

**AmeriTrust BOP Portal
System Training Documentation
Navigation**



BOP Portal Homepage

The portal homepage is made up of several sections as indicated below. Additional information is provided that will allow you to get a better feel for our system.

Home

Start a New Quote

Contact Information

Feedback

Profile

Appetite Guide

Message Center

Quote Activity

The screenshot shows the AmeriTrust BOP Portal homepage. At the top, the AmeriTrust logo is on the left, and navigation links for 'Home', 'Start a New Quote', 'Contact Information', 'Feedback', and 'Profile' are on the right. Below the navigation bar is a secondary menu with links for 'Small Commercial - Business Owners', 'Appetite Search', 'Start a New Quote', 'BOP Endorsement Comparison', 'User Administration', and 'Metrics'. On the right side of this menu, it says 'Welcome Mark Cusson [Log Out] | Feedback | User Profile'.

The main content area is divided into three sections:

- Appetite Guide:** Titled 'Small Commercial Business Owners Appetite Guide', it includes 'Appetite Guide and Target Classes' (Mercantile & Convenience Food Stores, Home Furnishings & Maintenance Stores, Services, Offices) and 'Special Features' (Multi-Year Policy Capability with Locked-in Rates, Up to 35,000 sq. ft. total floor, Sales up to \$6,000,000, Professional liability coverage).
- Message Center:** Contains three messages dated 05/30/19 and 06/05/19 regarding the portal trial, pilot feedback, and policy updates.
- Contact Information:** Provides 'Agency Information' (Agency Name: Internal User (), Phone:), 'Underwriter Information' (Name: Brian Gibbs, Phone: (248) 204-8164, Email: brian.gibbs@ameritrustgroup.com), 'Technical Support' (Call: (248) 204-6136), and 'Billing and Policy Questions' (Call: (800) 825-9489, Email: calls.center@ameritrustgroup.com).

At the bottom is the 'Quote Activity' section, which is a table with columns for Applicant, Policy/Quote Number, Status, Effective Date, Premium, and Actions. The table includes filter boxes for Applicant and Policy/Quote Number, a status dropdown set to 'All', and a 'Clear Filters' button. The first row of data shows 'TEST BOP ONLY DELONG'S FRAMER'S MARKET INC' with policy number 'BOP1000066' and a status of 'Quoted'.

Appetite Guide

The top section on the your portal homepage is the Small Commercial Business Owners Appetite Guide. The Appetite Guide will provide basic information on the special features and target class codes we accept.

Summary information is displayed on the top left of the homepage as well as Searching the Appetite Guide for specific types of business.

Small Commercial Business Owners Appetite Guide

Appetite Guide and Target Classes

- Mercantile & Convenience Food Stores
- Home Furnishings & Maintenance Stores
- Services
- Offices

[Search Appetite Guide](#)

Special Features

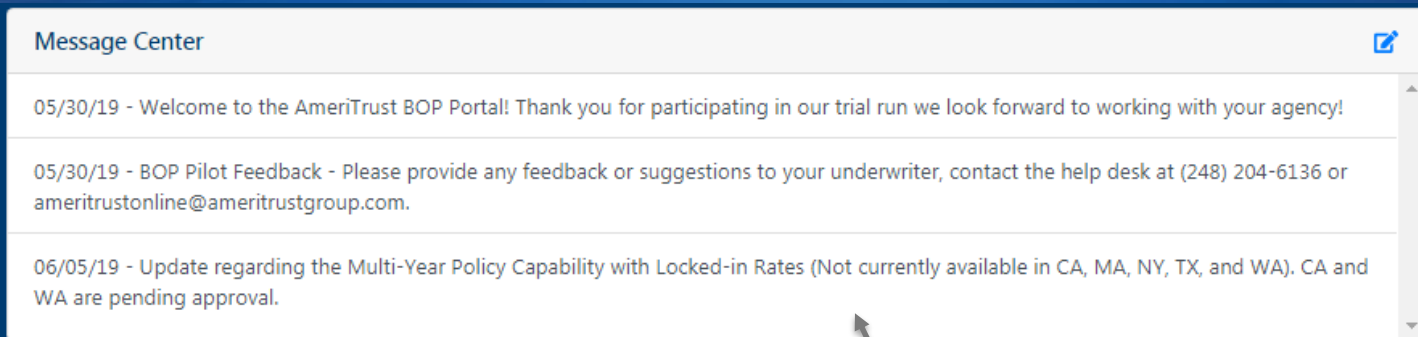
- Multi-Year Policy Capability with Locked-in Rates (Not available in CA, MA, NY, TX, and WA)
- Up to 35,000 sq. ft. total floor (Offices up to 100,000 sq. ft.)
- Sales up to \$6,000,000
- Professional liability coverage available for applicable services classes

