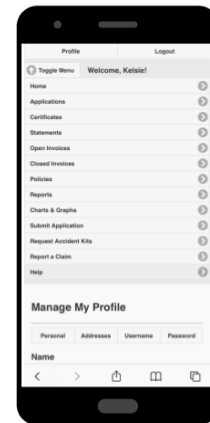




**Truckers**<sup>SM</sup>  
INSURANCE ASSOCIATES



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# AGENT PORTAL USER GUIDE

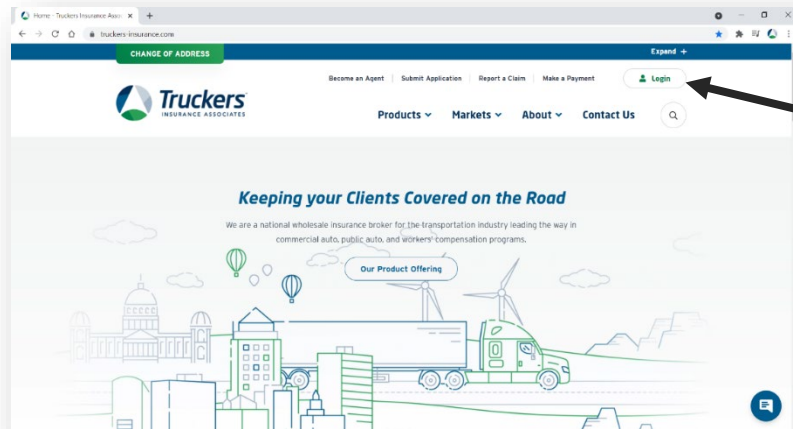
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## Create a Login

If you are a new user and need login information for the Truckers Insurance Associates Agent Portal visit [www.truckers-insurance.com/signup](http://www.truckers-insurance.com/signup). Complete the information on the page and you will receive your login information via email within 2 business days.

## Accessing the Portal

To access the Agent Portal, visit the Truckers Insurance Associates website ([www.truckers-insurance.com](http://www.truckers-insurance.com)) and click "Login" in the top right corner.



## Homepage

Once logged into the Agent Portal you are directed to the Homepage. This page shows some announcements from Truckers Insurance Associates as well a Production at a Glance box that shows your agencies current policy count and monthly premium invoiced activity over the last couple of years. At the bottom of the page you will see your account information.

**HOMEPAGE**

**Welcome**

We have updated our Agent Portal and added some new features. You are now able to view invoices, reports, and policies, as well as view custom reports, charts, and graphs.

If you have any questions, please email [marketing@truckers-insurance.com](mailto:marketing@truckers-insurance.com) or give us a call at (800) 652-9515.

**Make a Payment**

You can now make payments online. Save time and keep track of payments easier with our new system. [Click here](#) to make a payment.

Please contact Marie Blanchard, Accounting and Administration Manager at (800) 652-9515, Extension #2971 or via email at [mblanchard@truckers-insurance.com](mailto:mblanchard@truckers-insurance.com).

**PRODUCTION AT A GLANCE**

**Policy Count**

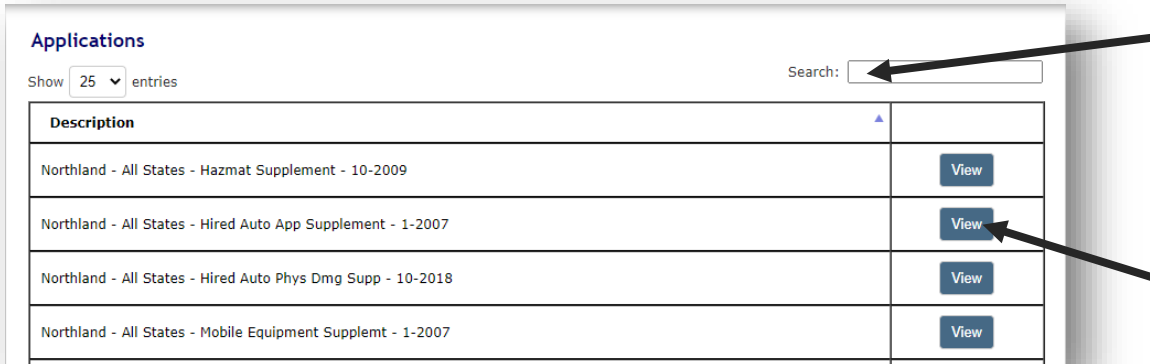
**Monthly Premium Invoiced Activity**

Some information about the user you have just signed in:

- Name -
- Email Address -
- Role -

## Applications

The applications tab lets you download all applications for Truckers Insurance Associates markets. Click the "View" button to download. You can also search for a specific application using the search box in the top right hand corner.

