vehicles on policy. If you have stopped and exited in the middle of an application for any reason, or have clicked the **Save and Finish Later** button, your incomplete application can be found under the Un-Submitted Apps tab.

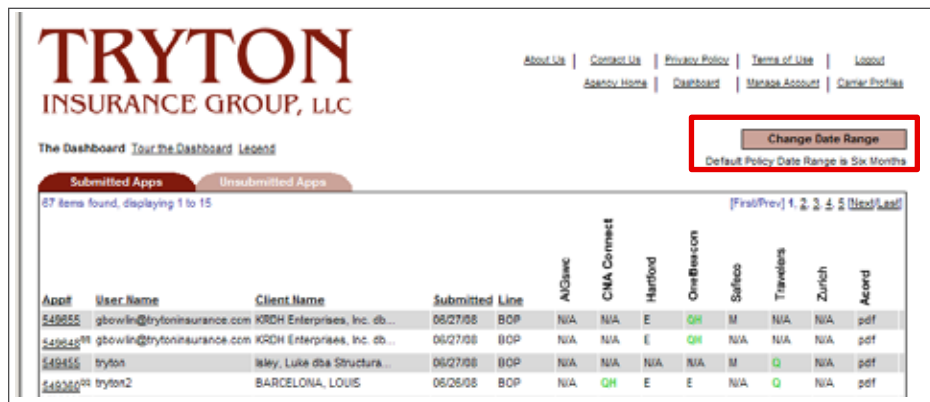
Save and Finish Later



The dashboard shows the following table of Unsubmitted Apps:

App#	Client Name	Description	User	Created	BCP	Worker's Comp	Comm Auto	Umbrella	Homes	PersAuto	Locations	Drivers	Vehicles	Trailers
549655	KROH Enterprises, Inc. db...	Dimesa's	gbowlin@trytoninsurance.com	06/27/08 03:58:09 PM	✓						1	-	-	-
549652	Isley, Luke dba Structura...	Structural Welding	tryton	06/27/08 06:03:41 AM	✓						1	-	-	-
549646	Dallas Endoscopy Center L...	copied application	tryton	06/27/08 06:53:53 AM	✓						1	-	-	-
549759	new client	new application	tryton2	06/26/08 04:50:24 PM							-	-	-	-
549343	new client	new application	tryton2	06/26/08 04:18:26 PM							-	-	-	-
549701	Rock's Cleaners	copied application	tryton	06/26/08 03:26:15 PM	✓						1	-	-	-
549727	new client	new application	tryton	06/26/08 01:58:44 PM							-	-	-	-
549395	PETROVICH, KEI'NEETH dba KP...	MOSLE AUTO SERVICE/REPAIR	tryton2	06/24/08 10:46:12 AM	✓						1	-	-	-
549914	new client	new application	tryton	06/23/08 09:02:57 PM							-	-	-	-
549991	new client	new application	tryton	06/23/08 08:54:33 PM							-	-	-	-
549888	new client	new application	tryton	06/23/08 06:51:54 PM							-	-	-	-
549888	new client	new application	tryton	06/23/08 06:51:28 PM							-	-	-	-
549888	new client	new application	tryton	06/23/08 06:47:02 PM							-	-	-	-
549646	REGE, JANE dba THE GLASS...	STAIN GLASS STUDIO	tryton2	06/23/08 11:16:07 AM	✓						2	-	-	-
549884	new client	new application	tryton2	06/23/08 10:05:33 AM							-	-	-	-

Change Date Range – The Dashboard will automatically default the Date Range for applications displayed to 6 months. If another date range is desired, or if you would like to change other available filters, click on the Change Date Range button shown on the upper right side of the Dashboard.



