



Victor for Agents playbook

Simplify your business, amplify your returns



Contents

- 3. Victor for Agents overview
- 4. Register at victorinsurance.com
- 5. Navigate the Victor for Agents
- 10. Frequently Asked Questions
- 11. Customer Support

Victor for Agents reaffirms our commitment to agents with an intuitive user interface, fast return on quotes, end-to-end quote, bind and policy issuance, and access to multiple top insurance providers and competitive products.

Lucrative

Increase profitability through operational efficiency. Victor for Agents lets you quote, bind and issue in minutes.

Simple

Policy issuance has never been so easy. Enter your client's information into Victor for Agents once and get quote options for Business Owners Policies, Cyber, Flood, General Liability, Professional Liability, and Workers Comp.

Fast and flexible

Victor for Agents lets you work remotely and manage your new business anywhere, anytime.

Most small new business accounts require a few questions to obtain a quote. Quotes can then be bound instantly in Victor for Agents.

Superior coverage

- Business Owners Policies
- Cyber
- E&S General Liability and Property
- Flood
- General Liability
- Professional Liability
- Workers Comp (including high hazard)

Customer support

Contact our [sales team](#) via email/phone

Call (833) 423-0746

- Select Option #1 for service questions
- Select Option #2 for sales team

Use the Online Chat on victorforagents.com
Monday - Friday, 8:00 AM ET - 9:00 PM ET.

Top rated providers



**Let us help
you grow your
business**

Register at
victorinsurance.com
and start quoting!

Register at victorinsurance.com

New users

All Victor for Agents users must have their own username and password. Please follow the instructions below to create an account.

- Visit victorinsurance.com and select “log in/register.” Then select “Register.”
- Select “I am an insurance agent/broker.”
- Then select the second option “BOP, Cyber, E&S General Liability and Property, General Liability, Professional Liability, and/or Workers Comp for small businesses (available on Victor for Agents).”
- Answer the final question “Does anyone in your office have access to Victor for Agents” and complete the registration form.
- You will receive an email from the Victor Team if any additional information is needed.
- Once your agency license and E&O are validated, you will receive a Welcome email including your personal login details.

Returning users

- If you already have a Victor account, visit victorinsurance.com and select “log in/register” to start quoting!
- If you think you may already have a Victor account, but are having trouble logging in, email victorforagents@victorinsurance.com for assistance.

Registration or login questions?

Email victorforagents@victorinsurance.com



Navigate the Victor for Agents dashboard

Start a new quote.

Summary of all quotes, policies and written premium.

Learn what products are available for your clients by state.

Your to-do list.

Snapshot of recent activity including details on saved Quotes and Policies written. Click “See All Pending Quotes” for the full list.

