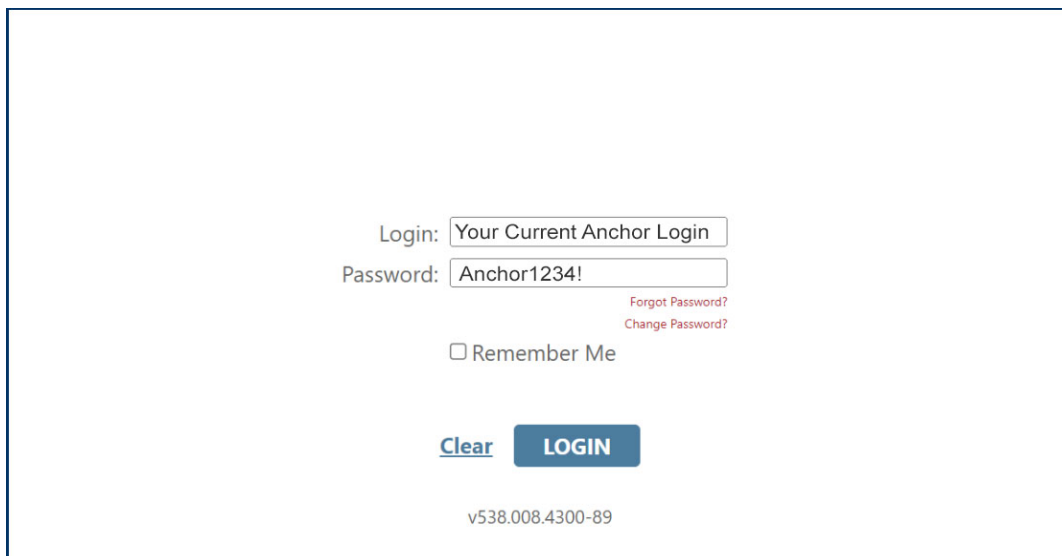


# First Time Password Set Up for Diamond

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:

Password:

[Forgot Password?](#)  
[Change Password?](#)

Remember Me

[Clear](#)

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:

New Password:

Confirm Password:

**Login Failed: Password must be changed.**

v538.008.4300-89

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.

Welcome YourAnchorLogin! Agency: AG1001  
C89-Test-  
Logout Contact L  
User:  
v538.008.4300-E  
System Date: 10/23/202

Home Client Policies Quote Tasks Resources Reports Contact Us  🔍

Policy #:   
Make Payment

Policy Search  
Recent Quotes

Message Center (view all)

### Daily Action Items

- E-Signature Outstanding (0) ↑
- Remote E-Sign Pending (0) ↑

Policy	LOB	Name	Address	Effective Date	Expiration Date	Status	Premium
No data to display							

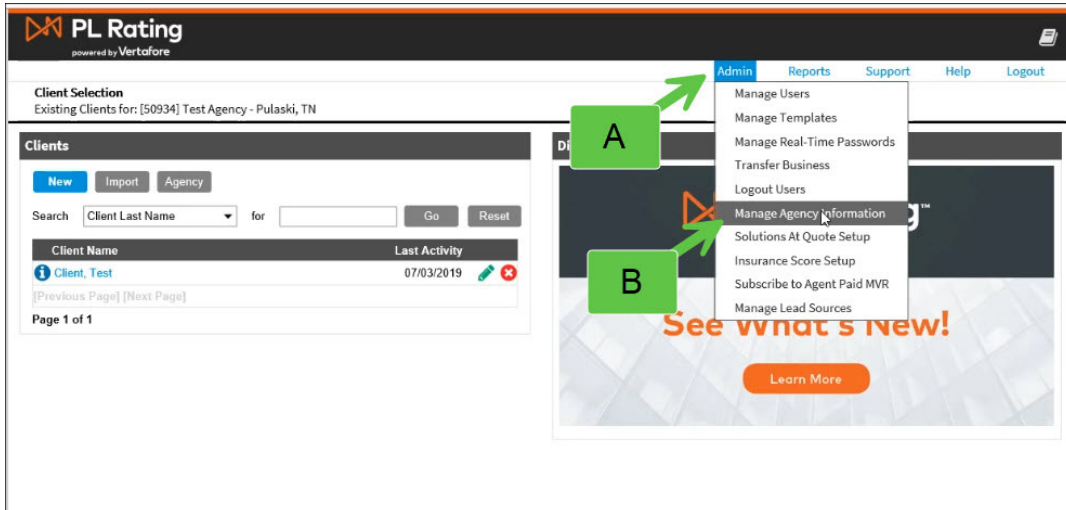
No data to paginate Page size: 5

- Remote E-Sign Pending With Payment Outstanding (0) ↓
- Policies Pending Cancellation (2) ↓
- Recently Cancelled Policies (11) ↓
- Renewals (0) ↓
- New Business Policies (0) ↓
- Recent Endorsements (0) ↓
- New Claims within 30 days (0) ↓

