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

Login: Your Current Anchor Login	
Password: Anchor1234! Forgot Password? Change Password?	
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	l 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							weicome fourki	Croccogint Agency: AG100 C89-Tes Logout Contact User: v538.008.4300- System Date: 10/23/20
Home Client Policies Quote Tas	ks Resour	ces Repor	ts Contact	Js				Policy or Claim Number	- Q 🗆
Della : #				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	
	No data to display								
	No data to paginate Page size: 5							Page size: 5	
	Remote E-Sign Pending With Payment Outstanding (0)								
	Policies Pending Cancellation (2)								
	Recently Cancelled Policies (11)							•	
	Renewals (0)						•	
	New Busine	ess Policies (0)						J	
	Recent End	lorsements (0)							
	New Claim	s within 30 day	s (0)					(J)	

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



Next Step: Setting Up Credentials in PL Rating[™] from Vertafore[®]

Note: Please turn off you pop-up blocker in your browser before proceeding.

Itients Di A Manage Real-Time Passwords New Import Agency Manage Real-Time Passwords Search Client Last Name for Go Client Name for Go Reset Client Name for Go Reset Previous Pagel [Next Page] 07/03/2019 Image Search Page 1 of 1 Seer VICION S Notes Search	Client Selection Existing Clients for: [50934] Test Agency - Pulaski, TN		-	7	Manag	e Users	Support	Help	Logout
Search Client Last Name for Go Reset Client Name Last Activity Solutions At Quote Setup Go Client, Test 07/03/2019 Solutions At Quote Setup Provious Page] [Next Page] Manage Lead Sources Solutions At Quote Setup Page 1 of 1 Solutions At Quote Setup Solutions At Quote Setup	lients New Import Agency		Di	A	Manag Manag Transf Logout	e remplates e Real-Time Pa er Business t Users	asswords		
Previous Page [Next Page] Aanage Lead Sources See vynacts inew!	iearch Client Last Name for Client Name Client, Test	Go Reset Last Activity 07/03/2019		B	Manag Solutio Insura Subscr	e Agency of on ons At Quote Se nce Score Setu ribe to Agent P:	mation etup p aid MVR		
	[Previous Page] [Next Page] Page 1 of 1			Se	Manag		ive	w!	

- A. Under the "Admin" menu,
- B. Select "Manage Agency Information".

Agency Inform	ation States Carriers	Products	Agency Fees		
Agency Name	Test Agency		x		
Address 1	100 Disk Drive				
Address 2		^			
ZIP Code	38478	A			
City	Pulaski				
State	TN				
Work Phone	(931) 111-1111				
Fax					
Agency URL					
	SSN Not Visible				
	Use Multi-Factor Authentication				
	_ Use IP Address Security				
		Next	cel	Finish	

A. On this page, select "States" tab. the "States" tab will appear.

Agency Information	States Carriers	Products Agency	Fees	
Please check each state yo	u rate in			
Alabama	lowa	Nebraska	Rhode Island	
Arizona	Kansas	Nevada	South Carolina	
Arkansas	Kentucky	New Hampshire	South Dakota	
California	Louisiana	New Jersey	Tennessee	
🗆 C , >do	Maine	New Mexico	Texas	
Connectic.	Maryland	New York	Utah	
Delaware	Massachusetts	North Carolina	Vermont	
District of Co	Michigan	North Dakota	Virginia	
Florida	Minnesota	Ohio	Washington	
Georgia	Mississippi	Oklahoma	West Virginia	
Idaho	Missouri	Oregon	Wisconsin	
Illinois	Montana	Pennsylvania	Wyoming	
- Indiana		В		
	Back	Next Cancel	Finish	

- A. Now select the state "California".
- B. Click "Next".

PL Rating power4 by Vertafore Account Information - Carriers	
Agency Information States Carriers Products Agency Fees	
State California Line of Business Auto Available Companies	
Anchor Gemini - Real Time Rate AstiPrivensive Auto-Owners Cabrillo - Palomar Sputolty Chubb Masterpiece Cincinnat Encompass D Gutistream Heritage Metifie Nationvide Safeco State Auto Travelers E	
Back Next Cancel Finish	

- A. Select "Carriers" tab.
- B. Select the State "California" under the dropdown menu.
- C. Select "Auto" under the dropdown menu.
- D. Select the appropriate Anchor Company -Real Time Rate (with the green dot).
- E. Click on Next button.

PL Rating	
	Change Request Summary
	Review information below and click the Finish button to complete the setup process. After you click the Finish button, this summary will be sent to you via email.
	Change Request Summary
	Carriers Added: Gemini RT
	A
	Back Finish Cancel
_	

Here you will see the summary of your account.

- A. Check this box if you want to receive an email sent to the user of this account.
- B. Click on the "Finish" to complete the process.

If using the Single Sign On version, skip to page 13, otherwise continue below.

