

The logo for Root, featuring the word "Root" in a bold, orange, sans-serif font. The background of the entire page is a grayscale photograph of a cityscape at dusk or dawn, with mountains in the distance and a blurred car in the foreground.

Root

Root Agent Platform

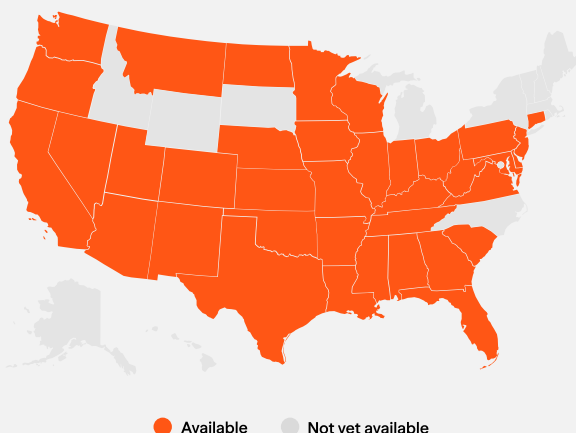
Quick Start Guide

About Root

We're revolutionizing car insurance

Root is a technology company on a mission to revolutionize car insurance through data science and a powerful technology platform. We are a full-service insurance carrier empowering customers and agents alike.

Available in 36 states



Founded in 2015

Headquartered in Columbus, OH

Fully licensed P&C insurance carrier

36 states and counting

16.8 million Root app downloads

A modern, tech-driven agent experience

Our relentless focus on ease, transparency, and customization is an ideal fit for the agent channel, a channel long-neglected from innovation, user-experience enhancements, and updated technology. We've built an insurance product that enables simplified distribution from agents to their customers.

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Getting started

Accessing your dashboard

Log into the Root Agent Platform to access your dashboard and begin a quote.

- Click “Start/resume quote” to begin the quoting process.

The screenshot shows the Root Agent Platform dashboard. At the top left is the logo 'R Root Agent Platform Root Insurance'. At the top right is the user name 'FIRSTNAME LASTNAME' with a dropdown arrow. Below the header is a search bar with the text 'Search by complete email...'. Below the search bar is a table with the following data:

Name	Phone	Email	Covered	Inception Date	Current Term
Hulk Hogan	(210) 857-4761	testtest@test.com	✓	July 16, 2025	07/16/2025 - 01/16/2026

Below the table is a 'Start / resume quote' button, which is highlighted by a callout box with an arrow pointing to it from the text above.



Getting started

Beginning the quote

Enter your client's email.

- Ensure your client provides a valid email address for correspondence regarding their policy. Click "Continue."

The screenshot shows a web interface for the Root Agent Platform. At the top left, there is a logo with the letter 'R' and the text 'Root Agent Platform' and 'Root Insurance'. At the top right, there is a 'Close X' button. The main content area is a light gray background. In the center, there is a white modal box with a rounded border. The modal box has a title 'Enter your client's email' and a text input field containing the email address 'james.smith@email.com'. Below the input field is a large orange button with the text 'Continue'. A black arrow points from the text 'Click "Continue."' in the list above to the 'Continue' button in the modal box.




Getting started

Obtaining driver information

Input PNI and collect consent.

- Input the primary driver's first and last name, date of birth, address, and phone number.

 Root Agent Platform
Root Insurance

We'll need a few details to start your quote.

Primary driver information

You can add more details and additional drivers later.

Client's first name James	Client's last name Smith
Date of birth 05/07/65	
Address, city, state, zip * 12345 6th St, San Jose, CA 87654	
Address 2	

[Can't find your address?](#)

Client's email address james.smith@email.com
Client's phone number 555-555-5555

Please read the following to your client:

"Root, or a third party to Root, may use consumer reports, like your credit or driving history, to underwrite and price your policy."

I've read this disclosure to my client

[Cancel without saving](#) [Start quote](#)



Getting started

Obtaining driver information

Input PNI and collect consent.