Search by Description, Type of Business, Class Code and Eligibility Status. Also allows for column sort.

Description ^	Type of Business Code (SIC) v	Class Code v	Eligibility v
Filter Description	Filter Type of Business Code (SIC)	Filter Class Code	All v
Accounting Services CPAs (Office)	8721	63631	Eligible
Accounting Services Except CPAs (Office)	8721	63611	Eligible
Apartment Buildings - 4 families or fewer, with no office occupancy - includes 3- or 4- family lessor's risk only	6513	65144	Ineligible
Appliance Stores Household Appliances and Home Furnishings	5722	57224	Eligible
Appliance Stores Radio, Television and Phonographic Store (including parts and supplies)	5731	57326	Eligible
Art Galleries Not-For-Profit	8412	84112	Eligible

Message Center

Right below the appetite guide on the homepage is the message center section. Here you will find important messages which can be anything from welcome messages to upcoming system maintenance windows.



The screenshot shows a 'Message Center' window with a list of three messages. The first message is dated 05/30/19 and is a welcome message. The second message is also dated 05/30/19 and is about BOP Pilot Feedback. The third message is dated 06/05/19 and is about a policy update. An arrow points from the third message in the list to a larger, detailed view of that same message below.

Message Center ✉

05/30/19 - Welcome to the AmeriTrust BOP Portal! Thank you for participating in our trial run we look forward to working with your agency!

05/30/19 - BOP Pilot Feedback - Please provide any feedback or suggestions to your underwriter, contact the help desk at (248) 204-6136 or ameritrustonline@ameritrustgroup.com.

06/05/19 - Update regarding the Multi-Year Policy Capability with Locked-in Rates (Not currently available in CA, MA, NY, TX, and WA). CA and WA are pending approval.

Click on a message for additional information.



This is a detailed view of the message selected in the screenshot above. It features a dark blue header with the message title, a white body with the message content, and a 'Close' button at the bottom right. Metadata such as 'Created: 06/05/19' and 'Priority: 3' is also visible.

Update regarding the Multi-Year Policy Capability with Locked-in Rates (Not currently available in CA, MA, NY, TX, and WA). CA and WA are pending approval.

Created: 06/05/19 Priority: 3

Close

Contact Information

The right section on the homepage is the important contact information. This includes your agency information, underwriter contact information, technical support, Policy and Policy Questions.

Contact Information

Agency Information:
Agency Name (#) : MEADOWBROOK, INC (3584020)
Phone : (800) 482-0626

Underwriter Information
Name : Brian Gibbs
Phone : (248) 204-8164
Email : brian.gibbs@ameritrustgroup.com

Technical Support:
Call : (248) 204-6136

Billing and Policy Questions:
Call : (800) 825-9489
Email : calls.center@ameritrustgroup.com

Underwriter Contact

Any feedback or questions related to the appetite guide, BOP policy or location coverages or referral information.

Technical Contact

Any feedback or questions related to workflow, errors, problems accessing or quote entry. Also we provide a “Feedback” link to email us in the upper right menu bar. These emails are monitored frequently.

Billing and Policy Questions

Once a policy has been written with us, any questions related to the policy, print, loss runs or billing can be reported here.