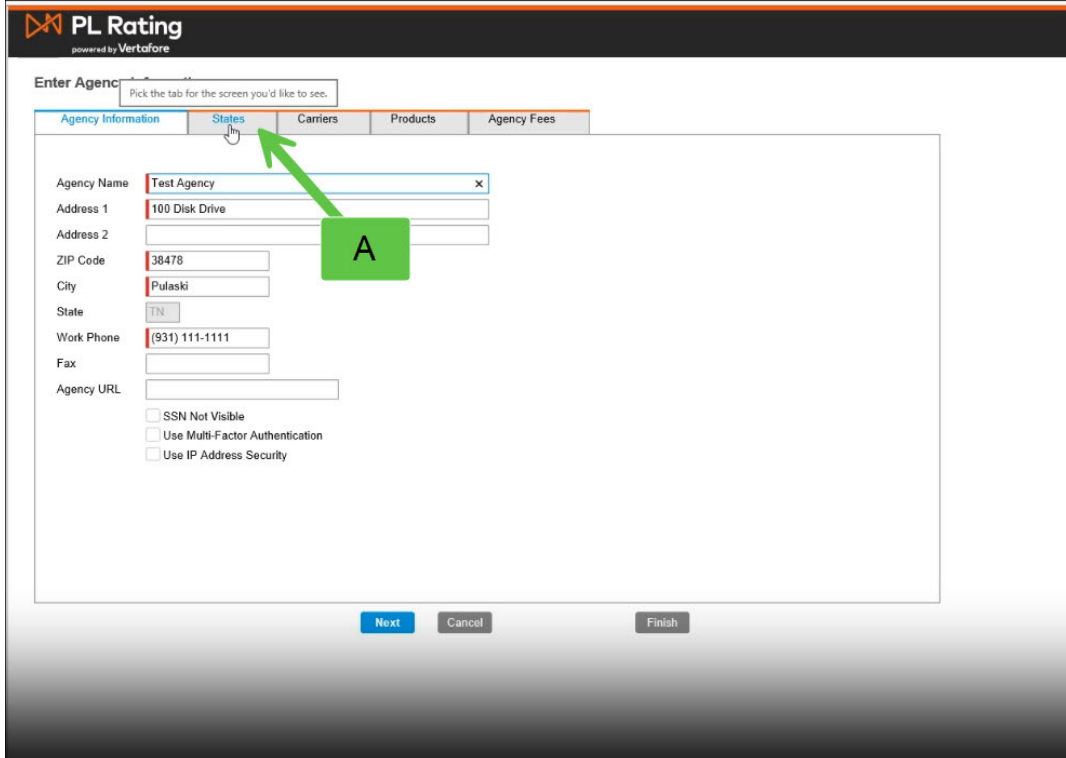
**Close Browser and Login again to make sure the password was successful. Very Important!**

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

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



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



- A. On this page, select “States” tab.  
the “States” tab will appear.

**PL Rating**  
powered by Vertafore

### Account Information - States

Agency Information | **States** | Carriers | Products | Agency Fees

Please check each state you rate in...