Native PL Rating Real-Time Password setup

N PL Rating	Leads 🚥	Admin 🗸	Reports 🗸	P	2	⋓	~	
Client Selection		Manage Users	ĺ]
Existing Clients for:		Manage User T	ypes	_				1
Clients	Did You Know	Manage State L	icenses				-	Ч
New Import Agency Search Client Last Name for Go	Reset NO D	Manage Templa	ates					
Client Namo Last Activity	PL Rati	Manage Real-Ti Passwords	ime 🔶	ober 18	3, 2024	4:		
10/17/2024 10/17/2024	Client a cell pho	Transfer Busine	ess	t for				
10/17/2024 10/17/2024	/ C / C	Logout Users						
10/17/2024	10							
10/17/2024 10/17/2024	/ C / C	manage Agency	ant ioni	ED — day October	18, 2024 ot	P:30 CST		
10/17/2024	10						_	Ц

To manage Native PLR setup, go to Admin,

A. Select Real-Time Passwords under sub-menu.

Native PL Rating Real-Time Password setup

🕅 PL Rating				Leads	Admin	~
Overview Manage Users	Administrative Utility	CLIENT				
Manage User Types State Licenses Manage Templates	Real-Time Password Please select each carrie each carrier to access th	is er you work with and enter th eer website.	e Username and Password that y	you set up with	5	
Manage Passwords Transfer Business Reports	Insurance Carrier Site: Select Login:	Anchor General No Description (AGIA)		•		
Log out Users Market Access Admin Manage IP Security	Login Description: User Name: Password:	No Description				
Manage Leads Custom Proposals	Confirm Password: Agency Code:	Save	Delete Login			
Exit Admin			Dente Login	1		

- 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.

Native PL Rating Real-Time Password setup

M PL Rating		Leads Admin	✓ Reports ✓	e j	
Client Selection Existing Clients for:	В				
Clients					
New Troport Agency	Go Reset				
Client Name	Last Active	A			
O Existing Client	10/16/2024 🥒 🖸				
0 11	10/15/2024 🥒 🙄				
0 R	10/15/2024 🥒 🖸				
0	10/15/2024 🥒 🙁				
0	10/11/2024 🥒 😋				
0	10/10/2024 🧪 🔇				

Back on the Client Selection screen, you can choose to (A) select an existing client or (B) add a new client.

N PL Rating				Lea	ds ⁹⁹⁰ Admin 🗸	Reports	~ &	0 🙂	
lew Auto Quote lew Home Quote	Clients Quote Selection								
lew Package Quote lew Dwelling Fire lew Motorcycle			Jen T Test CA Address: Cell Phone	Auto 1812 Lynx Gin Escondido, CA 9	2028-3330	'			
rd Party Reports nport	A	В	Home Phone: Email Address	(931)424-4312 sumesne@gmail	Loom				
orms	Existing Guotes				Search by Des	pription		Go	Rese
	100 27 9	State Description		Status	Notes Effective	Modified	Modified By	Created By	
	Select Copy Auto	CA		Submitted	10/17/2024	10/17/2024			Delet
	Select Copy Auto	CA		Quoted	4/9/2024	10/9/2024			Dele
	Select Copy Auto	CA		Incomplete	4/9/2024	10/9/2024			Delet

Once this selection is made, you are taken to the Quote selection screen. You can select to add a new quote, (A) select an existing or (B) copy an existing.

Native PL Rating Real-Time Password setup

Select Companies General Info Vehicle Info Additional Interest Driver Info Incident Info Co. Questions Rate 7 rd Party Reports Create Package	Clients Quotes California - Personal Automobile Jen Test Anchor Gemini	CLIENT Auto, Jen T Test CA (931)424-4312 / someone@gmail.com	NOTES 🖋			
	Quote Setup	Companies All None 1 Company(s) Selected	Rate			
	California Auto Templates. PL Rating Presels Ube the selected template for all new quotes. Company Groups New Update Delete	Anchor Gernini - Real-Time Rate Anchor Genini Anchor Motor Club Academy Medallion Anchor Platinum Academy Platinum Academy Platinum				
	Al Real Time Carters Al Carters with Submission	 Anchor Premier Pac Star - Medallion 				

If a new Auto quote was selected from the left-hand menu (using Auto as an example since Anchor Real Time Rating is Auto only), you will be taken to the Select Companies screen. Select any companies you wish to include to rate by checking the box beside the name of the division. Again, for example, Anchor Gemini Real-Time Rate is selected above. From here, click the Next button highlighted in blue to continue through entering an Auto quote.

You have completed the password setup. To return to home page, simply close the Manage Real-Time Passwords page.

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

Single Sign-on PL Rating



A. Select "Credential Manager" under the sub-menu.

Single Sign-on PL Rating

🕅 Credential Manager		Groups	Users	Administration	P	2	1	Ň
Users			A					
earth Search for users	User Crodentials							User Credential Repo
	AM Ordential Remove Ordential	New Credential						
	Service Provider Inted	Service Provider:*						
	R		This Serv	rice Provider offers co	nnectivity	through	TransactNOW	, PL Rating
3		[1] Line Federation						
		Usemame:*						
		Pasaword:*						
		Description:*						
		* Required						
		Agency / Producer Co	des:					
		ANCON	tini Gala					
		Agency/Producer Cod		1	Sescription			

On the Credential Manager page:

- A. Select your carrier from the drop-down menu
- B. Enter Username, Password, and the Description.
 - (Description field to be determined by the Producer.)
- C. Click on "Add Code" button, the pop-up shown below will appear.

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.



- A. Select the Agency/Producer Code from the drop-down menu. *(Diamond agent code)*
- B. Select the Description from the drop-down menu.
- C. And click "OK" button.

Single Sign-on PL Rating

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(h) Search for users	Aut Conternal Increas Contential Service Provider Provider	New Credential Service Provider:* Cher Folderation Username:* Pnesword:* Description:*
		* Required Agency / Producer Codes: Add Date Inscrete Table Agency (Producer Code: Description
		i con Sell Vertafo

A. Click "Save" button.



A. To make any edit, select the carrier on the left column and make the changes on the right side of the screen. Be sure to click "Save" button when you are done.

You have completed the password setup. To return to home page, simply close the Manage Real-Time Passwords page.

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