Input the primary driver's first and last name, date of birth, address, and phone number.

- Collect client consent by reading the disclosure aloud. Once consent is collected, click "Start quote."

The screenshot shows the Root Agent Platform interface for collecting driver information. At the top left is the Root Agent Platform logo. The main heading reads "We'll need a few details to start your quote." Below this is a form titled "Primary driver information" with a sub-heading "You can add more details and additional drivers later." The form contains several input fields: "Client's first name" (James), "Client's last name" (Smith), "Date of birth" (05/07/65), "Address, city, state, zip*" (12345 6th St, San Jose, CA 87654), "Address 2", "Client's email address" (james.smith@email.com), and "Client's phone number" (555-555-5555). A red link "Can't find your address?" is positioned below the address fields. Below the form is a consent section titled "Please read the following to your client:" with a disclosure text: "Root, or a third party to Root, may use consumer reports, like your credit or driving history, to underwrite and price your policy." A checkbox is checked, with the text "I've read this disclosure to my client". At the bottom are two buttons: "Cancel without saving" and "Start quote".

1 Drivers Confirming driver information

Carefully review driver information.

- Ensure that the information pulled from Public Records Data is accurate.

Root Agent Platform
Root Insurance

Close X

Review and update driver information

1 Drivers — 2 Vehicles — 3 Additional Questions — 4 Coverages — 5 Review

James Smith
Primary Named Insured In progress

We reviewed this driver using Public Records Data
If new information was found, we updated the fields below.

First name: James
Last name: Smith
Date of birth: 05/07/65
Address: 12345 6th St, San Jose, CA 12345
Email address: james.smith@email.com
Phone number: 555-555-5555
Homeowner status:
Marital status:
Drivers license number: 1238234LWCS
License state:
Age when licensed:
Currently insured?:
How long insured? (Years):
Driver is active duty military. (Optional)
Driver has completed a state-certified defensive driving course in the past 3 years. This must not be court-ordered. (Optional)
Driver qualifies as a good student. GPA is a B or better (3.0+). (Optional)

Would you like to cover any of these drivers?
Drivers listed here are excluded unless added as covered. This includes drivers identified through public records or manually excluded. Select a driver to add them to the policy.
+ Mary Smith + Tommy Smith + Amelia Johnson

+ Add another driver

Go back Continue

1 Drivers

Confirming driver information

Carefully review driver information.

Ensure that the information pulled from Public Records Data is accurate.

- Use Public Records Data to add additional drivers to the policy. You may also manually add drivers by selecting “Add another driver.”

Root Agent Platform
Root Insurance

Close X

Review and update driver information

1 Drivers — 2 Vehicles — 3 Additional Questions — 4 Coverages — 5 Review

James Smith
Primary Named Insured In progress

We reviewed this driver using Public Records Data
If new information was found, we updated the fields below.

First name: James | Last name: Smith

Date of birth: 05/07/65

Address: 12345 6th St, San Jose, CA 12345

Email address: james.smith@email.com | Phone number: 555-555-5555

Homeowner status: | Marital status: |

Drivers license number: 1238234LWCS

License state: | Age when licensed: |

Currently insured?: | How long insured? (Years): |

Driver is active duty military. (Optional)

Driver has completed a state-certified defensive driving course in the past 3 years. This must not be court-ordered. (Optional)

Driver qualifies as a good student. GPA is a B or better (3.0+). (Optional)

Would you like to cover any of these drivers?
Drivers listed here are excluded unless added as covered. This includes drivers identified through public records or manually excluded. Select a driver to add them to the policy.

+ Mary Smith + Tommy Smith + Amelia Johnson

+ Add another driver

1 Drivers

Confirming driver information

Carefully review driver information.

Ensure that the driver information pulled from Public Records Data is accurate. Use Public Records Data to add additional drivers to the policy. You may also manually add drivers by selecting “Add another driver.”

To specifically exclude a driver, toggle the switch as demonstrated below. Once all driver information is inputted and reviewed, select “Continue.”