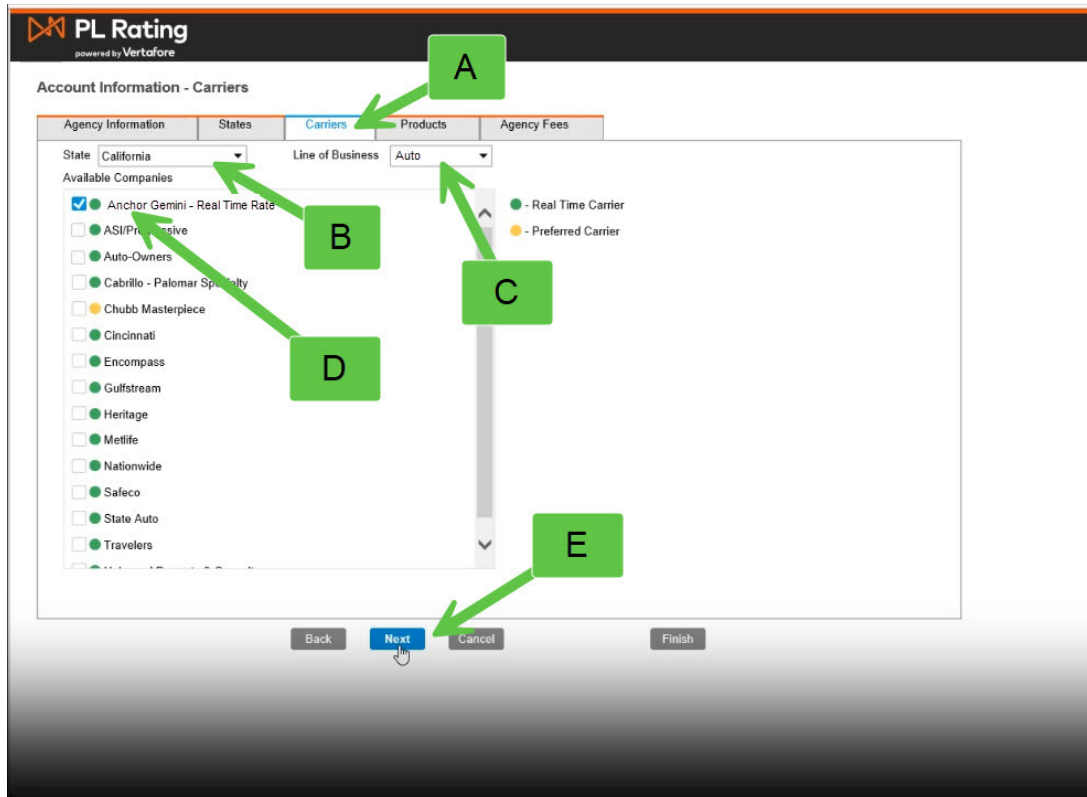
<input type="checkbox"/> Alabama	<input type="checkbox"/> Iowa	<input type="checkbox"/> Nebraska	<input type="checkbox"/> Rhode Island
<input type="checkbox"/> Arizona	<input type="checkbox"/> Kansas	<input type="checkbox"/> Nevada	<input type="checkbox"/> South Carolina
<input type="checkbox"/> Arkansas	<input type="checkbox"/> Kentucky	<input type="checkbox"/> New Hampshire	<input type="checkbox"/> South Dakota
<input checked="" type="checkbox"/> California	<input type="checkbox"/> Louisiana	<input type="checkbox"/> New Jersey	<input type="checkbox"/> Tennessee
<input type="checkbox"/> Colorado	<input type="checkbox"/> Maine	<input type="checkbox"/> New Mexico	<input type="checkbox"/> Texas
<input type="checkbox"/> Connecticut	<input type="checkbox"/> Maryland	<input type="checkbox"/> New York	<input type="checkbox"/> Utah
<input type="checkbox"/> Delaware	<input type="checkbox"/> Massachusetts	<input type="checkbox"/> North Carolina	<input type="checkbox"/> Vermont
<input type="checkbox"/> District of Columbia	<input type="checkbox"/> Michigan	<input type="checkbox"/> North Dakota	<input type="checkbox"/> Virginia
<input type="checkbox"/> Florida	<input type="checkbox"/> Minnesota	<input type="checkbox"/> Ohio	<input type="checkbox"/> Washington
<input type="checkbox"/> Georgia	<input type="checkbox"/> Mississippi	<input type="checkbox"/> Oklahoma	<input type="checkbox"/> West Virginia
<input type="checkbox"/> Idaho	<input type="checkbox"/> Missouri	<input type="checkbox"/> Oregon	<input type="checkbox"/> Wisconsin
<input type="checkbox"/> Illinois	<input type="checkbox"/> Montana	<input type="checkbox"/> Pennsylvania	<input type="checkbox"/> Wyoming
<input type="checkbox"/> Indiana			