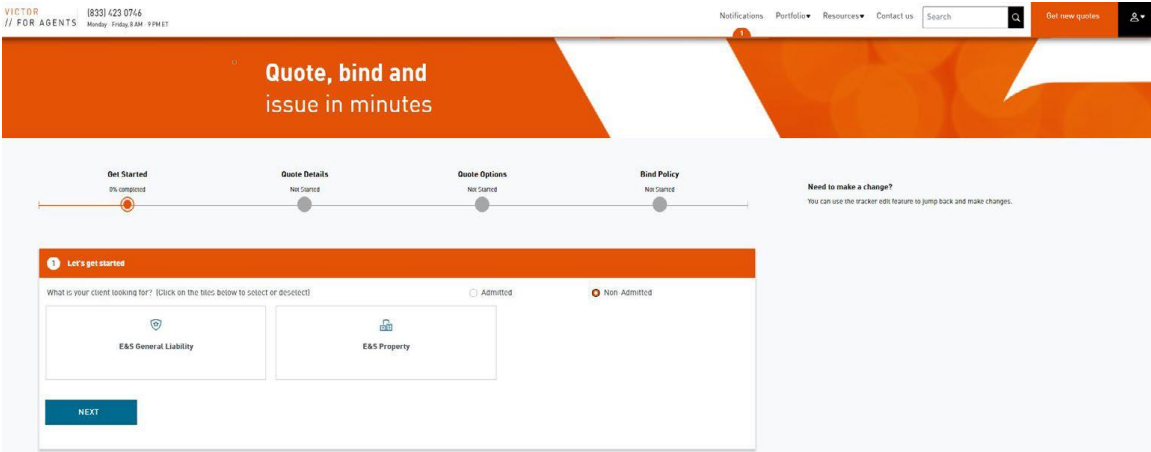
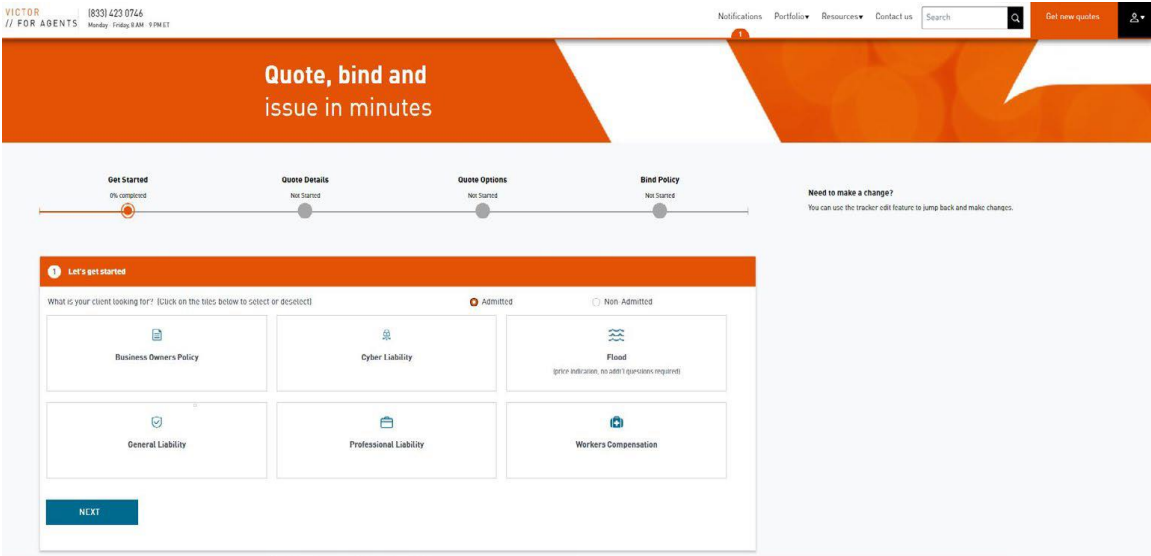
Use the online Chat Feature for immediate assistance.

The dashboard is titled "DOVETAIL // FOR AGENTS" with a phone number "(833) 423 0746" and a time zone "Monday - Friday, 8 AM - 9 PM ET". The top navigation bar includes "Notifications", "Portfolio", "Resources", "Contact us", a search bar, and a "Get new quotes" button. The main content area is divided into several sections:

- Get new quotes**: A prominent orange box with the text "Get quotes and policies for your clients in minutes." and a "START A NEW QUOTE" button.
- Quick summary**: A white box showing "Recent 90 day activity" with statistics: "962 accepted quotes", "338 policies sold", and "\$1,792,191.12 of total written premium". It includes a "VIEW MORE" link.
- Latest notifications**: A teal box showing "0 renewals offered" and "26 policies pending cancellation", with a "VIEW ALL" link.
- Recent Activity**: A section with tabs for "ACTIVE QUOTES" and "POLICIES SOLD". It contains a table with columns: CLIENT NAME, PROPOSAL #, LAST EDITED, LINE OF BUSINESS, and STATUS. The table lists three items, all with a status of "In Progress" and a "See All Pending Quotes" link.
- Product availability**: A section with a "SEE ALL PENDING QUOTES" button and a dropdown menu labeled "I'D LIKE TO FIND AVAILABLE PRODUCTS IN:" with the placeholder text "Enter a state to search".
- Find More**: A section with three cards: "READ NOTIFICATIONS" (with a shield icon), "CHECK RISK APPETITES" (with a checklist icon), and "FIND SAMPLE POLICIES" (with a person icon). Each card has a "DISCOVER MORE" or "LEARN MORE" link.
- Chat with us**: A button in the bottom right corner.