The dashboard shows the following table of Submitted Apps:

App#	User Name	Client Name	Submitted Line	AGlwe	CNA Connect	Hartford	OneBrewcon	Safeco	Travelers	Zurich	Accord
549655	gbowlin@trytoninsurance.com	KROH Enterprises, Inc. db...	06/27/08 BOP	N/A	N/A	E	GH	M	N/A	N/A	pdf
549646	gbowlin@trytoninsurance.com	KROH Enterprises, Inc. db...	06/27/08 BOP	N/A	N/A	E	GH	N/A	N/A	N/A	pdf
549655	tryton	Isley, Luke dba Structura...	06/27/08 BOP	N/A	N/A	N/A	M	G	N/A	pdf	
549701	tryton2	BARCELONA, LOUIS	06/26/08 BOP	N/A	GH	E	E	N/A	Q	N/A	pdf

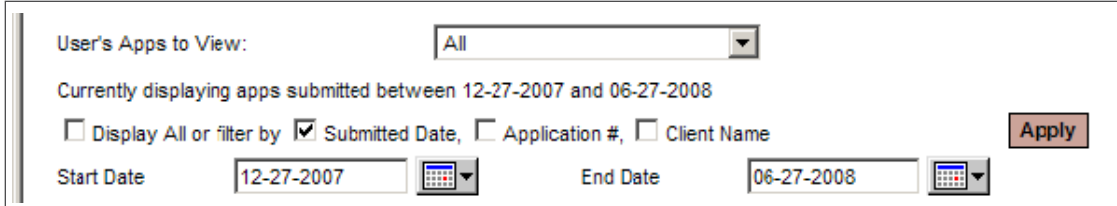
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Clicking on the Change Date Range button brings up the following six options.



User's Apps to View:

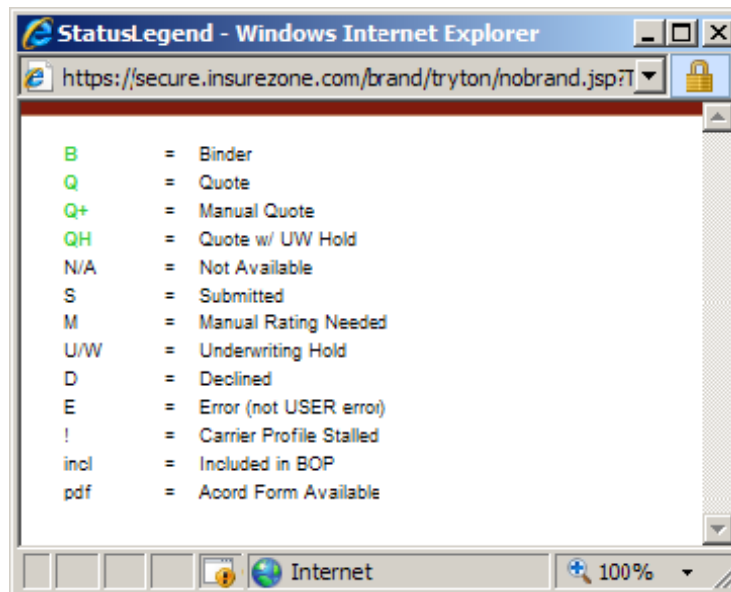
Currently displaying apps submitted between 12-27-2007 and 06-27-2008

Display All or filter by Submitted Date, Application #, Client Name Apply

Start Date: End Date:

1. User's Apps to View: the user of the account, using the dropdown box, will have the option to View All apps, or just the apps for one user
2. Display All: check box
3. Submitted Date: if selected allows user to set a date range for submitted applications
4. Application # Lookup: allows the user to search for specific App#
5. Client Name: allows user to search for specific Client Name
6. Date Ranges: set Start Date and End Date for search

Application Status - Once an application is submitted, the Dashboard will display a status by application for each carrier and for each **Line of Business**. These statuses will immediately indicate whether a carrier has an appetite for that type of risk and whether you can expect an electronic quote. As shown below, B is Binder. Clicking on B will retrieve your binder for that policy. Q is Quoted. Clicking on Q will bring up the quote window for that risk, which will allow you to review the premium, any underwriting issues, view the proposal, and more. S stands for submitted and means that the system is submitting your application to that carrier for a quote. Quotes are normally returned in 2-7 minutes. M stands for Manual Rating Needed. If you see this status, that the application requires manual intervention by our staff in order to get a response from the carrier.