Root Agent Platform
Root Insurance

Close X

Review and update driver information

1 Drivers — 2 Vehicles — 3 Coverages — 4 Review

James Smith
Primary Named Insured

Jasmine Smith
Covered Driver

First Name: Jasmine
Last name: Smith
Date of birth: 03/07/1992
Drivers license number: 453456234
License state: CA
Age when licensed: 18

Driver is on Active Military Duty. (Optional)

Driver has completed a state-certified defensive driving course in the past 3 years. This must not be court-ordered. (Optional)

Driver qualifies as a good student. GPA is a B or better (3.0+). (Optional)

Exclude driver from the policy. Coverage will not apply if this driver operates a covered vehicle.

Remove driver from the policy

Would you like to cover any of these drivers?
Drivers listed here are excluded unless added as covered. This includes drivers identified through public records or manually excluded. Select a driver to add them to the policy.

+ Mary Smith + Tommy Smith + Amelia Johnson

+ Add another driver

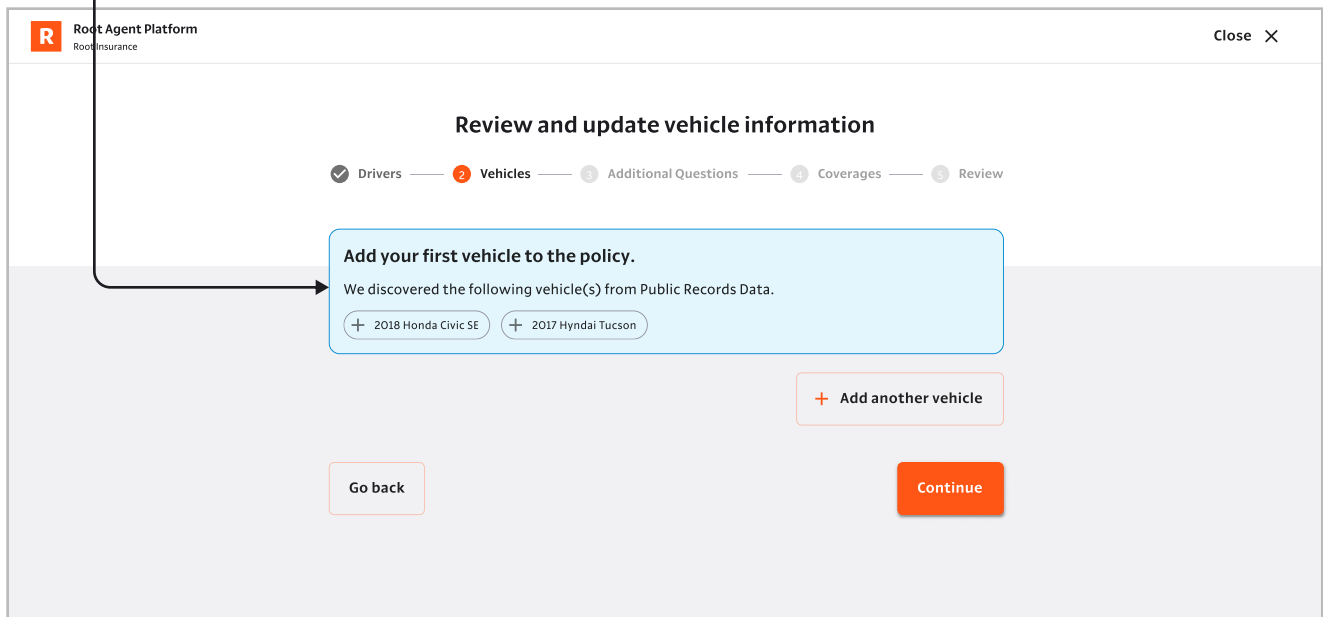
Go back Continue

2 Vehicles

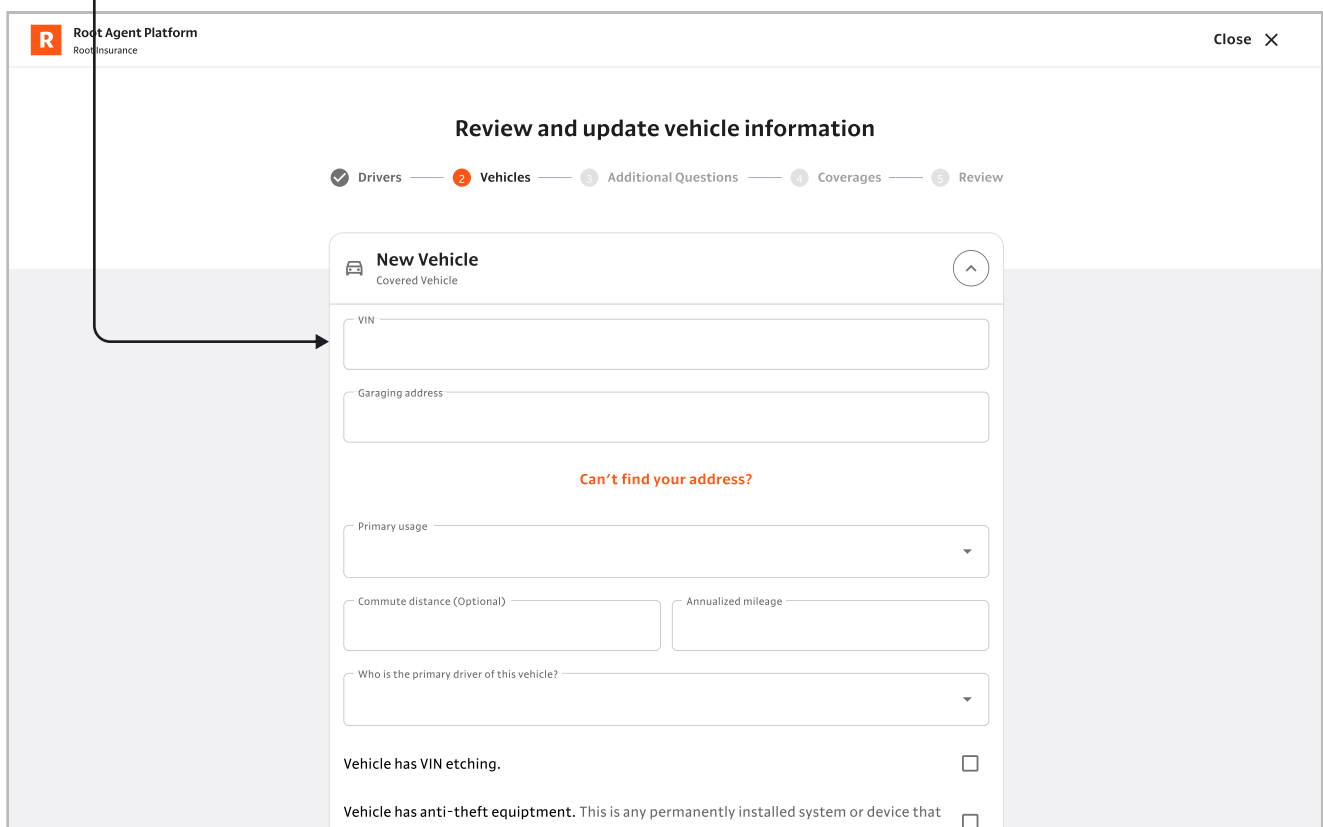
Confirming vehicle information

Carefully review vehicle information.

- Ensure that the vehicle information pulled from Public Records Data is accurate. Then, collect self-reported mileage from the client.



- Or fill out manually if no vehicles are found.



2 Vehicles

Confirming vehicle information

Carefully review vehicle information.

Ensure that the vehicle information pulled from Public Records Data is accurate. Then, collect self-reported mileage from the client.

- Use Public Records Data to add additional vehicles to the policy. You may also manually add vehicles by selecting “Add another vehicle.” When all vehicles are added, click “Select coverages.”

