APPALACHIAN UNDERWRITERS, INC

BUSINESS MADE EASY

Agent Portal v2.0
Training Guide

Welcome to Agent Portal v2.0

What is Agent Portal?

Agent Portal is your gateway to all things AUI. As an appointed agent, you will have access to Policy Data (Submissions, Expiring Policies, Notices of Cancellation); Rating; Forms; Commissions; exclusive training information and much more.

Who can use Agent Portal?

Any appointed agent in good standing with AUI will have access to Agent Portal. You may register on the homepage, or you can use your agency email and location zip code to login. If you have previously logged in, you can use your same credentials.

New User Registration

User registration on Agent Portal is very simple. To register as a new user, you will need:

1. A valid email address
   a. It must be different from your agency email address. If you would like to use your agency email address, simply login with that email address and your agency zip code, and change your password using the instructions found later in this document.
2. Your producer code
   a. This can be found at the top right of your commission statement. If you cannot find this information, please ask your agency administrator, or contact us at customercare@appund.com.
3. Your agency zip code
   a. This must match the location of the producer code used in step 2.

To register:

1. Click on **Register New User**
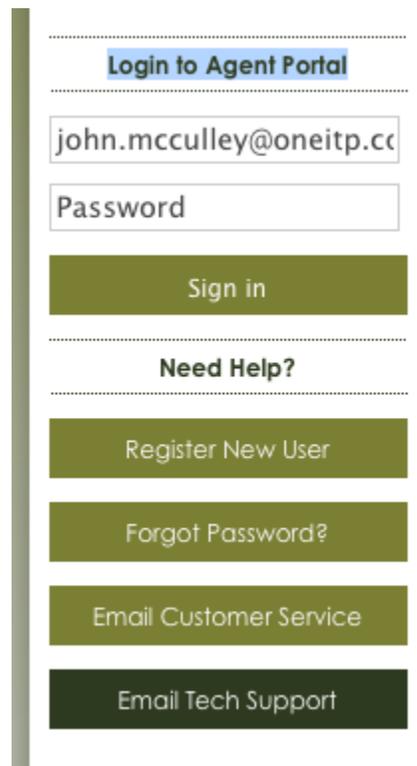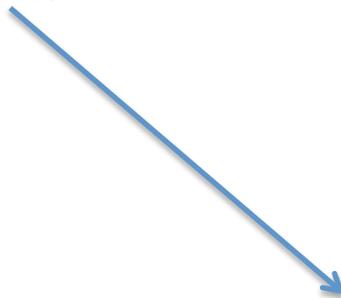
2. Enter in your **Email Address.**
3. Enter a **Password.**
4. Confirm **Password.**
5. Enter in your **First Name.**
6. Enter in your **Last Name.**
7. Enter your **Producer Code.**
8. Enter you **Agency Zip Code.**
9. Enter the **CAPTCHA*.**
10. Click **Create.**

*These words must match exactly.

Register as a User

2	Email Address: mcculley1108@gmail.com
3	Password
4	Confirm Password
5	First Name: J
6	Last Name: McC
7	Producer Code (This can be found in the top right corner of your commission statement next to Agent ID): P13123123
8	Agency Zipcode: 30000
9	emarkag hall
10	Create

If you receive the message below, one or more of the pieces you provided is incorrect. If you receive this more than once, please contact customercare@appund.com for further assistance.

- Unable to register user. One or more of the fields below contains incorrect information. Please note that your Producer Code and Zip Code must be correct in order to continue. You can find your Producer Code in the top right corner of your commission statement to the right of Agent ID. If you continue to have trouble, please contact customer service.