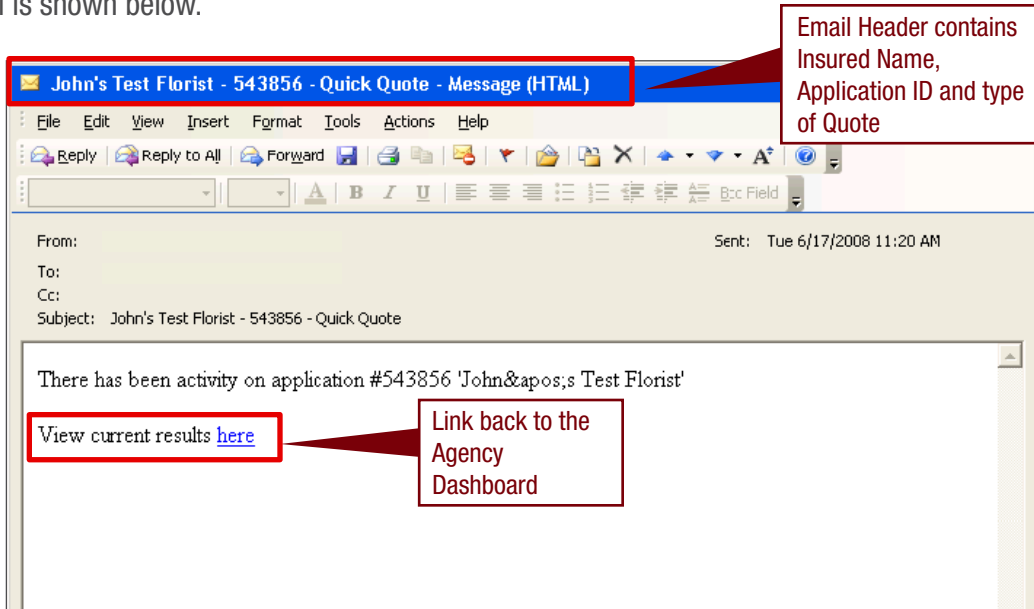


E-Mail Notifications - If you leave your PC connected to our website, results will automatically be displayed on the Dashboard. If you are not connected to the website, you will receive an e-mail notification for each application when it is quoted the first time. If an application is not quoted or receives an Error message, the system will

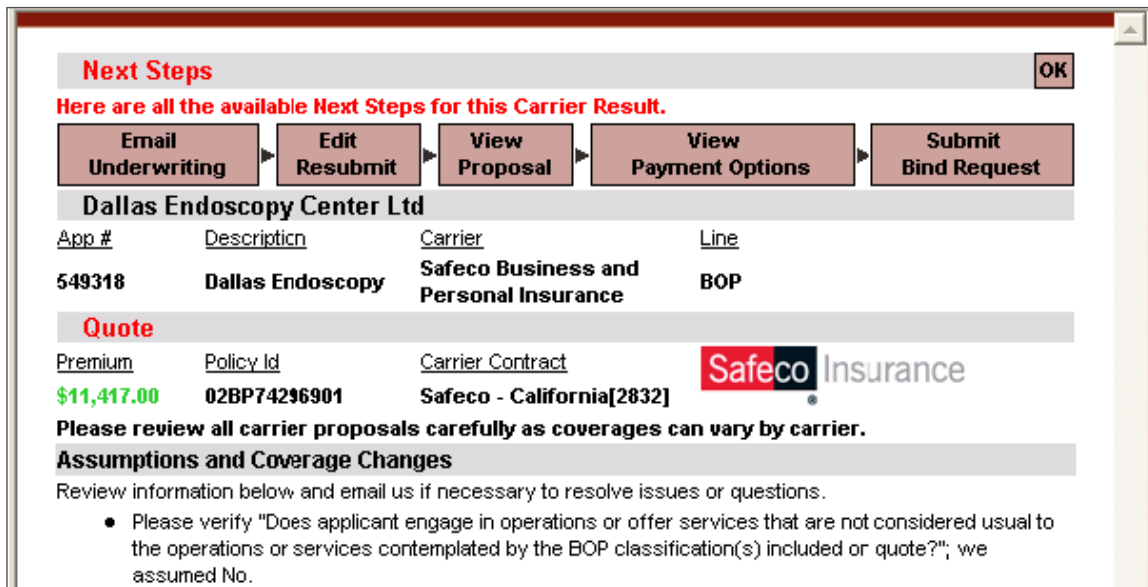
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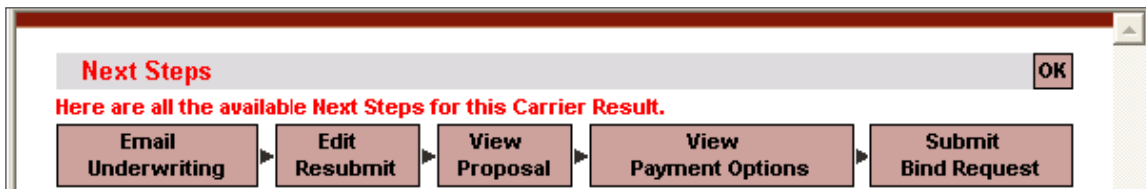
automatically retry the submission after 1 hour, then after 4 hours, and again after 16 hours. The e-mail will have an embedded link, which once clicked, will take you back to the Dashboard to review new updates. An example of the e-mail is shown below.