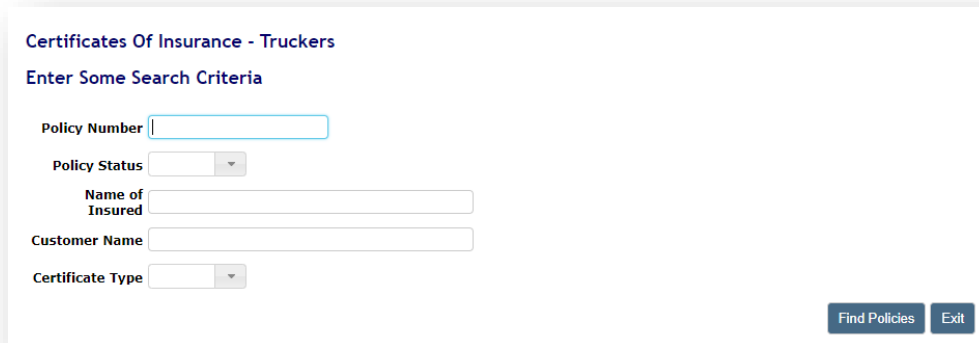


The screenshot shows the 'Applications' page. At the top left, it says 'Applications' and 'Show 25 entries'. On the top right, there is a search box with the label 'Search:'. Below this is a table with four rows. Each row has a 'Description' column and a 'View' button. The descriptions are: 'Northland - All States - Hazmat Supplement - 10-2009', 'Northland - All States - Hired Auto App Supplement - 1-2007', 'Northland - All States - Hired Auto Phys Dmg Supp - 10-2018', and 'Northland - All States - Mobile Equipment Supplemt - 1-2007'. Two black arrows point to the search box and the 'View' button for the second row.

Description	
Northland - All States - Hazmat Supplement - 10-2009	<a href="#">View</a>
Northland - All States - Hired Auto App Supplement - 1-2007	<a href="#">View</a>
Northland - All States - Hired Auto Phys Dmg Supp - 10-2018	<a href="#">View</a>
Northland - All States - Mobile Equipment Supplemt - 1-2007	<a href="#">View</a>

## Certificates

Under the Certificates tab you can update and create Certificates of Insurance. Start by searching for your policy using the search fields and select "Find Policies". A list of certificates will populate, click "Select" next to the policy you would like to access. From there, click "Select/Modify" next to the specific certificate and you are able to make changes, save and then create a PDF or email the certificate. Press "Exit" at any time to return to the Homepage.



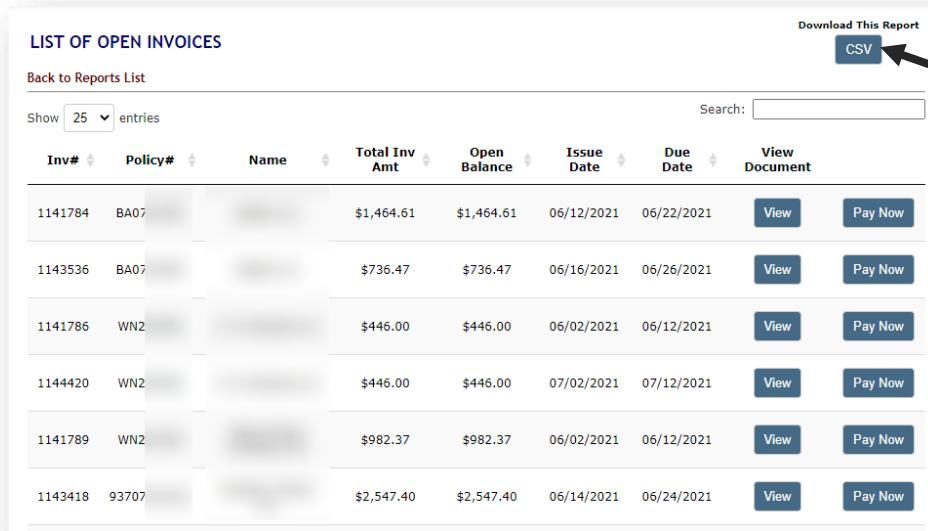
The screenshot shows the 'Certificates Of Insurance - Truckers' search form. It has the heading 'Enter Some Search Criteria'. There are five input fields: 'Policy Number' (text), 'Policy Status' (dropdown), 'Name of Insured' (text), 'Customer Name' (text), and 'Certificate Type' (dropdown). At the bottom right, there are two buttons: 'Find Policies' and 'Exit'.