**A** (points to California checkbox)

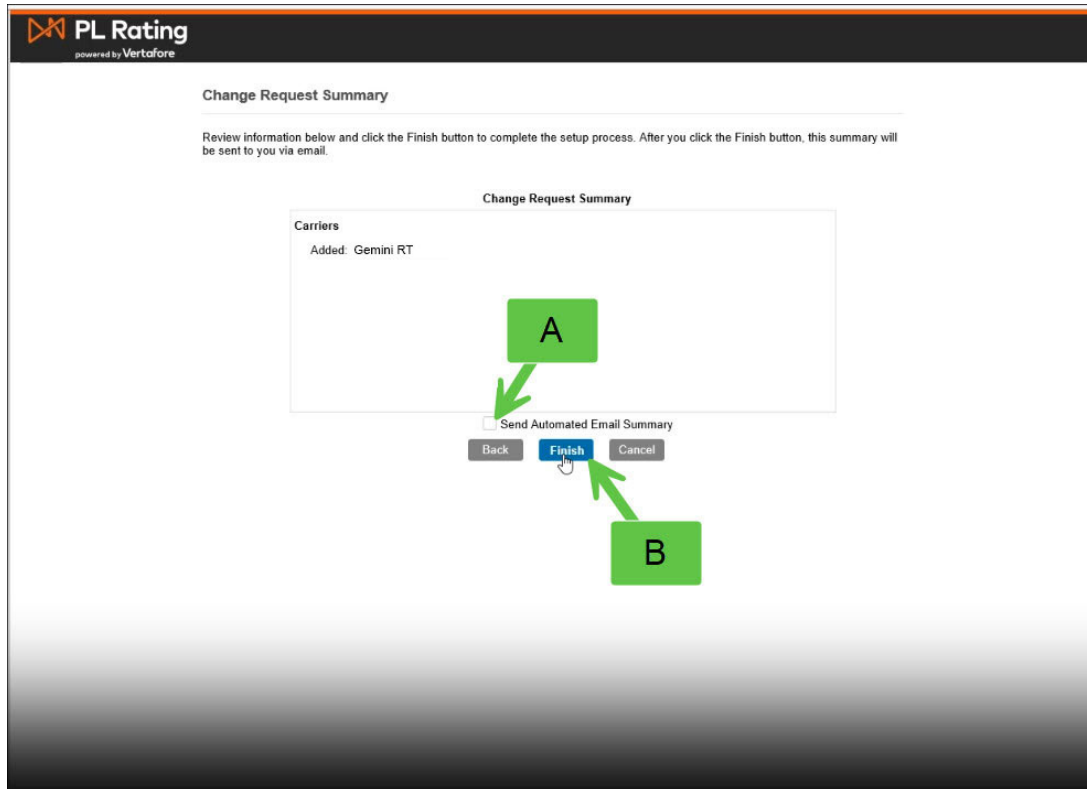
**B** (points to Next button)

Back | **Next** | Cancel | Finish

- A. Now select the state “California”.
- B. Click “Next”.



- A. Select “Carriers” tab.
- B. Select the State “California” under the dropdown menu.
- C. Select “Auto” under the dropdown menu.
- D. Select your carrier “Anchor Gemini”.
- E. Click on Next button.



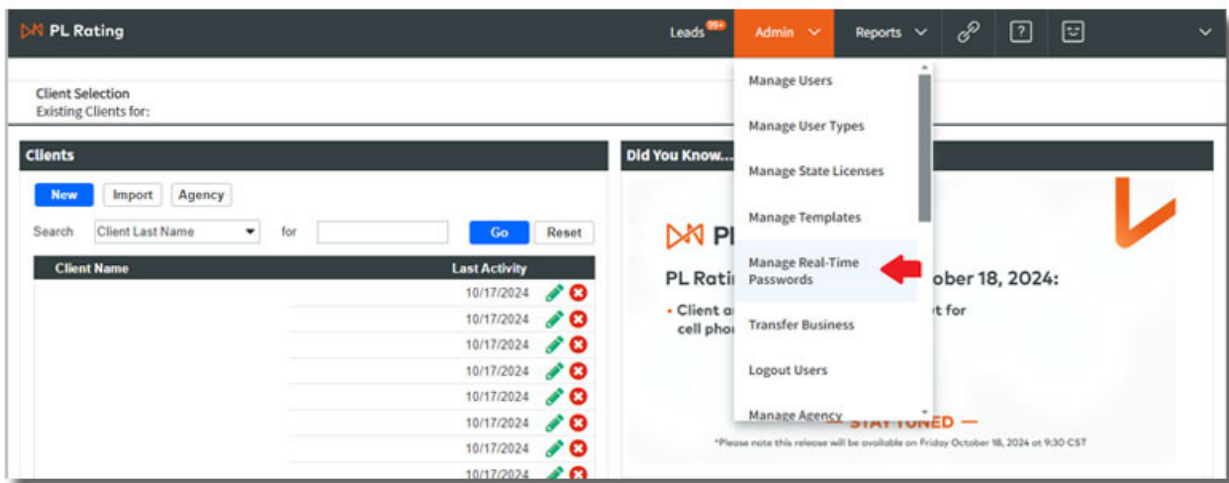
Here you will see the summary of your account.