Application Status Popup - Clicking on any status displayed on the Dashboard will bring up the **Status Popup Window** similar to the one shown below.



There are five work flow steps available for this quote from Safeco.



1. Email Underwriting – click here to send an e-mail directly to the Underwriter that has been assigned to your submission
2. Edit Re-submit – allows the user to edit an existing application and then re-submit it to receive another quote. This is especially helpful when your agency writes a similar business types, or when you would like to quickly see the impact of premium amending something like the deductible
3. View Proposal – clicking on this link brings up the proposal directly from the carrier’s proposal system
4. View Payment Options – allows the user to see the payment options available for this carrier
5. Submit Bind Request – clicking here brings up the online bind request form
 - Clicking OK takes you back to the Dashboard

Dallas Endoscopy Center Ltd			
App #	Description	Carrier	Line
549318	Dallas Endoscopy	Safeco Business and Personal Insurance	BOP
Quote			
Premium	Policy Id	Carrier Contract	Safeco Insurance
\$11,417.00	02BP74296901	Safeco - California[2832]	

Please review all carrier proposals carefully as coverages can vary by carrier.

Assumptions and Coverage Changes
Review information below and email us if necessary to resolve issues or questions.

- Please verify "Does applicant engage in operations or offer services that are not considered usual to the operations or services contemplated by the BOP classification(s) included on quote?"; we assumed No.

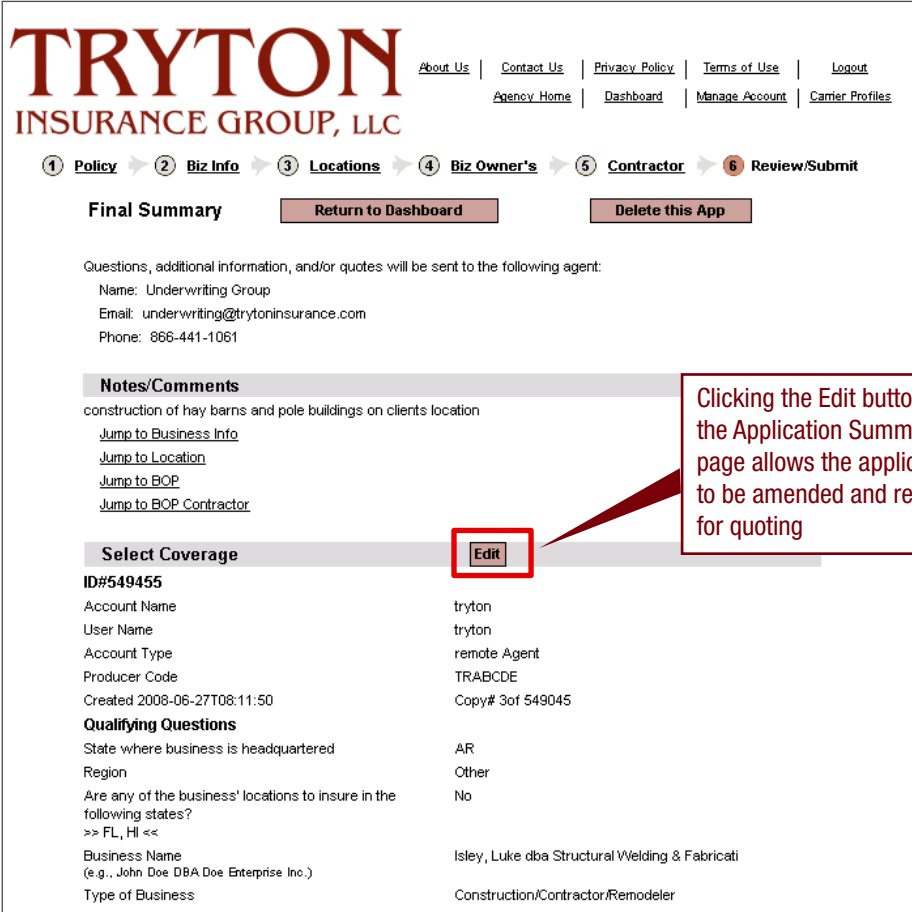
The next section of the Quote Window is shown below and contains:

