

Tips for success

Now that you have access to the Attune Portal, here are some tips to help you and your agency take advantage of our streamlined quote and bind process!

1. Try a quote, then try another

We've asked all our employees and customers for the best advice they have for getting started with Attune, and all of them said to quote a bunch the first week you have access. Here are a few quick videos that will walk you through the quote flow across our products:

- [Get a BOP and XS quote](#)
- [Get a WC quote](#)
- [Get a PL or GL quote](#)

2. Get familiar with the Attune Portal

At Attune, we understand the nuance of getting small-business insurance. That's why we took traditional underwriting knowledge and combined it with technology and data analytics to provide you with a seamless experience. Here are some features of our portal you should get familiar with:

How to reset your password

If you're new to Attune or forgot your password, you can do so directly through the Attune Portal. If you're confused or get stuck, [here's a walkthrough](#).

How to add users from your agency

Share the love. If someone at your agency will benefit from portal access, [you can add them in a few simple steps](#).

How to edit a quote

Directly through the Attune Portal, you can make changes such as updating limits in minutes. Here are the [steps you need to follow](#).

How to process and request BOP endorsement

You can process common endorsements like location address, additional insured, business name, and more directly through the portal. [Here's a quick video that will explain how easy it is](#).

3. Learn our appetite

No one wants to lose precious time figuring out if a client is the right fit. A great way to check if a business is eligible is by creating an account and entering the business type. Our portal will automatically tell you which of our products that business is eligible for. If you'd like to take a look at our Guidelines, you can click [here](#) to download the most recent versions.

4. Let us know if you're stuck

We're here to help. We know getting used to a new system can be difficult. If you have any questions or an urgent request, you can contact our team Monday through Friday from 9 a.m. to 6 p.m. ET at 1-888-530-4650 and via live chat in the [Attune Portal](#) or the [Help Center](#).