If you do not receive any error messages, you will be taken to the next screen, **Verify User Email address.**
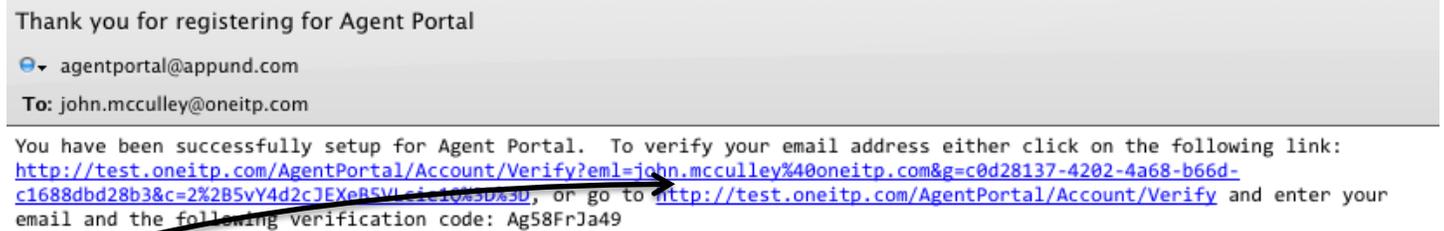
Verify User Email address

email

john.mcculley@oneitp.com

VerificationCode

reCAPTCHA™

stop spam.
read books.

Submit

At this point, you should have received an email from Agent Portal that look like this:

Thank you for registering for Agent Portal

agentportal@appund.com

To: john.mcculley@oneitp.com

You have been successfully setup for Agent Portal. To verify your email address either click on the following link: http://test.oneitp.com/AgentPortal/Account/Verify?eml=john.mcculley%40oneitp.com&g=c0d28137-4202-4a68-b66d-c1688dbd28b3&c=2%2B5vY4d2cJEXeB5VLeieiQ%3D%3D, or go to http://test.oneitp.com/AgentPortal/Account/Verify and enter your email and the following verification code: Ag58FrJa49

There are 2 ways to verify your information:

1. Click the link in the email. This will automatically verify your information.
2. Copy and paste to code from the email into the textbox on the **Verify User Email Address** screen, then click **Submit**.

Verify User Email address

email

john.mcculley@oneitp.com

VerificationCode

reCAPTCHA™

stop spam.
read books.

Ag58FrJa49

Submit

You should receive this message:

Success

Thank you, your email has been verified. You may now Login to the portal.

Login to Agent Portal

You are now verified and registration is complete.

Your User Profile

Edit User Profile

AUI takes pride in having the most accurate information available in order to assist our agents. If you are seeing this screen for the first time, we would like you to fill in the information so we can better serve you.

If you need help, please use our training video here, or contact us at portal@appund.com.

Company/Agency Name

Demo Insurance Agency

To change your Company/ Agency Name, you must contact customer service.

Prefix		Title	

First Name		Phone	

Last Name		Fax	

Save   Reset

Once you have registered successfully, you will be taken to your **Profile**. If you are already registered, you can access it from the top navigation under **Portal Home => My Profile.**

Please take the time to fill in this information so that AUI will have accurate records for your agency. Once you have completed the information, simply click **Save.**

You can always edit this information by navigating back to **Portal Home => My Profile.**

Portal Home

My Profile

Edit Security Questions

Change Password
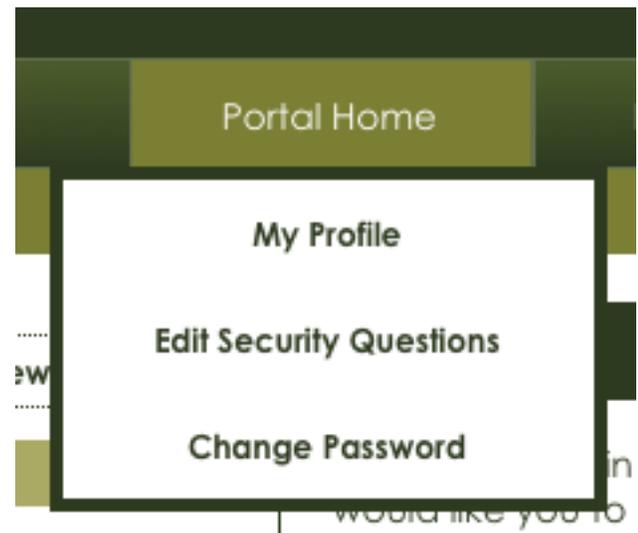
Setting Security Questions

Once you are registered, a best practice step in password management can be taken by **Setting Security Questions.** These questions and answers give our system a way to verify your identity and automatically return your password if you forget.