- 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



To manage Native PLR setup, go to Admin,

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

# Native PL Rating Real-Time Password setup

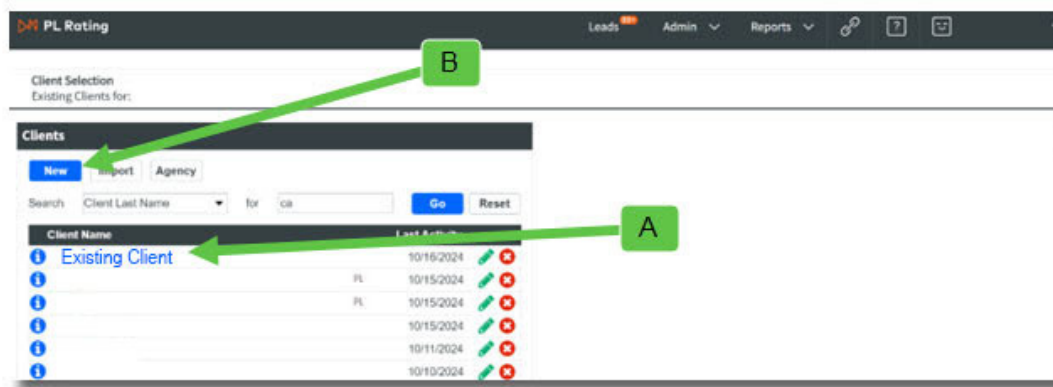
The screenshot shows the 'Administrative Utility - Manage Real-Time Passwords' page in the PL Rating system. The interface includes a sidebar with navigation options such as 'Overview', 'Manage Users', 'Manage User Types', 'State Licenses', 'Manage Templates', 'Manage Passwords', 'Transfer Business', 'Reports', 'Log out Users', 'Market Access Admin', 'Manage IP Security', 'Manage Leads', 'Custom Proposals', 'Manage MA e-Stamps', and 'Exit Admin'. The main content area is titled 'Real-Time Passwords...' and contains a form for setting up a real-time password. The form fields are: 'Insurance Carrier Site' (dropdown menu with 'Anchor General' selected), 'Select Login' (dropdown menu with 'No Description (AGIA)' selected), 'Login Description' (text input field with 'No Description' entered), 'User Name' (text input field), 'Password' (text input field), 'Confirm Password' (text input field), and 'Agency Code' (text input field). A blue 'Save' button is highlighted with a yellow box, and a 'Delete Login' button is also visible.

**User Name:** This is the Producer's current username they use today.

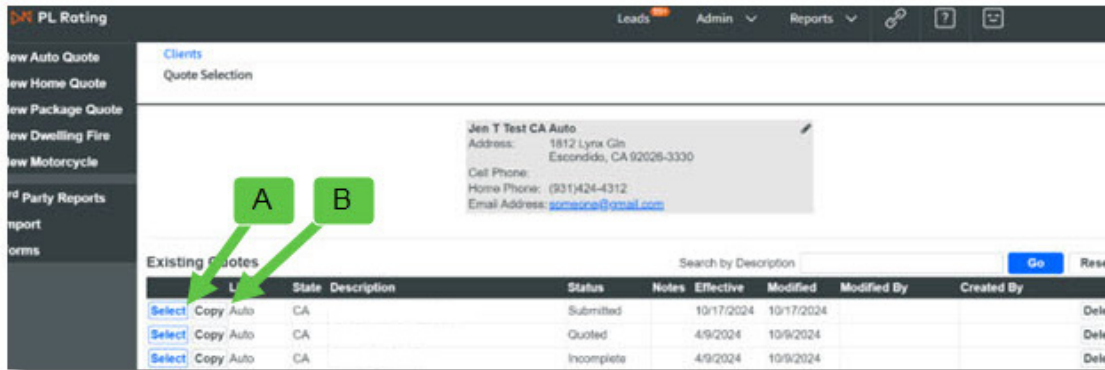
**Password:** This is the Password that you created in the Diamond System during the first part of this set-up process.