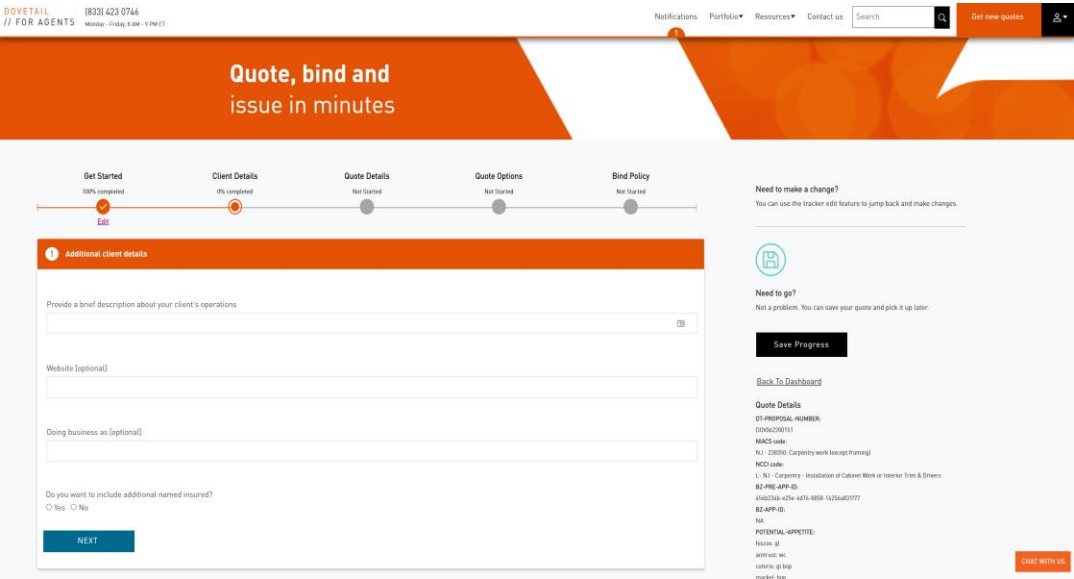
Start quoting

To get started, choose the coverages you want to quote (admitted or non-admitted) and enter basic agency information.



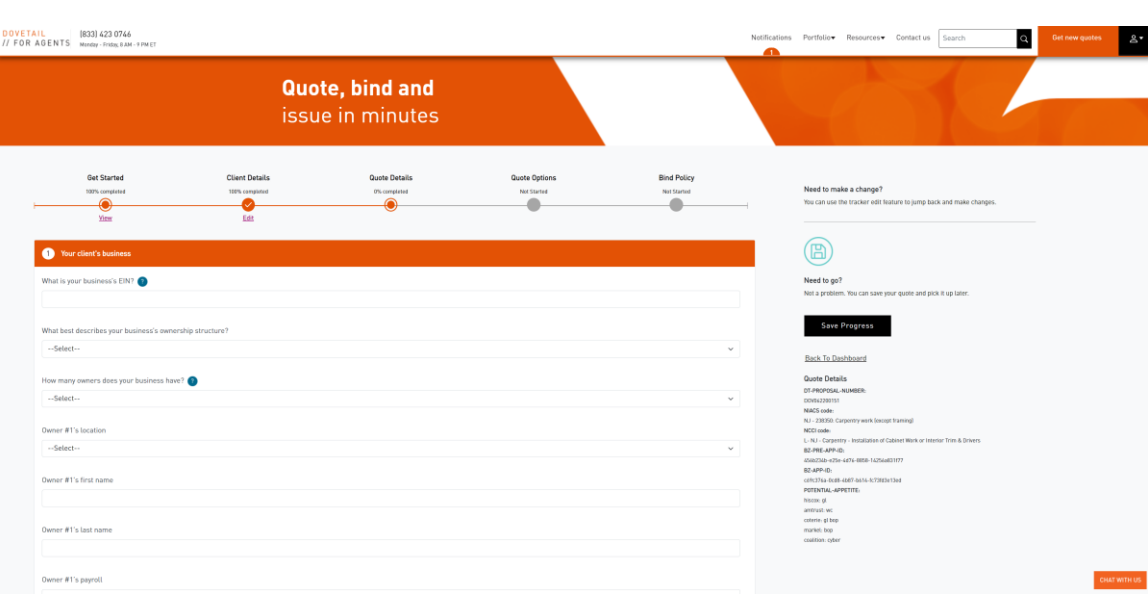
Enter client data

Next enter details including location and operations information.