## Statements

The statements tab allows you to view and download statements from Truckers Insurance Associates. You can view statements from April 2021 and after, if you need a statement from before April 2021 please contact our Accounting team.

## Open Invoices

The Open Invoices tab allows you to see information about invoices that have not been marked as paid. This tab will show you the invoice number, policy number, name of insured, total invoiced amount, open balance remaining, issue date, and due date. The "View" button on the right of each invoice allows you to download a PDF of the individual invoice and the "Pay Now" button takes you to our online payment portal where you can make an ACH payment. All invoices are searchable using the search box in the top right hand corner, or you can download the data into Excel by clicking the CSV button shown below.



Download This Report  
CSV

Back to Reports List

Show 25 entries Search:

Inv#	Policy#	Name	Total Inv Amt	Open Balance	Issue Date	Due Date	View Document
1141784	BA07		\$1,464.61	\$1,464.61	06/12/2021	06/22/2021	View Pay Now
1143536	BA07		\$736.47	\$736.47	06/16/2021	06/26/2021	View Pay Now
1141786	WN2		\$446.00	\$446.00	06/02/2021	06/12/2021	View Pay Now
1144420	WN2		\$446.00	\$446.00	07/02/2021	07/12/2021	View Pay Now
1141789	WN2		\$982.37	\$982.37	06/02/2021	06/12/2021	View Pay Now
1143418	93707		\$2,547.40	\$2,547.40	06/14/2021	06/24/2021	View Pay Now

Some information has been distorted to protect sensitive information.

## Closed Invoices

Similar to the Open Invoices tab, the Closed Invoices tab shows detailed information about invoices and lets you download a PDF version by clicking "View". This tab only shows invoices that have been paid.

## Policies

The policies tab shows a list of all your active policies including the policy number, description, name of insured, effective date, and policy expiration date. This information can be searched for using the search box and downloaded into a CSV Excel file as well by clicking the "CSV" button in the right hand corner. The "Contact Underwriter" button next to each policy can be clicked to send a message to the underwriter assigned to that specific policy. After clicking the button, a new box will pop up that will allow you to type a message. Our underwriting team will then reach out to you via phone or email.

**LIST OF POLICIES** Download This Report  
CSV

[Back to Reports List](#)

Show  entries Search:

Policy#	Policy Desc	Name of Insured	Policy Effective	Policy Expire	
22160	Commercial Truck		07/16/2020	07/16/2021	Contact Underwriter
WN2	Commercial Truck		07/18/2020	07/18/2021	Contact Underwriter
WN2	Commercial Truck		07/20/2020	07/20/2021	Contact Underwriter
WN2	Commercial Truck				

**Contact Underwriter**

Please add a message to Underwriter and click 'Send Email'.

