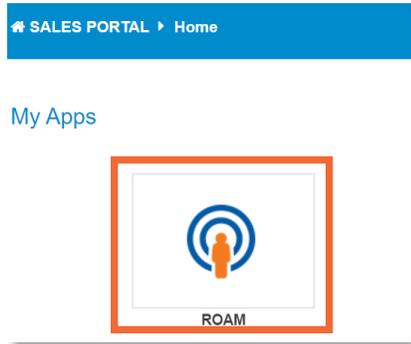
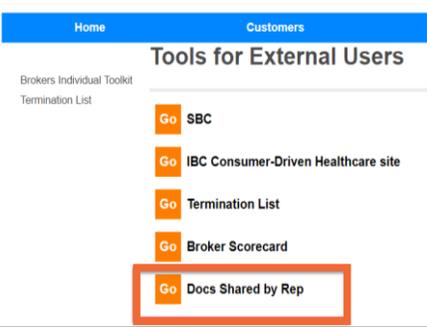


# Secure Upload Document Feature

## Overview

The New Secure Upload feature allows Sales Reps to share secure documents with primary and producing agencies. Below are the steps used to upload and retrieve the secure documents.

Steps	Screenshots
<p>1. Log into Sales Portal and Click on the ROAM applet.</p>	 <p>The screenshot shows the 'SALES PORTAL Home' header. Under 'My Apps', the 'ROAM' applet icon, which features a person inside a target symbol, is highlighted with an orange border.</p>
<p>2. Click on the Tools Menu</p>	 <p>The screenshot shows a blue 'Tools' button highlighted with an orange border.</p>
<p>3. Click on the <b>Go</b> button associated with <i>Docs Shared by Rep</i></p>	 <p>The screenshot shows the 'Tools for External Users' page. Under the 'Brokers Individual Toolkit' section, the 'Go Docs Shared by Rep' button is highlighted with an orange border.</p>
<p>4. At the Docs Shared by Rep page, click one of the options and proceed with the instructions below:</p> <ul style="list-style-type: none"> <li>- <i>Primary Agency Only Folder</i></li> <li>- <i>Primary and Producing Agency Folder</i></li> </ul> <p><b>*Note*</b></p> <ul style="list-style-type: none"> <li>- <i>The system defaults to the Primary Agency Only Folder option.</i></li> <li>- <i>Producing Agents are navigated directly to the folder in the Document Center containing their secure documents. No selection is required.</i></li> </ul>	 <p>The screenshot shows the 'Docs Shared by Rep' page. The 'Primary Agency Only Folder' radio button is selected and highlighted with an orange border. Below, the 'Primary Agency' dropdown is set to 'PA08511A - Emerson Reid dba CBDI' and the 'Producing Agency' dropdown is set to 'NONE'. A 'Next' button is visible at the bottom.</p>

## Primary Agency Only Folder option

1. To navigate to the folder in the Document Center that contains secure documents for the Primary Agency Only, select the *Primary Agency Only Folder* option, and then click the *Next* button.

### Docs Shared by Rep

Primary Agency Only Folder

Primary and Producing Agency Folder

Primary Agency: PA11111A - Broker1

Producing Agency: NONE

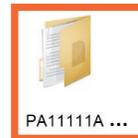
Next

2. To download your secure documents prior to the expiration date, click on the ellipses to the right of the document name.

**\*Note\***

- All files in the folder will automatically be removed **5 days** after the upload date.

### Document Center



Please note all files in this folder will be automatically deleted from this folder after 5 calendar days from upload

#### Documents

test1 Rep Test Account, modified 3 days ago  
Test Document  
Approved

## Primary and Producing Agency Folder option

1. To navigate to the folder in the Document Center that contains secure documents for the Primary and Producing Agencies Only, select the *Primary and Producing Agency Folder* option, and then click the *Next* button.

**\*Note\***

- The system defaults to the Primary Agency Only Folder option.

### Docs Shared by Rep

Primary Agency Only Folder

Primary and Producing Agency Folder

Primary Agency: PA11111A - Broker 1

Producing Agency: PA22222A - Broker 2

Next

2. To download your secure documents prior to the expiration date, click on the ellipses to the right of the document name.

**\*Note\***

- All files in the folder will automatically be removed **5 days** after the upload date.

### Document Center



Please note all files in this folder will be automatically deleted from this folder after 5 calendar days from upload

#### Documents

test1 Rep Test Account, modified 3 days ago  
Test Document  
Approved