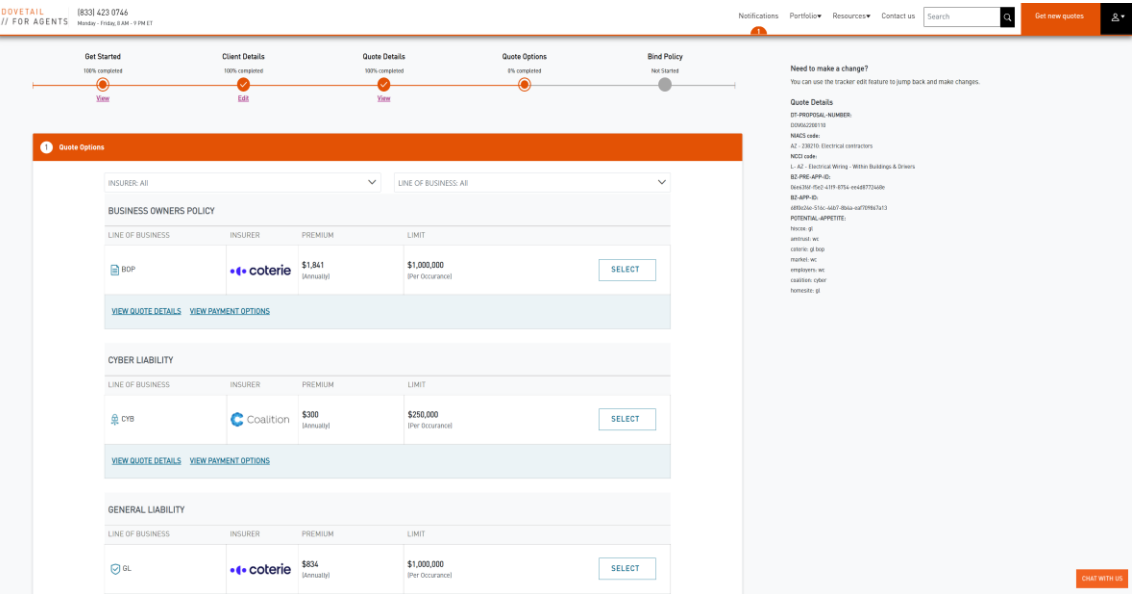
Enter quote details

Then policy details for all coverages you wish to quote including your client’s business, property, liability and optional coverages.



Review quote options

Next you will review and select the quote options.



You will also receive details on payment options and instructions.

DOVETAIL

// FOR AGENTS

(833) 423 0744

Monday - Friday, 9 AM - 5 PM ET

Notifications

Portfolio

Resources

Contact us

Search

Get new quotes

Quote, bind and issue in minutes

Get Started

100% completed

Next

Client Details

100% completed

Edit

Quote Details

100% completed

Edit

Quote Options

100% completed

Edit

Bind Policy

0% completed

Next

1 Select payment plan

YOUR CLIENT'S PAYMENT OPTIONS

Your client will need to make a down payment, then installments - unless they choose to make a full annual payment.

Select payment plan

DIRECT

PAYMENT FREQUENCY	DOWN PAYMENT	INSTALLMENT PAYMENTS
<input checked="" type="radio"/> Yearly	\$1,192	\$0
<input type="radio"/> Monthly	\$19.33	\$19.33

Need to make a change?

You can use the tracker edit feature to jump back and make changes.

Quote Details

25 PROPOSAL NUMBER: DOW04250070

NACS code: AZ - 031110 Floriss

NCS code: L - AZ - Silver Floriss - Retail

B2 FINE APP ID: 16375768-4048-4345-b610-af7f91a22985

B2 APP ID: c34e1f6f-4d9b-4763-9b30-4d549fa19d72

POTENTIAL APPEALS:

Intoxicant

amusement

concrete

market

modification

new

cyber

new

new

2 Payment Summary

CHAT WITH US

You're all set!

Your client covered.

DOVETAIL

// FOR AGENTS

[833] 423 0746

Monday - Friday, 8 AM - 5 PM ET

Notifications

Portfolio

Resources

Contact us

Search

Get new quotes

Congratulations!

Your client is covered

We've listed each policy issued below, along with the relevant policy documents for you to share with your client.

BOP #BOM0033512-01

Insured Name	test	Effective Date	03/17/2022
Type of insurance	BOP	Expiration Date	03/17/2023
Premium	\$0.00		

AGENT DETAILS

Agent Name	Ashutosh Aggarwal	agent_email	testuser18@gmail.com
Agent ID	99999999		

POLICY DOCUMENT

ADDITIONAL DOCUMENT

How to upload client documents

CHAT WITH US

Your portfolio

Select “Portfolio” and then “Policies” to review your policy documents.

The screenshot shows the 'Your Portfolio' page for VICTOR agents. The header includes the VICTOR logo, contact information, and navigation links. The 'Portfolio' link is circled in blue, and its dropdown menu is open, showing 'Overview', 'Quotes', and 'Policies'. The main content area has a blue header with the title 'Your Portfolio' and subtitle 'A top-level view'. Below this are three cards: 'Your Quotes' (orange icon), 'Your Policies' (teal icon), and 'Need Help?' (purple icon). Each card contains a list of items and a 'VIEW ALL' link. A 'CHAT WITH US' button is in the bottom right corner.