**Reports**

Under the reports tab you will see two different options. The first is the Commissions Per Year Report and the second is the Invoiced Premium Report. Press "Go" to run the report you wish to view. After selecting the Commissions Per Year Report you will be asked to enter a year, after typing the year, click "Get Report"

**Real Time Reports**

Show  entries Search:

Report	Action
Commissions Per Year	<input type="button" value="Go"/>
Invoiced Premium	<input type="button" value="Go"/>

Showing 1 to 2 of 2 entries Previous  Next

**COMMISSIONS PER YEAR** Download This Report  
CSV

[Back to Reports List](#)

Show  entries Search:

Year (in the format YYYY)

Showing 1 to 1 of 1 entries Previous  Next

[Back to Reports List](#)

The commissions per year report will show you a line by line detailed list of all commissions that year. Each line will show the customer name, policy number, effective billing date, premium amount, commission amount, and commission percentage. If you would like to sort this data, it is recommended you download this report using the top right hand corner "CSV" button.

The Invoiced Premium report will list out all invoiced premium information, including customer name, policy number, invoice number, transaction date, if the invoice is paid or not, date payment was received, and invoiced premium amount. You can also download this report into Excel by clicking the "CSV" button in the top right hand corner.

By clicking the arrows of each row header you can sort by that column, you can also search for a specific number or customer by using the search box in the top right hand corner.

## Charts & Graphs

The Charts & Graphs tab allows you to view valuable information about your agency. There are six different views you can select from by clicking "Go" next to each name. The different options are listed below:

- Volume by Market
- Volume by State
- Volume by Product Segment
- Policy Count by Month/Year
- Monthly Invoiced Premium Activity
- New Business Submission Activity.

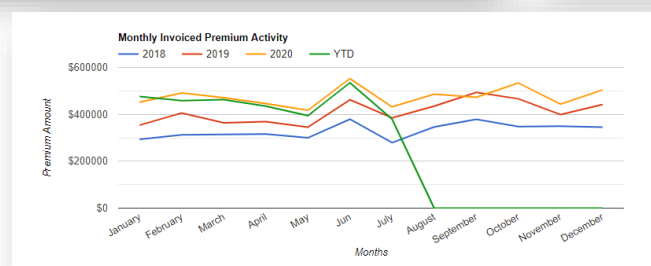
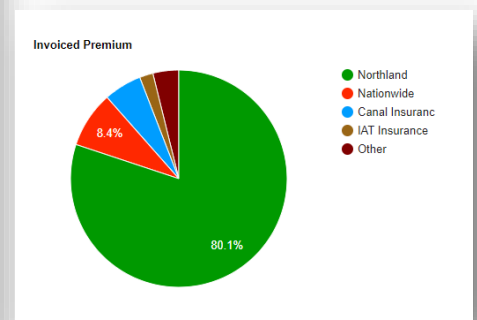
By hovering over parts of the page you can see specific numbers, for example if you hover over a pie chart you can see the value of that piece of the pie. Please note that data for a YTD line will drop to 0 for months that have not yet occurred.

**Charts & Graphs**

Show 25 entries Search:

Dashboard	Action
1. Volume by Market	<a href="#">Go</a>
2. Volume by State	<a href="#">Go</a>
3. Volume by Product Segment	<a href="#">Go</a>
4. Policy Count by Month/Year	<a href="#">Go</a>
5. Monthly Invoiced Premium Activity	<a href="#">Go</a>
6. New Business Submission Activity	<a href="#">Go</a>

Showing 1 to 6 of 6 entries Previous 1 Next



### **Submit Application**

This tab takes you to a form where you can request a quote by submitting an application. You can request a quote anytime at [www.truckers-insurance.com/quote](http://www.truckers-insurance.com/quote). Please note that quotes are only received during normal business hours and must be reviewed by our underwriting team.

### **Request Accident Kits**

This tab takes you to a form where you can request additional accident kits from Northland or Nationwide Insurance. You can also visit [www.truckers-insurance.com/kits](http://www.truckers-insurance.com/kits) at any time to make this request.

### **Report a Claim**

The Report a Claim page provides information about claims for all of markets including phone numbers, emails and online claim links when available. This information is available anytime at [www.truckers-insurance.com/claims](http://www.truckers-insurance.com/claims)

### **Disclaimer**

Information on the Agent Portal is secure and access is only given to users that have been approved by the agency. If an employee is no longer with your agency, please contact [marketing@truckers-insurance.com](mailto:marketing@truckers-insurance.com) or call us at (800) 652-9515 to revoke access to a user.

Truckers Insurance Associates is not responsible for information shared by a user.