To set these questions, please navigate to **Portal Home => Edit Security Questions.** If you have just registered, once you fill out your **Profile**, you will be automatically directed to these questions.

If you forget your password, we will ask for the answer to your security question. Choose an answer that is memorable, but not easy to guess. Your answer should be a complete sentence.

If you have posted any personal or favorite information on social network sites like Facebook, MySpace, or personal websites, do not use that question.

Tips for keeping your security question and answer secure:

1. Never tell anyone this information and don't write it down.
2. Never send this information by email.
3. Periodically select different questions.

For your security, please make sure the answer to your Security Question is:

1. Something only you know
2. Not likely to change over time
3. A minimum of five characters long
4. Not associated with your password or username in any way

To set your questions and answers:

1. Select a question from the left dropdown.
2. Type the corresponding answer in the right text box.
3. Click **Save**.

Password Management

To change your password:

1. Login to Agent Portal with your email address and password.
2. Navigate to **Portal Home => Change Password** from the top navigation.
3. Enter your **Old Password**.
4. Enter a **New Password**.
5. Verify the password.
6. Click **Submit.**
7. Your password has now been changed. If this process is successful, you will be redirected to your profile.

Forgot Password (Security Questions Set)

1. Click **Forgot Password** under **Need Help?** on the homepage.

2. The **Reset/ Recover Password** dialog will appear. Enter your **Email Address** in the box on the page.

3. The **Recover Password** dialog will appear. One of your **Security Questions** will be asked. Provide the correct answer for that question.

4. Type in a **New Password**.
5. Verify that password.
6. Click **Submit**.

7. The screen above will appear, and you will be redirected to the homepage.

Forgot Password (Security Question Answer Wrong or Security Questions Not Set)

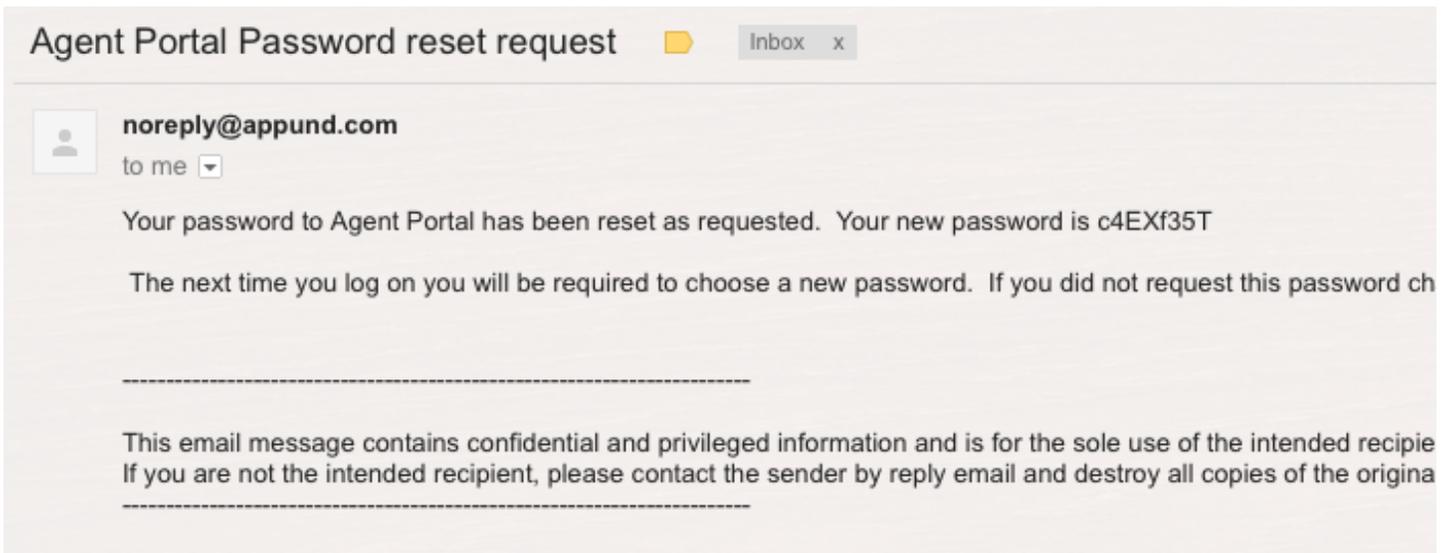1. Click **Forgot Password** under **Need Help?** on the homepage.

