



## Navigating your AgencyRoot Producer Toolbox

This user guide will help you understand your AgencyRoot Producer Toolbox.

Your agent has partnered with AgencyRoot and given you access to this toolbox for ease of managing and viewing your crop insurance information.

- ❖ Invitation and Set up to your Producer Toolbox
- ❖ Home Page
  - Policies
  - Claims
  - Risk Matrix
  - Policy Documents (Coming Soon)
- ❖ My Documents (Coming Soon)
- ❖ Apps
  - Risk Matrix
  - CountyPro
  - DairyPro
  - LivestockPro
- ❖ Help



## 1) Invitation & Set up to your Producer Toolbox

### a. Invitation to your Toolbox

- i. Your agent will invite you to your Toolbox via email.
- ii. You will receive an email from [support@agencyroot.com](mailto:support@agencyroot.com)



## Invitation to AgencyRoot

Your crop insurance agent, Travis Laine with Demo Agency, has invited you to use AgencyRoot's risk management tools. Please click the link below to create your free account.

Create Account

### b. Set up for your Toolbox

- i. Select Create account
- ii. Elect your password
- iii. Once you follow the invitation steps to elect a password you will be automatically logged onto the Toolbox
- iv. To log in after this initial set up please visit <https://agencyroot.com/app/#/login>
  1. Enter your username (email) and password
- v. To reset your password, select the Reset password link on the log in page or email [support@agencyroot.com](mailto:support@agencyroot.com)
- vi. <https://app.agencyroot.com/app/#/resetpassword>

## 2) Home Page

Once logged onto your Toolbox you will be on your Home Dashboard. On the Left side you will see 3 Menu items that will help you navigate to certain features of the Toolbox

- i. Home – takes you back to your primary home page
  - ii. Documents – (Coming Soon) will take you to your Document page where your agent can share documents like your Schedule of Insurance, 578 copy, Claim paperwork, etc.
  - iii. Apps – here you will find helpful policy decision making tools like a Risk Matrix – Profitability assessment, CountyPro – SCO/ECO historical tool DairyPro – DRP insurance quoter, LivestockPro – LRP insurance quoter.
- a. Policies
- iv. A list of all your personal, entity, or connected policies will be displayed on the Home page.

The screenshot shows the AgencyRoot Producer Toolbox interface. At the top, there is a green header with the AgencyRoot logo. Below the header, there is a sidebar with navigation icons. The main content area is titled "Producer Toolbox" and contains a "Policies" section with a "Most Recent" dropdown menu. The policies are listed in a table with columns for RY, County, Type, Policy Number, and Company. The first three rows are for 2022 policies in Vermillion, IL (Soybeans), Warren, IN (Whole Farm Revenue Protection), and Warren, IN (Soybeans). The fourth row is for a Demo Rancher policy in Madison, KY (Pasture, Rangeland, Forage). A "Risk Matrix" section is visible below the policies, with an "Access" button. A green callout box on the right states: "Your agent has given you access to this account for ease of managing your crop insurance information. Please check back regularly for new tools and information as it becomes available."

RY	County	Type	Policy Number	Company
2022	Vermillion, IL Soybeans	MPCI (S)	1145488	GA
2022	Warren, IN Whole Farm Revenue Protection	MPCI (S)	1146202	GA
2022	Warren, IN Soybeans	MPCI (S)	1145490	GA
Demo Rancher				
RY	County	Type	Policy Number	Company
2022	Madison, KY Pasture, Rangeland, Forage	MPCI (F)	1148776	GA

- v. You will have access to the Reinsurance Year (RY) policies your agent also has access to in the AgencyRoot system.
- vi. Policies can include your Personal policies, Entity policies you are the owner of, or policies your Agent linked you to; an example of this would be if you are the Farm Manager/Power of Attorney for your other family member's farms.
- vii. To view the policy details, select the Blue policy number or the 3dot actions button and "View Policy"

This screenshot is identical to the one above, but with a green box highlighting the "Policy Number" column in the table. The highlighted values are 1145488, 1146202, 1145490, and 1148776.

- viii. Once on your Policy Detail Page you can identify items like:
  1. Status
  2. Insurance Provider
  3. RY
  4. Total Acres
  5. Total Premium

6. Producer Premium (please note additional administrative costs and/or fees are not included in this premium representation. Nor is any billing calculated on this feature – Please consult with your agent for final billing and billing due).
7. Total Indemnity Amount (please note final indemnity amounts should be verified by your agent).

Donald House / MPCl Policy #1145490 ☰

Status	Insurance Provider	RY	Total Acres	557.8
In Effect	GA	2020	Total Premium	\$1,092
			Producer Premium <span>📈</span>	\$218
			Indemnity Amount <span>📈</span>	\$1,391

ix. Coverages Tab

- a. Use the Green arrow to expand the Coverage Details section.

