Anchor & General Insurance Agency, Inc.

## First Time Password Set Up for Diamond

We are excited to present to you our new system, Diamond from InsureSoft. This new system offers you a whole new experience in quoting, binding, processing payments, endorsements, and managing signatures. First, you will need to setup a new password, which is different from your current Anchor password.

- 1. Password must be created by the person who is in charge of passwords BEFORE bridging any policies.
- 2. Go to Producer's link: https://get.policyexpress.com

\*\*Bookmark or add as Favorite this link on your browser. Use this link to service and/or view Anchor policies.

- 3. Use Your Current Anchor Login.
- 4. Use temporary password: Anchor1234!

Login: Your Current Anchor Login Password: Anchor1234! Forgot Password? Change Password? Change Password?
Clear LOGIN v538.008.4300-89

- 5. After logging in with the temporary password, it will prompt you to create your own password.
- 6. Your password requires a minimum of ten characters, one lower case character, one upper case character, one number, and one symbol minimum.

The user password	must be changed.
Login:	Your Current Anchor Login
Current Password:	Anchor1234!
New Password:	
Confirm Password:	
Login Failed: Pa	ssword must be changed.
CANCI	LOGIN
v5:	38.008.4300-89

- 7. Re-enter the temporary password; enter your new password.
- 8. Confirm your new password by selecting login.

9. After clicking login, you will be on the home page.

Anchor 🔀 Gen	IERAL							Wencome Fouria	Logout Contact User: v538.008.4300- System Date: 10/23/20
Home Client Policies Quote Tas	ks Resour	ces Repor	ts Contact	Us				Policy or Claim Number	- Q 🗆
Dullas a				Daily	Action Items				
Make Payment	E-Signature	e Outstanding (	(0)					$\odot$	
Policy Search Recent Quotes	Remote E-	-Sign Pending (	0)					$\odot$	
Message Center ( view all )	Policy	LOB	Name	Address	Effective Date	Expiration Date	Status	Premium	
				ľ	lo data to display				
	No data te	o paginate						Page size: 5	
	Remote E-	-Sign Pending V	With Payment O	utstanding (0)					
	Policies Per	nding Cancellat	tion (2)						
	Recently Ca	ancelled Policie	s (11)					•	
	Renewals (	0)						•	
	New Busine	ess Policies (0)						•	
	Recent End	lorsements (0)							
	New Claim	c within 30 day	s (0)					<b>A</b>	

Close Browser and Login again to make sure the password was successful. Very Important!



## Next Step: Setting Up Credentials in FSC Raters

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FSC Rater FRE	E Upgrade	Automobile	Homeowners	Renters
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A. After logging in to the FSC Rater<sup>TM</sup> Powered by PL Rating, on the main screen, select Setup under the Application option.

e	Setup Menu	
g	Select Markets	Rater Settings
	Road Hazard / Auto Clubs	Agency Information
	Motorcycle	Bridge Setup
	Homeowners	MVR Setup
	Dwelling Fire	Management System Exporter
	Basic Fire	Warnings
Ig	wobie nome	options
N	N NF 62m	Close

B. The Setup Menu will appear and you will click on the line of business that contains the Market(s) you wish to select for Rating. For Anchor Gemini RT, Automobile will need to be selected as the line of business.

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	Company Name	Num	Coverage	Code	Two	Three	Four	Five	Six	Seven
	Academy Medallion	48	u							
	Academy Platinum	47	LI							
	Anchor Gemini	40	LVPH							
X	Anchor Gemini RT	877	LVPH							
	Anchor Motor Club	230	LVPH							
	Anchor Platinum	45	LI							
	Anchor Platinum Special	395	u							
	Anchor Premier		1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1							
	Aspire Adv NonOwner Full Pay R	T A	$\mathbf{C}$							
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	Aspire Adv Roadside Full Pay RT	422								
	Aspire Adv Roadside Monthly RT	816	LVPH							
	Find Select Al Sel	ect None								
-	Total in Pater: 91		Now Selected	1		Can R	a åddad	. 9/	1	

C. The Auto Company Selection will appear, and you can then scroll or search by market name or number. To select a market(s), simply click the box to the left of the market name. Once your selections are complete, simply click OK at the bottom of the selection box.

	Setup Menu	>	<
e	Setup Menu		
g	Select Markets	Rater Settings	
	Automobile	Carrier Credentials	
	Road Hazard / Auto Clubs	Agency Information	
	Motorcycle	Bridge Setup	
	Homeowners	MVR Setup	1
	Dwelling Fire	Management System Exporter	
	Basic Fire	Warnings	
	Mobile Home	Options	
lg			
N		Close	

D. To enter any necessary credentials needed for rating and/or bridging, you will need to select Carrier Credentials which is also under the Setup Menu to enter any required credentials. As a note, this page does take a minute to load.

FSC Rater Carrier Credentials Webpage	Dialog		×
Carrier (	Credentials		^
User Name:	l.		
First Name:			
Last Name:			
E-Mail Address:			
Update		E	
Search		S	earch
Market Group		Credential	
AnchorRT	Add		

E. Simply click Add to add the username, password, and agency code.

AnchorRT	X	
User Name:		$\left  \right $
Password:		
Agent Code:		
A	dd Close	

User Name: This is the Producer's current username they use today.Password: This is the Password that you created in the Diamond System during the first part of this set-up process.Agent Code: Diamond agent code.

Be sure to click **Add** before exiting screen.

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F. Now, you are ready to begin quoting. On the main screen of the Rater, click **Automobile** to start a new auto quote.

Links for your customer: Insured's link https://policyexpress.com