**Agent Code:** Diamond agent code.

# Native PL Rating Real-Time Password setup

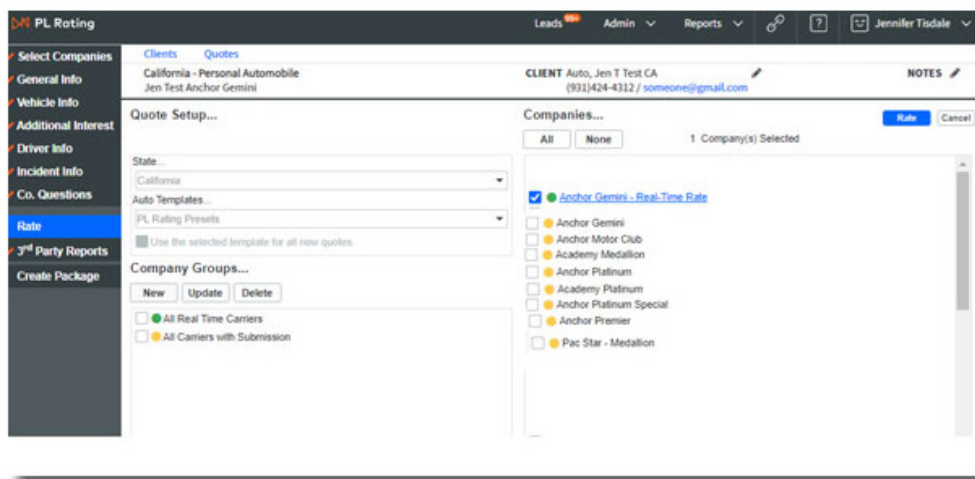


Back on the Client Selection screen, you can choose to (A) select an existing client or (B) add a new client.



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



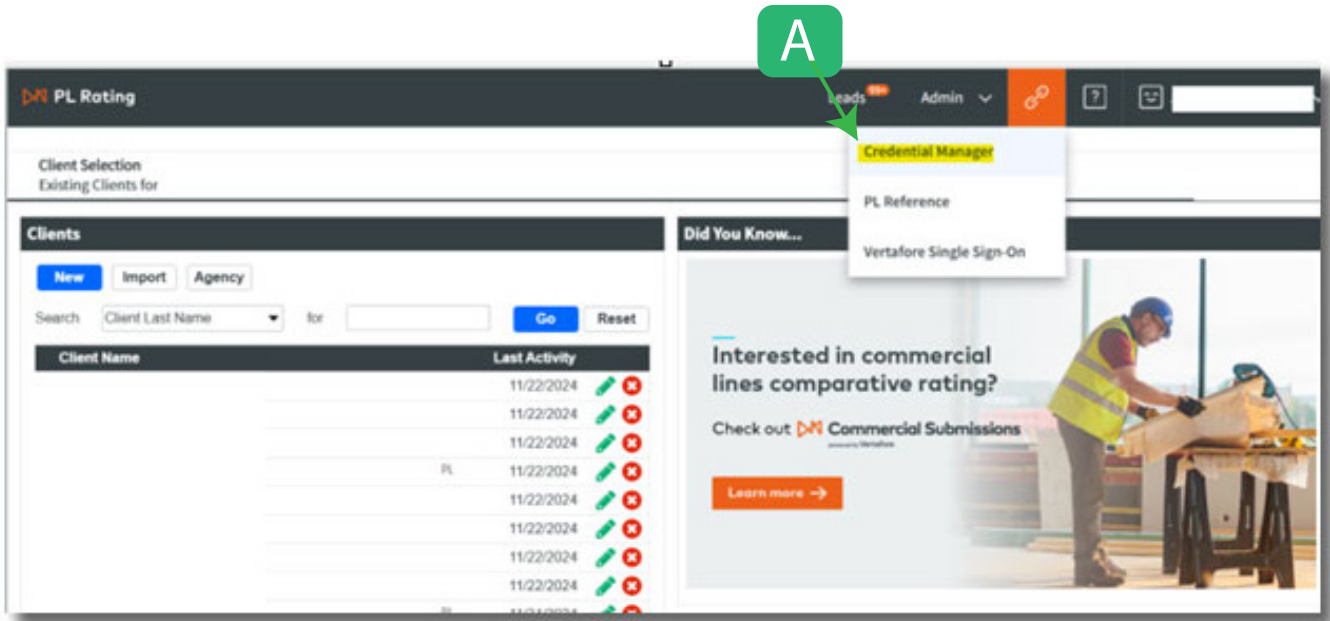
If a new Auto quote was selected from the left-hand menu (using Auto as an example since Anchor Gemini Real Time Rating is Auto only), you will be taken to the Select Companies screen. Select any companies you wish to include to rate by checking the box beside the name of the division. Again, for example, 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>