2. The **Reset/ Recover Password** dialog will appear. Enter your **Email Address** in the box on the page.

3. If you answered the question wrong (see step 3 in **Forgot Password (Security Questions Set)**, or you have not **Set Security Questions** (see pg. 6), the **Reset/ Recover Password** dialog will appear with a **CAPTCHA** at the bottom.

4. Your email address will be pre-populated. You cannot change this.

5. Enter in the **CAPTCHA**.

6. Click **Submit**.

7. Your password will be reset and emailed to you.

Agent Portal Password reset request 📁 Inbox x

noreply@appund.com
to me ▾

Your password to Agent Portal has been reset as requested. Your new password is c4EXf35T

The next time you log on you will be required to choose a new password. If you did not request this password ch

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This email message contains confidential and privileged information and is for the sole use of the intended recipie
If you are not the intended recipient, please contact the sender by reply email and destroy all copies of the origina
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8. Login with your new password.

9. You will be prompted to change this password.

You are required to select a new password at this time.

Old/Current Password

10. Enter in the password you just received as the **Old Password**.

Please note: Your new password must be 6 or more characters. Please use something that is unique to you, and keep your information safe.

11. Enter a **New Password**.

New Password

12. Verify the password.

Verify Password

13. Click **Submit**.

14. Your password is now changed.

Submit

Rating in Agent Portal

The raters are now located on the left side of Agent Portal under **Create New Quote**.

1. Select a Division **(Work Comp, Commercial Specialty, Personal Lines)**

2. Click the arrow on the right of the dropdown menu to display the **Raters** in that category

3. Click the **Rater** of your choice.

4. You will be redirected to the rater and signed in **(AUI Products Only)**

Policy Data

Agent Portal allows you to view **Policy Data** for all policies that are bound by AUI.

Please note that all data may be 24 to 48 hours behind. If you have recently submitted business and do not see it here, please wait a full 24 hours before contacting customer service.

Also note: The data represented by Agent Portal does not contain Carrier Direct policy data. Only policies written by Appalachian Underwriters, Inc. will be displayed.

1. Navigate to **Policy Data => Submissions, Expiring Policies, or NOCs** from the top navigation, or from the **View Policy Data** dropdown on the left sidebar.

2. Your data will be displayed. The view below displays **Submissions.** Other views may have slight variations.

3. To sort by **30, 60, or 90 Days,** click the dropdown noted in the diagram. **(Not available on NOCs)**

4. To sort by **Status**, click the dropdown noted in the diagram. **(Not available on Expiring Policies or NOCs)**

5. You may sort the columns by clicking on the column title.

6. To view more details, click the green **Details** button.
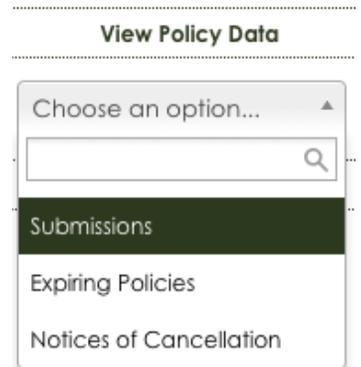
Recent Submissions (57)*

	Ref #	Insured	Status	Carrier	Effective Date
View Details	667478	D & A MFG HOME CONSTRUCTION	Declined	State National Insurance Company, Inc	3/22/2012
View Details	668437	DON C GEORGE INC	Bound	State National Insurance Company, Inc	4/9/2012

Commissions

You may now view your agency's **Commissions** in Agent Portal.

1. Navigate to **Commissions** from the top navigation.

2. Your **Paid Commissions** will be displayed. To view pending commissions, simply select **Pending** from the same menu.

