

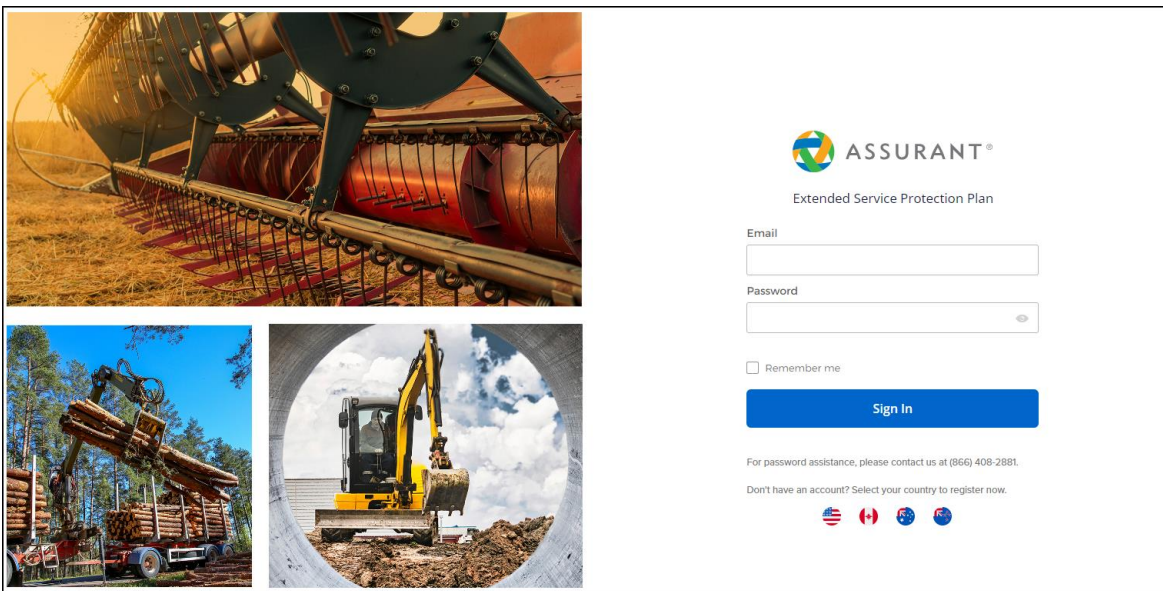


Assurant Extended Service Protection Plan Website Reference Guide

This sheet is intended to provide an overview on the Assurant Commercial Equipment website. If you have any questions not addressed by this sheet, please don't hesitate to reach out to us at EPG_sales@assurant.com or (866) 408-2881.

How to access the Assurant Commercial Equipment website

1. Go to ESPP.EPGIns.com.
2. To login, enter the email address and password associated with your account.
3. To create an account, click the *flag* link below the login fields, complete the requested information and submit the user registration form. Once your account is set up, you will receive an email notification that you are ready to login.
 - Note, login credentials for the espp.epgins.com website will not work.
 - If you are a warranty administrator that manages ESPP quotes, applications or claims on behalf of multiple locations, or need access to see ESPP information throughout your dealer organization, please reach out to us at EPG_sales@assurant.com or (866) 408-2881 to have the appropriate settings applied to your account.

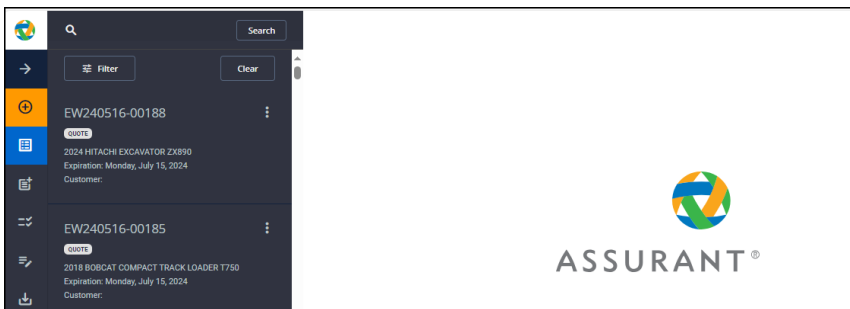


What are the Options in the Navigator Menu

There are 5 different sections of the Assurant ESPP system:

1. Quotes- Where quotes can be generated and saved quotes can be viewed.
2. Applications- A list of all submitted & unprocessed applications.
3. Processed- A list of all applications processed applications and where coverage details can be viewed.
4. Claims- Where claims can be generated and submitted claims can be viewed.
5. Documents- Where ESPP program reference materials- such as sample terms and conditions, master parts schedules, and guides- can be viewed and downloaded.

If you don't see the navigation menu on the left part of the screen, click the arrow in the top left corner of the screen to make it appear.

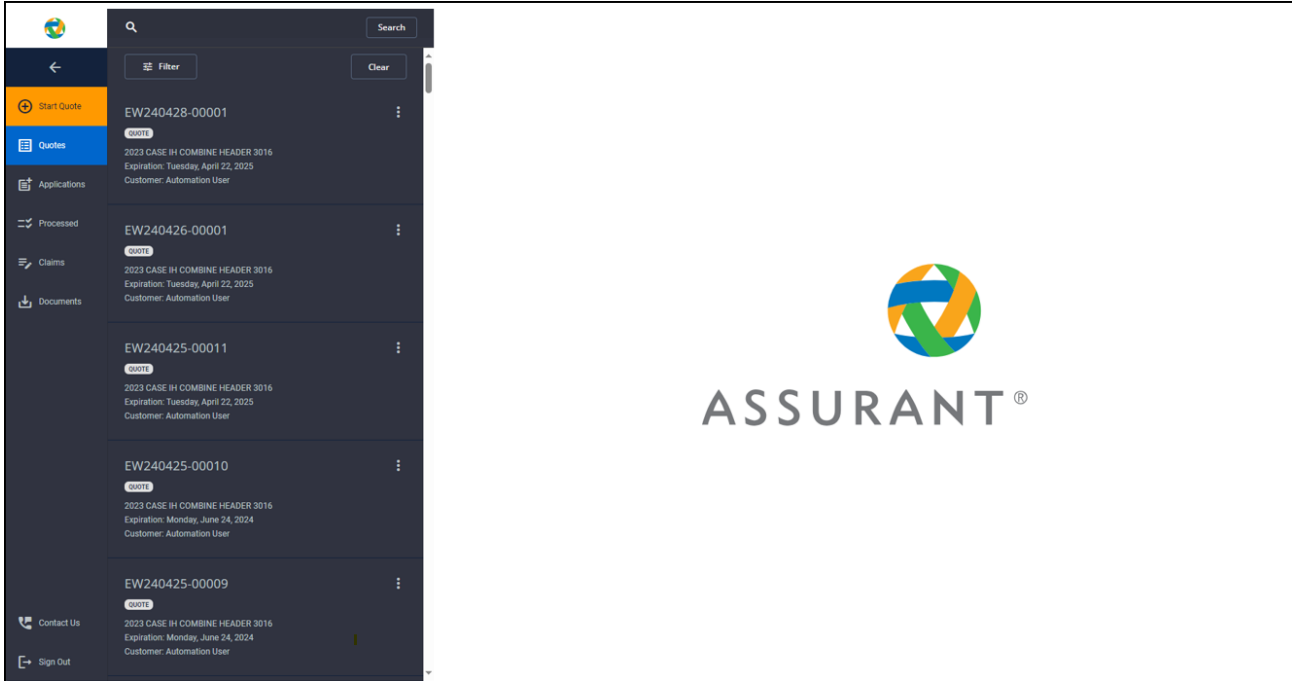




Assurant Extended Service Protection Plan Website Reference Guide

How to Start a Quote

1. Click *Quotes* in the navigation menu.
2. Click on the *Start Quote* button at the top of the navigation bar.



3. The quote details window will open. Enter the customer's name (not required) and select the Quote Type to be generate. Complete all required fields and click Generate Quote. Although there are other quote type options in the menu, New and Used quotes are the only options available for quoting online at this time. Please contact us at EPG_sales@assurant.com or (866) 408-2881 for assistance with any other quote needs.

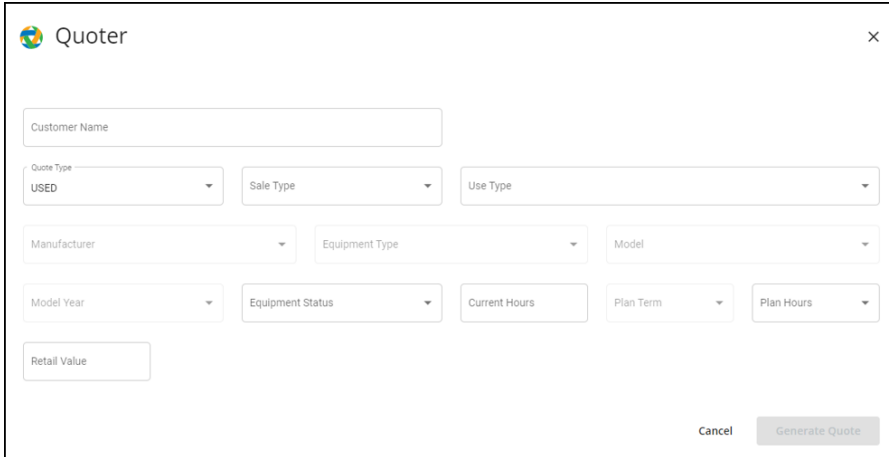
- New quotes are for machines still within the MFR's full machine standard warranty period. The Warranty Date and Retail Value fields are not required to generate a quote but are recommended if known as they are required to proceed to the application form.

A screenshot of the 'Quoter' form, which is a modal window with a white background and a dark blue header. The header contains the Assurant logo and the word 'Quoter' in a bold, sans-serif font. The form itself is a grid of input fields. It starts with a 'Customer Name' text field. Below that are three dropdown menus: 'Quote Type' (set to 'NEW'), 'Sale Type', and 'Use Type'. The next row contains three more dropdown menus: 'Manufacturer', 'Equipment Type', and 'Model'. The following row has four fields: 'Model Year' (dropdown), 'Standard Warranty Start Date' (calendar icon), 'Warranty Expiration Date' (calendar icon), and 'Warranty Term' (dropdown). The final row contains four fields: 'Current Hours' (text), 'Plan Term' (dropdown), 'Plan Hours' (dropdown), and 'Retail Value' (text). At the bottom right of the form are two buttons: 'Cancel' and 'Generate Quote'.



Assurant Extended Service Protection Plan Website Reference Guide

- Used quotes are for machines that are outside of the MFR's standard or extended warranty periods and have no ESPP coverage. The Retail Value field is not required to generate a quote.



The Quoter form is a web-based interface for generating quotes. It includes the following fields and controls:

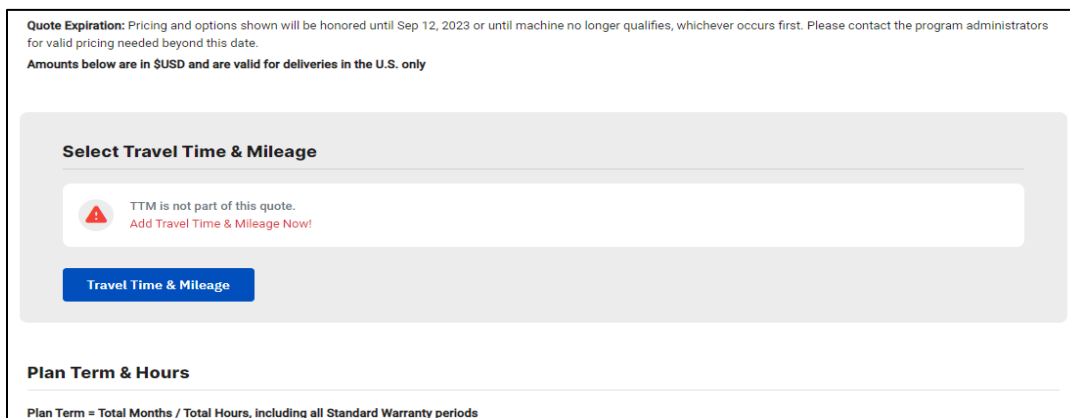
- Customer Name:** A text input field.
- Quote Type:** A dropdown menu with "USED" selected.
- Sale Type:** A dropdown menu.
- Use Type:** A dropdown menu.
- Manufacturer:** A dropdown menu.
- Equipment Type:** A dropdown menu.
- Model:** A dropdown menu.
- Model Year:** A dropdown menu.
- Equipment Status:** A dropdown menu.
- Current Hours:** A text input field.
- Plan Term:** A dropdown menu.
- Plan Hours:** A dropdown menu.
- Retail Value:** A text input field.
- Buttons:** "Cancel" and "Generate Quote".

- Extend the Extended quotes are for machines that are in the extended warranty or ESPP coverage period and need additional coverage. This quote cannot be generated online at this time.

4. Once you click *Generate Quote*, the quote details will be displayed in the preview window and the quote will show in the quote history list. All quotes generated within a dealership will show in the quote history list and will be searchable by other users assigned to the same dealership.

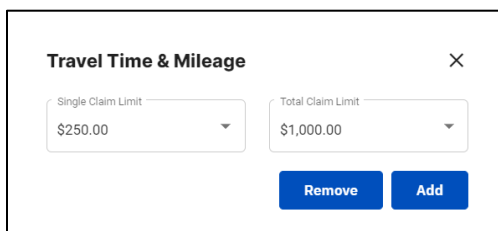
How to Add Travel Time & Mileage (TTM) to a Quote

- TTM can be added once the quote has been generated by clicking the *Travel Time & Mileage* button above the plan options list.
- When the TTM selection window opens, select the desired Single Claim Limit and Total Claim Limit.
 - The Single Claim Limit is the maximum TTM amount that will be paid per claim.
 - The Total Claim Limit is the maximum TTM amount that will be paid for all claims made under the Plan.
- Note anytime an existing quote is edited or modified, TTM is removed and must be added back to the quote.



This window displays the "Select Travel Time & Mileage" section. It includes the following information:

- Quote Expiration:** Pricing and options shown will be honored until Sep 12, 2023 or until machine no longer qualifies, whichever occurs first. Please contact the program administrators for valid pricing needed beyond this date.
- Amounts below are in \$USD and are valid for deliveries in the U.S. only**
- Select Travel Time & Mileage:** A section with a warning icon and text: "TTM is not part of this quote. Add Travel Time & Mileage Now!". Below this is a blue button labeled "Travel Time & Mileage".
- Plan Term & Hours:** A section with a text input field for "Plan Term = Total Months / Total Hours, including all Standard Warranty periods".



This window displays the "Travel Time & Mileage" selection options. It includes the following fields and controls:

- Single Claim Limit:** A dropdown menu with "\$250.00" selected.
- Total Claim Limit:** A dropdown menu with "\$1,000.00" selected.
- Buttons:** "Remove" and "Add".



Assurant Extended Service Protection Plan Website Reference Guide

How to Add a Dealer Mark-Up to a Quote

There are 2 ways to add a dealer mark-up to a quote- via the calculator or manually. The options can be used in combination or independently of each other. Using the mark-up calculator will apply a mark up to all coverage options and will overwrite any manual mark-ups that have been applied previously.

- *Using the Dealer Mark-Up Calculator:*

1. Select the mark up type- Percentage or Flat Fee
2. Enter the mark up amount; decimals are not allowed or accepted, so enter the value as a whole amount (e.g. 5, 12, 20, etc)
3. Once both a mark-up type and amount are populated, the Dealer Mark-Up and Customer Totals displayed in the quote will update to reflect the applicable amounts.

Plan Term, Hours & Dealer Mark-Up

Plan Term = Total Months / Total Hours, including all Standard Warranty periods

Plan Term: 36 / 3000

Dealer Mark-Up

Type: Percent Amount (No Decimal): 10 %

Plan Options

Select the coverage type that you want to purchase and click Apply Now.

☐	PREMIER	Service Fee \$0.00	Dealer Total \$730.00	Dealer Mark-Up \$73.00	Customer Total \$ 803
☐	PT+H	Service Fee \$0.00	Dealer Total \$500.00	Dealer Mark-Up \$50.00	Customer Total \$ 550
☐	PT	Service Fee \$0.00	Dealer Total \$380.00	Dealer Mark-Up \$38.00	Customer Total \$ 418

- *Manually updating the Customer Total:*

1. Click in the Customer Total for the Plan Option to be modified.
2. Populate the desired total cost to be charged to the customer for the coverage option.
3. The Dealer Mark-Up field will be updated based on the Customer Total populated.

Plan Options

Select the coverage type that you want to purchase and click Apply Now.

☐	PREMIER	Service Fee \$0.00	Dealer Total \$730.00	Dealer Mark-Up \$70.00	Customer Total \$ 800
☐	PT+H	Service Fee \$0.00	Dealer Total \$500.00	Dealer Mark-Up \$50.00	Customer Total \$ 550
☐	PT	Service Fee \$0.00	Dealer Total \$380.00	Dealer Mark-Up \$40.00	Customer Total \$ 420

How to Print Dealer Quotes

1. View the quote.
2. Click the page icon at the top right-hand corner of the screen.

Quote # EW230906-00038



Edit Quote

3. When the new window loads, you will have the option to download and save or print a copy of the quote. It will include all the same cost fields that are displayed in the web quote screen.



Assurant Extended Service Protection Plan Website Reference Guide

How to Print Customer Quotes

1. View the quote.
2. Ensure the correct Dealer Mark-Up has been applied or correct Customer Total is populated for each of the coverage options.
3. Click the down arrow at the top right-hand corner of the screen to create the Customer Copy of the quote.

Quote # EW230906-00038

Edit Quote

4. When the new window loads, you will have the option to download and save or print a copy of the quote.

How to View and Delete Saved Quotes

1. Click *Quotes* in the navigation bar.
2. To view a saved quote:
 - scroll through the quote history list until you located the desired quote. Click on the quote in the history list to load it to the viewing window; OR
 - enter the quote number or customer name in the search field at the top of the history list and click *Search*.
3. To delete a quote, click ellipsis menu (3 vertical dots) for the desired quote number. When the menu window opens, select delete quote.

How to Edit Quotes

1. View the quote.
2. To edit the quoted term and hours, use the Plan Term drop down menu to select the desired term / hours option.

Quote Expiration: Pricing and options shown will be honored until Sep 12, 2023 or until machine no longer qualifies, whichever occurs first. Please contact the program administrators for valid pricing needed beyond this date.
Amounts below are in USD and are valid for deliveries in the U.S. only

Select Travel Time & Mileage

TTM is not part of this quote.
Add Travel Time & Mileage Now!

Travel Time & Mileage

Plan Term & Hours

Plan Term = Total Months / Total Hours, including all Standard Warranty periods

Plan Term
36 / 3000

3. To edit any other information about the quote, select the *Edit Quote* button at the top of the quote screen, update the quote details accordingly and select *Update Quote*.

Quote # EW230714-00068

Edit Quote

4. If TTM was on the quote, it will need to be added back once the quote has been updated.

How to Purchase Coverage

1. View the quote.
2. Ensure the amount being charged to the customer for the coverage is accurately entered in the customer total field.
3. Select the coverage desired and click the Apply Now button.



Assurant Extended Service Protection Plan Website Reference Guide

Plan Options

Select the coverage type that you want to purchase and click Apply Now.

☒	PREMIER	Service Fee \$0.00	Dealer Total \$1,745.00	Dealer Mark-Up \$155.00	Customer Total \$ 1,900
☐	PT+H	Service Fee \$0.00	Dealer Total \$1,255.00	Dealer Mark-Up \$0.00	Customer Total \$ 1,255
☐	PT	Service Fee \$0.00	Dealer Total \$1,020.00	Dealer Mark-Up \$0.00	Customer Total \$ 1,020

[Apply Now](#)

- The application form will then load; review populated fields to ensure accuracy, complete all required fields and click *Submit Application* to purchase coverage.
 - Ensure all email addresses that should receive paperwork are included in the Dealer Information section. The user who generated the quote will be listed; use the + button to add additional contacts.

Dealer Information

PO #	Dealer Contact User Name	Dealer Phone 111-111-1111	Dealer Contact Email useremail@email.com
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[+](#)

- Use the comments field under the Equipment Information section to add any notes or special instructions.

How to File a Claim

- Click *Claims* in the navigation menu.
- Click *Start Claim* button at the top of the navigation menu.

The screenshot shows the Assurant website interface. On the left is a dark navigation menu with a 'Start Claim' button at the top. The main content area on the right features the Assurant logo and the word 'ASSURANT' in large, bold letters.

- Enter the serial number of the unit which requires a claim and click *Search*. The system requires a minimum of 4 characters to look for possible plans that have a matching serial number.

Start Claim

Serial Number

[Search](#)



Assurant Extended Service Protection Plan Website Reference Guide

- Click *Open Claim* for the plan the claim is to be filed under. The system will provide a list of all possible matches for the entered serial number.

Start Claim

Serial Number
Test X

Open Claim

Serial Number: TESTEPG123
Plan Number: 14TT1200000
Equipment: 2014 ROSCOE RB48A BROOM
Coverage: PREMIER
Effective Dates: Aug 8, 2014 - Aug 8, 2030

Open Claim

Serial Number: TESTVOLV0123
Plan Number: 14TT1200001
Equipment: 2013 VOLVO EC140 CRAWLER EXCAVATOR
Coverage: POWERTRAIN
Effective Dates: Aug 8, 2014 - Aug 8, 2030

- Complete all the required fields in the claim form including the repairing location address.
 - If claim payments should be mailed to an address other than the repairing location, please be sure to contact the claims department at EPG_esppclaims@assurant.com to ensure this information is on file.
- Attach any necessary files to support the claim.
 - Click the *Attach Files* button at the bottom of the claims form.
 - Click *Select Files* button.
 - In the browse window that opens, find and select the needed files; click *Open*.
 - Click *Upload* to attach the files.
 - All files that have been attached will show in the Attached Files section of the claim form. Should you need to submit files after a claim has been filed, please reach out to the claims department at EPG_esppclaims@assurant.com for direction.

File Upload

Select the file(s) that you would like to upload for this claim.

Select Files

Accepted file types: .jpg, .jpeg, .png, .pdf, .helic, .xls, .xlsx, .doc, .docx, .txt, .csv, .mp4

All supporting documentation, such as the sublet invoice, failure photos, and maintenance records (when required), should be attached in order for the claim to be processed.

Cancel Upload

Attach Files

All supporting documentation, such as the sublet invoice, failure photos, and maintenance records (when required), should be attached in order for the claim to be processed.

Attached Files

- Scroll to the top of the claim form and select *Submit Claim*.

How to Print a Copy of a Claim

Only users who are part of the dealership that filed the claim can print a copy of the submitted and finalized claim.

- Click on the ellipsis menu (3 vertical dots) next to the web claim number in the history or search results list.
- Select the Submitted Claim or Final Claim option.



Assurant Extended Service Protection Plan Website Reference Guide

How to Look Up Coverage

1. Click *Processed* in the navigation bar.
2. When the history list loads, enter the serial number, quote #, customer name, or plan number in the search menu and hit *Search*.
3. To view the coverage details, click on the search results. The coverage documents are viewable by clicking the T&C and MPS links in the coverage summary screen.
4. To clear the search results, or to start a new search, click *Reset*.

How to Look Up a Claim

1. Click *Claims* in the navigation bar.
2. Enter the serial number, work order number, web claim number (RR #), or customer name in the search menu and hit *Search*.
3. To clear the search results, or to start a new search, simply click *Reset*.