Root Agent Platform
Root Insurance

Close X

Review and update vehicle information

✓ Drivers — 2 Vehicles — 3 Additional Questions — 4 Coverages — 5 Review

✓ 2018 Honda Civic SE
Covered Vehicle

VIN
12345678910

Garaging address
12345 6th St, San Jose, CA 87654

Can't find your address?

Primary usage
Commuter

Commute distance
5 miles

Annualized mileage
12,500

Who is the primary driver of this vehicle?
James Smith

Vehicle has VIN etching.

Vehicle has anti-theft equipment. This is any permanently installed system or device that is designed to prevent theft beyond standard door locking.

Remove vehicle from the policy

Would you like to cover any of these vehicles?
Vehicles discovered through public records data or those who have been manually added and then removed will appear here. Select a vehicle to add them as covered on the policy.

+ 2017 Hyundai Tucson

+ Add another vehicle

Go back Continue

3 Additional Questions

Assigning primary vehicle drivers

Carefully review vehicle information.

- For multiple vehicles with multiple drivers, select the primary vehicle for each driver. After matching drivers with their respective vehicles, click “Continue.”

Root Agent Platform
Root Insurance

Close X

Additional Questions

✓ Drivers — ✓ Vehicles — 3 Additional Questions — 4 Coverages — 5 Review

Which vehicle does each driver use the most?

[Why do we ask this?](#)

James Smith

2018 Honda Civic SE	<input type="radio"/>
2020 Toyota Camry LE	<input checked="" type="radio"/>

Mary Smith

2018 Honda Civic SE	<input type="radio"/>
2020 Toyota Camry LE	<input type="radio"/>

Go back

Continue

4 Coverages Choosing the right coverages

Select coverages for your client's vehicle(s).

Our platform provides informative context for minimums and state-specific coverages. As you select coverages, reference the quote on the right side of the screen for the bindable price. When finished, click "Review quote summary."

Root Agent Platform
Root Insurance

Close X

Select your coverages

Drivers Vehicles Additional Questions **Coverages** Review

Protect others on the road

Liability coverage is required by law and covers injuries to others and damage to their property if you're responsible for an accident.

Bodily injury

Covers medical expenses for others injured when you cause an accident.

Coverage level: \$250k per person/\$500k per accident

Property damage Required

Covers damage costs to vehicles or property when you cause an accident.

Coverage level: \$50k per accident

Protect your car

These coverages pay for damage to your vehicles from collisions, weather, theft, and other unexpected events.

2018 Honda Civic SE

Collision coverage

Covers repairs or replacement if your car is damaged in an accident, regardless of fault.

Coverage level: \$1000 deductible

Comprehensive coverage

Covers repairs or replacement to your vehicle for non-collision damage like theft, storms, or hitting an animal.

Coverage level: \$500 deductible

Rental coverage

Covers the cost of a rental car while your vehicle is being repaired after an accident.

Coverage level: \$30 per day / \$900 per accident

Bindable price ⓘ
\$756.32/6 mo
Any changes to drivers, vehicles, or coverages may update this price.
\$721.50 Due today [See details](#)

Monthly 6 months

Email quote to client

5 Review

Reviewing and finalizing the quote

Review drivers, vehicles, and coverages.

- Ensure all information is complete and accurate. Be sure to complete any missing or incomplete information.

Root Agent Platform Root Insurance Close X

Review your quote summary

✓ Drivers — ✓ Vehicles — ✓ Additional Questions — ✓ Coverages — **5 Review**

POLICY HOLDER CONTACT INFORMATION **MAILING ADDRESS** Edit

james.smith@email.com 12345 6th St, San Jose, CA 12345
555-555-5555

Covered drivers and vehicles

- ✓ James Smith
Primary Named Insured >
- ✓ Mary Smith
Covered driver >
- ✓ 2018 Honda Civic SE
Covered vehicle >

Driver and vehicle assignments

>

Excluded drivers

Update Excluded Drivers >

These drivers will not be covered in case of an accident.