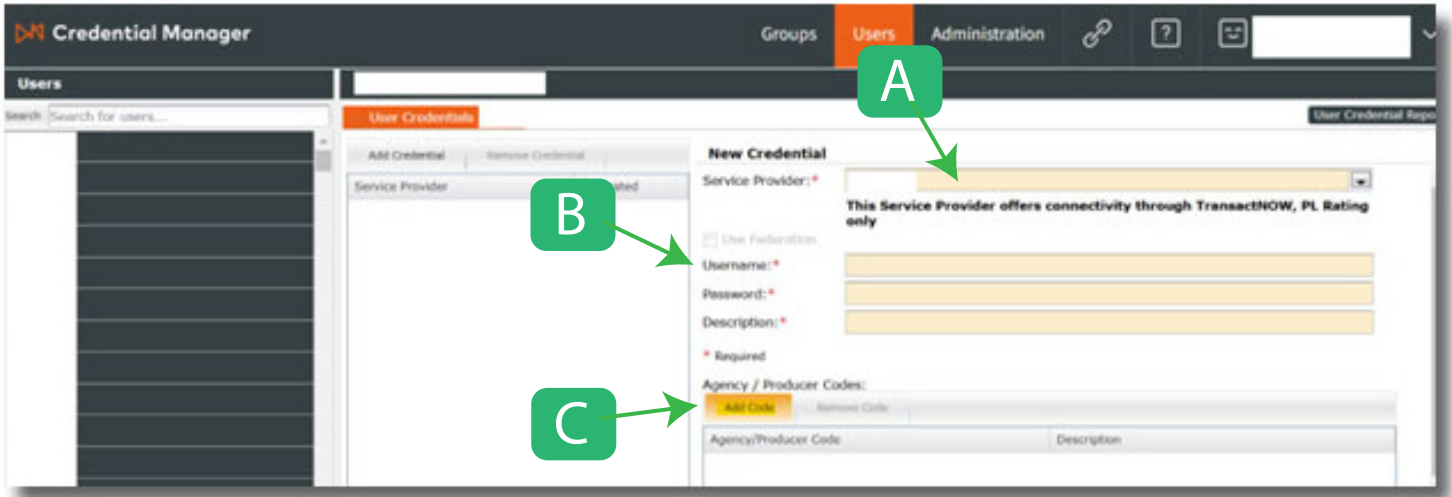
# Single Sign-on PL Rating

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A. Select “Credential Manager” under the sub-menu.

# Single Sign-on PL Rating

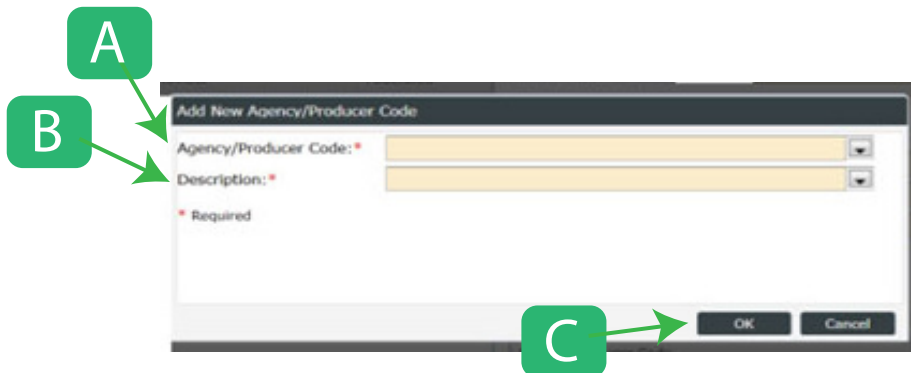


On the Credential Manager page:

- 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.