AgencyRoot  
Demo Rancher / MPCl Policy #1148776 ☰

Status	Insurance Provider	RY	Total Acres	731.5
In Effect	GA	2022	Total Premium	\$5,718
			Producer Premium <span>📈</span>	\$2,571
			Indemnity Amount <span>📈</span>	\$0

Coverages Claims

County	Crop	Plan	Coverage	Quantity	Total Premium	Producer Premium
Madison, KY	Pasture,Rangeland,Forage Grazing	RI	85% 152%	500.00 reported ac.	\$4,670	\$2,100
Grid: 21194		Irrigation: Organic:		-		
Intended Use: Grazing						
Coverage	Percent Value	Insured Acres	Status	Rainfall	Grid Index	Indemnity
Mar - Apr Index Interval	20%	23.62 100% share	Estimated	4.70' cur. 8.52' avg.	55.1%	\$740 <span>📈</span>
May - Jun Index Interval	30%	35.42 100% share	Estimated	4.32' cur. 6.98' avg.	48.1%	\$1,372 <span>📈</span>
Jul - Aug Index Interval	30%	35.42 100% share	Future			

x. Claims

1. If you have a Closed / Paid claim the Toolbox will highlight County/State, Stage, Crop, Damage Cause, Indemnity, as well as Cause and Date, and Details.

Coverages Claims

Claim Number #1047530  
Claim Total \$5,638 📈

County/State	Stage	Crop	Damage Cause	Indemnity
Madison, KY	Final Loss - ARPI/SCO/STAX/MP/HIP-WI Crops Only	Pasture,Rangeland,Forage	ARPI/SCO/STAX/MP Crops Only	\$5,638

Cause of Damage: ARPI/SCO/STAX/MP Crops Only  
Date: Aug 31, 2021

Details

Claim Number #1056588  
Claim Total \$1,097 📈

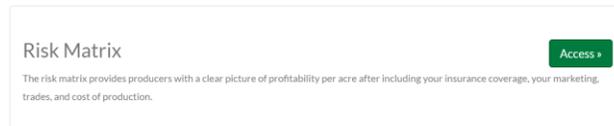
County/State	Stage	Crop	Damage Cause	Indemnity
Madison, KY	Final Loss - ARPI/SCO/STAX/MP/HIP-WI Crops Only	Pasture,Rangeland,Forage	ARPI/SCO/STAX/MP Crops Only	\$1,097

## b. Risk Matrix

The Risk Matrix provides producers with a clear picture of profitability per acres after including your insurance coverage, your marketing, trades, and cost of production.

Your crop agent can take you through the optional coverage offerings to help you decide the best policy for your operation.

Select Access to enter the Risk Matrix



## 3) My Documents (Coming Soon)

This will be the future home for policy documents that your insurance agent has given you access to. Documents could include Schedule of Insurance, copy of your Production report, 578s, etc.

## 4) Apps

Under your Apps Menu item, you can select links to your Risk Matrix \*See Risk Matrix description above\*, CountyPro, as well as quoting tools for Dairy and Livestock policies.

### a. CountyPro

- i. Using CountyPro you and your agent can help you decide if SCO 75-86%, ECO 86-90%, or ECO 86-95% should be added to your policy. The History table allows you to see Historical performance of SCO/ECO. The History Chart allows you to see yield trends. The SCO / ECO Visual allows you to see how SCO / ECO looks stacked on top of your RP base coverage.

### b. DairyPro

- i. Your agent can help you decide the best options for your Dairy operation and utilizing DairyPro together can help you better understand the best Quarter and options to select.
- ii. Please note you cannot bind coverage or purchase a policy on the DairyPro quoting tool.

### c. LivestockPro

- i. Your agent can help you decide the best options for your Livestock operation and utilizing LivestockPro together can help you better understand the best Market Price Endorsement to elect.
- ii. Please note you cannot bind coverage or purchase a policy on the LivestockPro quoting tool.

## 5) Help

An AgencyRoot representative is a simple click away using our chat feature. If you are experiencing any Toolbox issues, please select the help icon and a team member will be right with you.

Please also use [support@agencyroot.com](mailto:support@agencyroot.com) if you need to email an AgencyRoot team member.

Please note; if you have a policy, billing, claims, coverage question you will need to direct that to your agent listed below:

Agent Name: Nathan Pitts or Veronica Sauder

Email: [nate.pitts@terrafinacialinc.com](mailto:nate.pitts@terrafinacialinc.com) or [veronica.sauder@terrafinacialin.com](mailto:veronica.sauder@terrafinacialin.com)

Office Phone: 620-747-2924 or 620-869-1206

Mobile Phone:

Address: