

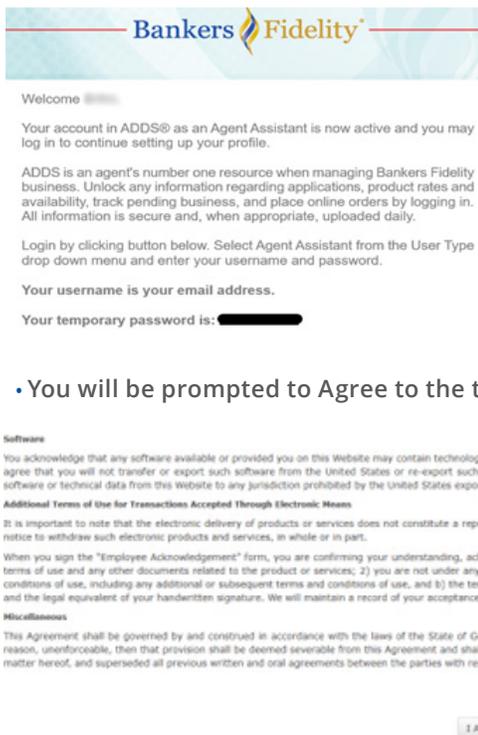
This guide is designed to walk you through the process of setting up your Agent Assistant profile and retrieving policy data reports from the portal.

Step 1: Activate Your Agent Assistant Profile

You will receive a welcome email with a link to begin setting up your profile.

- Use the temporary password provided in the email to log in.
- Upon logging in, you'll be prompted to:
 - Create a new password
 - Select a security question

Note: Your email address will be your user ID.



- You will be prompted to Agree to the terms of usage.

Software

You acknowledge that any software available or provided you on this Website may contain technology that is subject to strict controls by various agencies of the United States that you will not transfer or export such software from the United States or re-export such software outside the United States in violation of United States software or technical data from this Website to any jurisdiction prohibited by the United States export controls laws and regulations.

Additional Terms of Use for Transactions Accepted Through Electronic Means

It is important to note that the electronic delivery of products or services does not constitute a representation or warranty that such products or services will be available to withdraw such electronic products and services, in whole or in part.

When you sign the "Employee Acknowledgement" form, you are confirming your understanding, acknowledgement, and acceptance, that: 1) you can view and, if so terms of use and any other documents related to the product or services; 2) you are not under any legal incapacity or incompetence which would prevent you from conditions of use, including any additional or subsequent terms and conditions of use; and b) the terms and conditions relating to the specific product or service, or of and the legal equivalent of your handwritten signature. We will maintain a record of your acceptance.

Miscellaneous

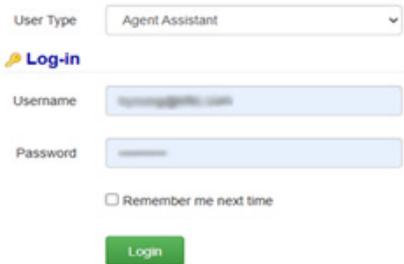
This Agreement shall be governed by and construed in accordance with the laws of the State of Georgia, United States of America, without giving effect to any prior reason, unenforceable, then that provision shall be deemed severable from this Agreement and shall not affect the validity and enforceability of any remaining provisions hereof, and superseded all previous written and oral agreements between the parties with respect to such subject matter.

- Completing these steps will activate your Agent Assistant account.

Guide

Step 2: Log In to the Portal

- Go to the portal using the link provided in your email: [Agent Portal Login](#)
- Select your **User Type** as “Agent Assistant”.
- Enter your email and the password you just created to log in.

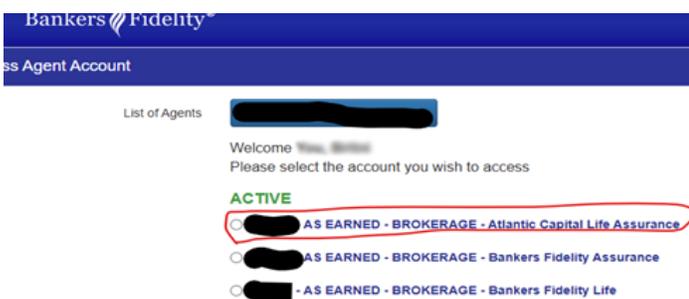


Step 3: Select the Agent and Writing Number

- Once logged in, select the agents/agency name from the drop-down menu.



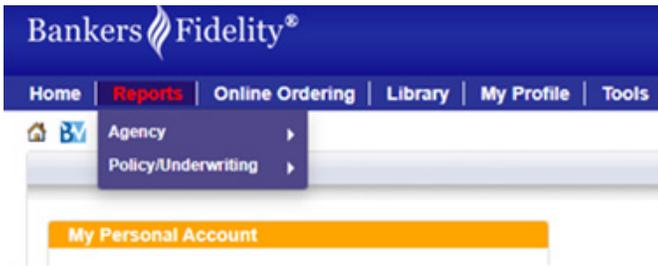
- Then choose **one writing number** associated with that agent/agency name.



- **Note:** You only need to select one writing number. All associated policies will populate under that account—there’s no need to toggle between multiple profiles.

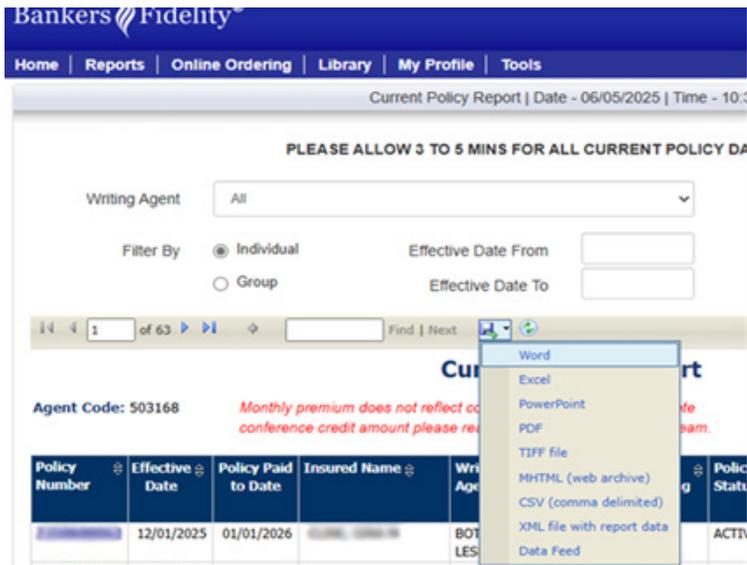
Step 4: Generate the Policy Report

- Navigate to the Reports tab.
- Under Policy/Underwriting, select “Current Policy Report”.
- The system will generate the full report.



Step 5: Download the Report

- Click the “Export drop down menu” (save/disk icon).
- A dropdown menu will appear with multiple file format options.
- Select the format that best suits your needs to download the report.



Step 6: Save and Review the Report

- Save the downloaded file to your computer.
- The report is now ready for review, analysis, or sharing as needed.