Main Navigation Bar

On the top of the homepage are your main navigation links.

Small Commercial - Business Owners | [Appetite Search](#) | [Start a New Quote](#) | [BOP Endorsement Comparison](#)

- ✓ **Appetite Search** is where you would search for types of business we will accept.
- ✓ **Start a New Quote** will open the quoting application
- ✓ **BOP Endorsement Comparison** is a document summarizing and comparing our Silver, Gold and Platinum coverage plans.

To the right on the main navigation bar will display who you are logged in as in addition to

Welcome Mark Cusson [[Log Out](#)] | [Feedback](#) | 

- ✓ **Logout** will end this session and return you to the beginning login page.
- ✓ **Feedback** creates an email that any information, suggestions or feedback can be sent to.
- ✓ **Profile Link** is where you will see your basic id information and allow you to change/reset your password.

Quote Activity

The bottom section on the homepage will display all your quotes and their status.

Top section of the Quote Activity allows sort search on applicant name, quote number or quote status. Each column can be sorted ascending or descending.

Applicant	Policy/Quote Number	Status	Effective Date	Premium	Actions			
<input type="text" value="Filter Applicant"/>	<input type="text" value="Filter Policy/Quote Number"/>	<input type="text" value="All"/>			<input type="button" value="Clear Filters"/>			
brians clothing store	BOQ1004617	Submitted/Referred	04/05/19	\$2,104	Edit	View	Submit	Delete/Archive
Test Mark	BOQ1004030	Submitted/Referred	03/14/19	\$1,036	Edit	View	Submit	Delete/Archive
Mighty Mouse Express Delivery	BOQ1004022	Submitted/Referred	03/08/19	\$1,132	Edit	View	Submit	Delete/Archive
Jaime Lannister's Finger Painting Art Gallery	BOQ1003979	Unquoted	04/25/19	\$0	Edit	View	Submit	Delete/Archive
Tyrior Lannister's Kingdom Accounting Service	BOQ1003978	Unquoted	03/07/19	\$1,967	Edit	View	Submit	Delete/Archive
Jon Snow's Ice Cream Shoppe	BOQ1003971	Quoted	03/08/19	\$1,039	Edit	View	Submit	Delete/Archive
Daenerys Targaryen's Dragon Fire Bakery	BOQ1003967	Quoted	03/25/19	\$1,546	Edit	View	Submit	Delete/Archive
Pooh Bear's Honey Farm	BOQ1003966	Quoted	03/14/19	\$1,054	Edit	View	Submit	Delete/Archive
Detroit Danish and Doughnut	BOQ1003439	Quoted	02/25/19	\$545	Edit	View	Submit	Delete/Archive
Shortbread Cookie Company	BOQ1003254	Unquoted	02/27/19	\$0	Edit	View	Submit	Delete/Archive

Quote Activity Fields

- ✓ **Applicant Name** – Insured Name for the quote
- ✓ **Policy/Quote Number** – Quote number is a temporary number associated with the quote and will be changed if bound and issued.
- ✓ **Status** – The quote status affects the actions you are allowed to take.
 - **Unquoted** – Indicates a quote that was started and not completed to the point of rating or if a quoted quote was edited without re-quoting.
 - **Quoted** – A quote that was completed to the point of rating but not submitted to the underwriter for review.
 - **Referred** – Indicates a quote that was submitted to the underwriter and is under review.

Quote Activity Continued...

Quote Activity Fields

✓ **Effective Date** The Effective Date of Quote

✓ **Premium** – Quoted premium associated with the quote.

✓ **Actions** – Options available

- **Edit** – Opens up the quoting application and allows for making changes and re quoting.
- **View** – A quote summary of all values entered and quoting information.
- **Submit** – Opens up the quoting application to the premium tab and re quotes, allows quote submission to underwriter for approval.
- **Delete/Archive** – Archives quote to remove from main quote activity list. If a quote was archived and needs to be unarchived please contact technical support.

Quote Activity									
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Page 3 of 5