- Tommy Smith
- Amelia Johnson

Coverage summary

Liability coverage

- Bodily injury
\$250k per person/\$500k per accident >
- Property damage
\$50k per accident >

Vehicle coverages

- 2018 Honda Civic SE
Collision - \$1000 deductible >
- Comprehensive - not selected >
- Rental - not selected

Non-Liability coverage

- Uninsured & underinsured motorist bodily injury
\$250k per person/\$500k per accident >

Medical & wage protection

- Medical expenses
\$250k per person/\$500k per accident >

Bindable price ⓘ

\$756.32/6 mo

Any changes to drivers, vehicles, or coverages may update this price.

\$721.50 Due today [See details](#)

Monthly 6 months

Email quote to client

5

Review

Reviewing and finalizing the quote

Review drivers, vehicles, and coverages.

Ensure all information is complete and accurate. Be sure to complete any missing or incomplete information.

You may share the bindable quote with the client via email.
After review, click “Checkout.”

Root Agent Platform
Root Insurance

Close X

Review your quote summary

Drivers Vehicles Additional Questions Coverages **5 Review**

POLICY HOLDER CONTACT INFORMATION
james.smith@email.com
555-555-5555

MAILING ADDRESS
12345 6th St, San Jose, CA 12345

Bindable price ⓘ
\$756.32/6 mo
Any changes to drivers, vehicles, or coverages may update this price.
\$721.50 Due today See details
Monthly **6 months**

Email quote to client

Covered drivers and vehicles

- James Smith
Primary Named Insured
- Mary Smith
Covered driver
- 2018 Honda Civic SE
Covered vehicle

Driver and vehicle assignments

Excluded drivers

Update Excluded Drivers >

These drivers will not be covered in case of an accident.

- Tommy Smith
- Amelia Johnson

Coverage summary

Liability coverage

- Bodily injury
\$250k per person/\$500k per accident
- Property damage
\$50k per accident

Vehicle coverages

- 2018 Honda Civic SE
Collision - \$1000 deductible
Comprehensive - not selected
Rental - not selected

Non-Liability coverage

- Uninsured & underinsured motorist bodily injury
\$250k per person/\$500k per accident

Medical & wage protection

5

Review

Reviewing and finalizing the quote

Complete the purchase for your client.


Choose a policy start date, confirm contact details, and enter payment information. After finalizing details, click “Purchase policy.”

Root Agent Platform
Root Insurance

Close X

Checkout


✓ Drivers — ✓ Vehicles — ✓ Additional Questions — ✓ Coverages — ✓ Review



Choose a policy start date

Ask the client when they want their policy to start. Clients will be charged today, whether their policy starts today or at a later date.

Policy start date

Your client's contact details

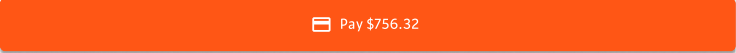
✉ james.smith@email.com

📞 555-555-5555

Enter your client's credit card information

Credit/Debit

Clicking “Pay” will purchase the policy. Root will then send the client an email with legal documents they must complete to keep their policy active.

 Pay \$756.32

[Go back](#)

Bindable price ⓘ

\$756.32/6 mo

Any changes to drivers, vehicles, or coverages may update this price.

\$721.50 Due today [See details](#)

