



Root

Root Agent Platform

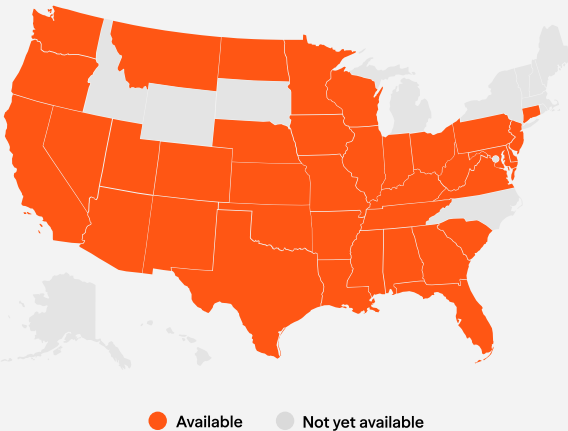
Quick Start Guide

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.

Root Agent Platform
Root Insurance

FIRSTNAME LASTNAME ▾

Policies Open leads

Search by complete email...

1-1 of 1

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

Start / resume quote



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 displays the Root Agent Platform interface. At the top left, there is a logo with a red '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 the title 'Enter your client's email'. Inside the modal, there is a text input field labeled 'Email' with the placeholder text 'james.smith@email.com'. Below the input field is an orange button labeled 'Continue'. A black arrow points from the text 'Click “Continue.”' in the list above to the 'Continue' button.



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."

 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

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☒ I've read this disclosure to my client

Cancel without saving

Start quote

1

Drivers

Confirming driver information

Carefully review driver information.

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

First name
James

Last name
Smith

DOB
//1970

Address
1847 Juniper Ridge Dr, Fort Collins CO, 80525

Email
test@testy.com

Phone number
5555555555

Homeowner Status
Rent

Martial status
Single

Driver's license number
*****077

License state
Colorado

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

Excluded drivers

Household members discovered through public records are excluded by default. Select a driver to add them as covered.

+ Sang Starnes
DL # ***148

+ Add another driver

Go back

Continue

8

1

Drivers

Confirming driver information

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

Once all driver information is inputted and reviewed, select “Continue.”

Root Agent Platform
Root Insurance

Close X

Review and update driver information

Drivers Vehicles Additional questions Coverages Review

James Smith
Primary named insured

Mary Smith
Covered In progress

First name: Mary Last name: Smith

Birth date: 09/09/1973 Marital status: Single

Driver's license number

License state

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

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

Remove driver from policy

Excluded drivers
Household members discovered through public records are excluded by default. Select a driver to add them as covered.

Sang Starnes
DL# ****148

+ 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.

Root Agent Platform
Root Insurance

Close X

Review and update vehicle information

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

Add your first vehicle to the policy.

We discovered the following vehicle(s) from Public Records Data.

+ 2018 Honda Civic SE + 2017 Hyundai Tucson

+ Add another vehicle

Go back Continue

- Or fill out manually if no vehicles are found.

Root Agent Platform
Root Insurance

Close X

Review and update vehicle information

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

New Vehicle
Covered Vehicle

VIN

Garaging address

Can't find your address?

Primary usage

Commute distance (Optional) Annualized mileage

Who is the primary driver of this vehicle?

Vehicle has VIN etching.

Vehicle has anti-theft equipment. This is any permanently installed system or device that

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

Q

Can't find your address?

Primary usage

Commuter

▼

Commuter 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 ☐

2020 Toyota Camry LE ☒

Mary Smith

2018 Honda Civic SE ☐

2020 Toyota Camry LE ☐

Go back Continue

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

Select your coverages

✓ Drivers

✓ Vehicles

✓ Additional Questions

4 Coverages

5 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

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

Coverage level

\$50k per accident

Required



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

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

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.”

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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

Edit

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

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

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

MM/DD/YYYY

Your client's contact details

james.smith@email.com

555-555-5555

Enter your client's credit card information

Credit/Debit

Cardholder name

Card number

Expiration date

CVV

Zip code

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

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

Go back

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.

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Root Insurance

Close X



The policy has been purchased!

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.

Root

Questions?

Email us at agentsupport@joinroot.com