Application Number (**549318**), Insured Name (**Dallas Endoscopy**), Carrier (**Safeco**), Line of Business (**BOP**), Premium (**\$11,417**), and Policy ID (**02BP7496901**)

Assumptions and Coverage Changes – the bottom section of the Quote Window shows Assumptions and Coverage Changes. This section displays the application assumptions or changes to the application that were required in order to get a proposal from this carrier. These changes either shorten the application process or enable a quote to be returned in a situation where, for example, the user chooses a \$10,000 deductible and the carrier’s minimum deductible is \$15,000. This section also details Decline reasons or situations where additional information is required in order to release an Underwriting Hold.

Edit/Re-Submit an Application

Clicking the Edit/Resubmit button takes you to the Application Summary page as shown below. This page can also be reached by clicking on the Application number on the Dashboard. This summary page is used to review application details and if required the user can click on the Edit button in any section to make changes in order to resubmit the application for a quote. Clicking on the Return to Dashboard returns the user to the Dashboard.



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① [Policy](#) → ② [Biz Info](#) → ③ [Locations](#) → ④ [Biz Owner's](#) → ⑤ [Contractor](#) → ⑥ [Review/Submit](#)

Final Summary [Return to Dashboard](#) [Delete this App](#)

Questions, additional information, and/or quotes will be sent to the following agent:
 Name: Underwriting Group
 Email: underwriting@trytoninsurance.com
 Phone: 866-441-1061

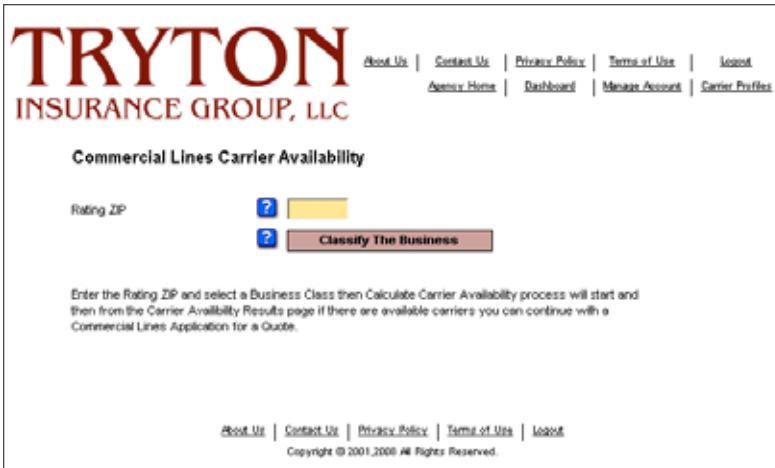
Notes/Comments
 construction of hay barns and pole buildings on clients location
[Jump to Business Info](#)
[Jump to Location](#)
[Jump to BOP](#)
[Jump to BOP Contractor](#)

Select Coverage [Edit](#)

ID#549455
 Account Name: tryton
 User Name: tryton
 Account Type: remote Agent
 Producer Code: TRABCDE
 Created 2008-06-27T08:11:50 Copy# 3of 549045

Qualifying Questions
 State where business is headquartered: AR
 Region: Other
 Are any of the business' locations to insure in the following states? No
 >> FL, HI <<
 Business Name: Isley, Luke dba Structural Welding & Fabricati
 (e.g., John Doe DBA Doe Enterprise Inc.)
 Type of Business: Construction/Contractor/Remodeler

How to Submit an Application - Clicking on the Submit A New Application button brings up the Quick Qualifying Page as shown below. Entering the rating zip code and classifying the business enables the system to return carrier availability and underwriting guidelines.



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Commercial Lines Carrier Availability

Rating ZIP: [?](#) [Classify The Business](#)

Enter the Rating ZIP and select a Business Class then Calculate Carrier Availability process will start and then from the Carrier Availability Results page if there are available carriers you can continue with a Commercial Lines Application for a Quote.

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