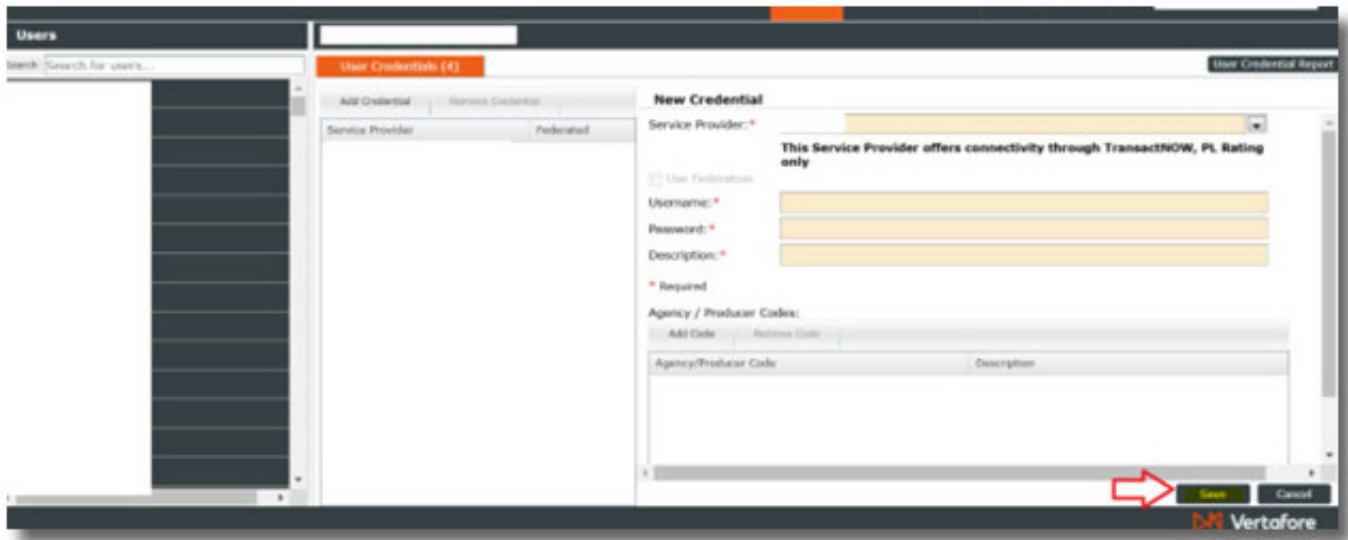
**Password:** This is the Password that you created in the Diamond System during the first part of this set-up process.



- 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

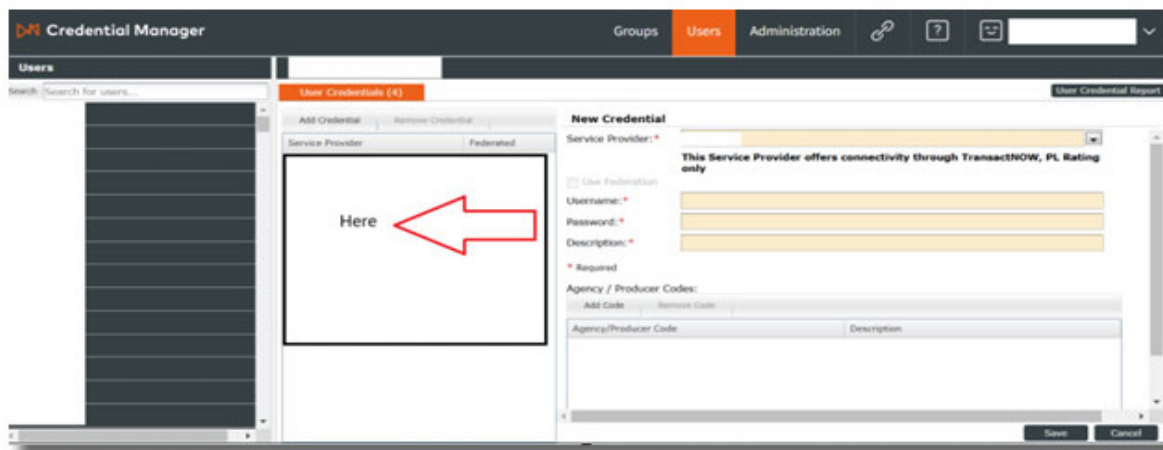
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A. Click “Save” button.

## Single Sign-on PL Rating

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- 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>