✉ Email quote to client

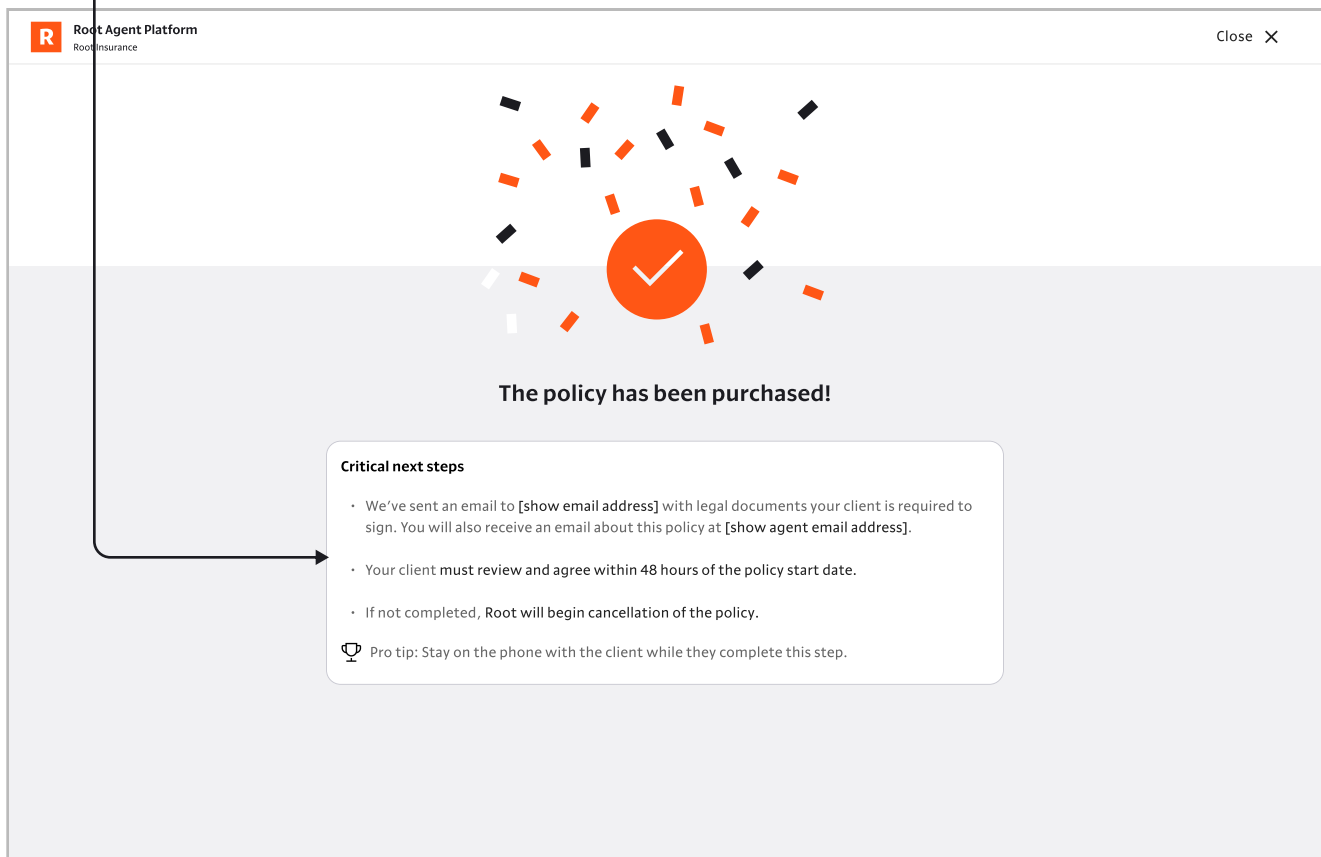
4 Review

Reviewing and finalizing the quote

Complete the purchase for your client.

Choose a policy start date, confirm contact details, and enter payment information. After finalizing details, click “Purchase policy.”

- **Confirm that the client received legal documents via email.**



The screenshot displays the Root Agent Platform interface. At the top left, the logo 'R' and text 'Root Agent Platform' and 'Root Insurance' are visible. At the top right, there is a 'Close X' button. The main content area features a large orange checkmark icon surrounded by a circular pattern of dashed lines. Below this icon, the text reads 'The policy has been purchased!'. A white box with a rounded border contains the following information:

Critical next steps

- We've sent an email to [show email address] with legal documents your client is required to sign. You will also receive an email about this policy at [show agent email address].
- Your client must review and agree within 48 hours of the policy start date.
- If not completed, Root will begin cancellation of the policy.

Pro tip: Stay on the phone with the client while they complete this step.

Questions?

Email us at agentsupport@joinroot.com

Root