VICTOR
// FOR AGENTS (833) 423 0746
Monday - Friday, 9 AM - 9 PM ET

Notifications Portfolio Resources Contact us Search Get new quotes

Overview
Quotes
Policies

Your Portfolio

A top-level view

Your Quotes

Pick up saved quotes where you left off or check the status.

- 0 quotes to complete
- 0 accepted quotes
- 0 expired quotes

[VIEW ALL](#)

Your Policies

View your policies, renewals and pending cancellations.

- 0 renewals offered
- 0 active policies
- 0 policies pending cancellation

[VIEW ALL](#)

Need Help?

We're standing by ready to help. Contact us any time.

Email: info.smallbusiness@victorinsurance.com

Phone: (833) 423 0746 (M-F, 9 AM - 9 PM ET)

Live chat: M-F, 9 AM - 9 PM ET

CHAT WITH US

Broker resources

Select “Resources” to find specimen policies, appetite guides and the latest broker resources.

The screenshot shows the 'Resources' page for DOVETAIL agents. The header includes the DOVETAIL logo, contact information, and navigation links. The 'Resources' link is circled in blue, and its dropdown menu is open, showing 'Overview', 'Sample policies', 'Appetite', and 'Insights'. The main content area has a purple header with the title 'Resources' and subtitle 'Supporting your work'. Below this are three cards: 'Find specimen policies' (teal icon), 'Check risk appetites' (orange icon), and 'Our latest insights' (blue icon). Each card contains a brief description and a link. A 'CHAT WITH US' button is in the bottom right corner.

DOVETAIL
// FOR AGENTS (833) 423 0746
Monday - Friday, 9 AM - 9 PM ET

Notifications Portfolio Resources Contact us Search Get new quotes

Overview
Sample policies
Appetite
Insights

Resources

Supporting your work

Find specimen policies

Research coverage options to inform your advice to clients.

[FIND POLICIES](#)

Check risk appetites

Learn more about our many eligible classes of business by downloading our product appetite guides.

[CHECK APPETITES](#)

Our latest insights

Your knowledge is your success. Get our take on topics affecting you and your clients.

[VIEW ALL INSIGHTS](#)

CHAT WITH US

<https://qa.agents.victorinsurance.com/resources>

Frequently asked questions

General Victor for Agents questions

How do I log into Victor for Agents?

Visit victorinsurance.com and select "Login/register." Then enter your email address and password and click "Log in."

I am trying to reset my password but have not received the email with reset instructions. Please check your Spam/Junk folder. If you still do not see the password reset email, please email victorforagents@victorinsurance.com for further assistance.

I received an "invalid" error for the FEIN number I entered.

This is an indication that the risk has already been quoted through another distribution channel and the market has been blocked.

Where can I find the policy documents?

In the top Menu, select "Portfolio" and then "Policies" to find policy documents.

How does my client pay for the policy?

Payment requirements vary by provider. Please click [here](#) for additional information on billing options and requirements.

How do I update my agency's E&O renewal?

Email a copy of your agency's updated E&O renewal declaration page to compliance@victorforagents.com or [submit online](#).





Customer support

General Victor questions

Call (833) 423-0746 or email info.smallbusiness@victorinsurance.com

Technical questions

Online Chat in Victor for Agents available Monday-Friday from 8:00 AM ET – 9:00 AM ET

If you experience issues logging in, email victorforagents@victorinsurance.com

If are a first-time user, visit victorinsurance.com and select “Log in/register” to create a Victor account.

How do I report issues with Victor for Agents?

Please email as much information as possible to victorforagents@victorinsurance.com

including:

- Date/time of error
- Login ID
- Which browser you are using
- Screenshot of error message

If possible, please attempt to access the site from another computer before contacting the support team. If you are able to access Victor for Agents from another computer with no issues, this indicated there may be an issue with your computer and connection.



Visit us at victorinsurance.com to learn more.

This document is for illustrative purposes only and is not a contract. It is intended to provide a general overview of the program described. Please remember only the insurance policy can give actual terms, coverage, amounts, conditions and exclusions. Program availability and coverage are subject to individual underwriting criteria.

Victor Insurance Services LLC in MN | DBA in CA and NY: Victor Insurance Services | CA Ins. Lic. #0156109