3. To **View Details**, click the green **View Details** button.

4. On the **View Details Screen**, you will see the details of the commission statement you selected, and you will be able to see individual **Policy History, Export to CSV, or Download the Statement.** To see these features live, please watch the **Commissions Training Video** in the **Agent Training** section of Agent Portal.

5. You may also **Download Statement(s)** as PDFs from this screen.

6. If you would like to keep your commissions secure, you may **Set Security Pin for Commissions.** Instructions are on the next page.

Commission History

Last 30 days

	Date	Amount	Payment Method
View Details Download Statement	3/23/2012	$3,327.10	EFT

Older

	Date	Amount	Payment Method
View Details Download Statement	3/16/2012	$398.23	EFT
View Details Download Statement	3/9/2012	$1,660.67	EFT
View Details Download Statement	3/2/2012	$330.78	EFT
View Details Download Statement	2/24/2012	$3,772.98	EFT
View Details Download Statement	2/17/2012	$3,127.29	EFT
View Details Download Statement	2/10/2012	$1,486.53	EFT
View Details Download Statement	2/3/2012	$369.85	EFT

Commissions (Set Security Pin)

At AUI, we value your agency's privacy. If you'd like to **Set a Security Pin** to protect your commissions, you may do so on this page by clicking **Set Security Pin for Commissions**.

1. From **Commissions**, select **Set Security Pin for Commissions**.

2. Enter in a **PIN** of your choice.

3. Click **Submit.**

4. Your **PIN** is now set. You will be redirected to **Commissions.**

5. To remove your **PIN**, simply click **Remove Security Pin for Commissions**.

PLEASE NOTE: Only the email owner of the account that set the PIN can change or remove it.

Forms Library

ACORD Forms

Choose the appropriate form... ▼

Tax Forms

Choose the appropriate form... ▼

Broker of Record

Choose the appropriate form... ▼

Endorsements

Choose the appropriate form... ▼

Workers Compensation

All Forms

Choose the appropriate form... ▼

Commercial Specialty

Commercial Auto

Choose the appropriate form... ▼

General Forms

Choose the appropriate form... ▼

Other Forms

To access **Forms** in Agent Portal:

1. Navigate to **Forms** from the top navigation, or to **Agent Tools => Forms Library** in the dropdown in the left sidebar.

2. If you select a Division or Department from the **Forms** menu, you will be taken directly to that section.

3. Select a form from the dropdown menu(s).

4. You will be directed to a PDF of that form.

Agent Tools

Agent Training

Selecting Agent Training from the Agent Tools menu **(Agent Tools => Agent Training** in the top navigation and the sidebar**)** will take you to the training portal. On this page, you can watch training videos from the AUI staff, or you can register for webinars using the calendar at the top of the page.

Rating with Xpress FAQ

On this page, you can view news and updates about AUI's Xpress Rating System.

AUI is constantly improving its efforts to rate on the fly with our Xpress Rating Platform.
Please choose a rater to the left to continue.

Here are some recent changes:

March 12, 2012
AUI would like to encourage you to perform all of your rating through Agent Portal. In order to make this simpler, we have updated Age
to sign you in to all of our raters once you are logged in. Please remove all old "Favorites" or "Bookmarks" to our raters, as this functionalit
be available to you if you go directly to the rater's URL. If you have any questions or are not sure how to use this functionality, please em
portal@appund.com.

March 12, 2012
You may now rate your GL and Package business through our new GL and Package Router. Based on your answers, you will receive an
opportunity to rate with Xpress BOP, USLI, or Atlantic Casualty. Please click the option for Xpress GL and Package to the left under Xpres
with AUI to get a rate now.

Other Useful Information

Logging Out

To **Logout**, simply click **Logout** on the green bar under the top navigation.

Support Information

If you need **Technical Support:**

Please email us at portal@appund.com.

If you need **Account Support:**

Please email us at customercare@appund.com.

If you need **Phone Support:**

Please call 888-376-9633.

To return to the AUI main website (appund.com)

Click **Back to AUI** from the top navigation.