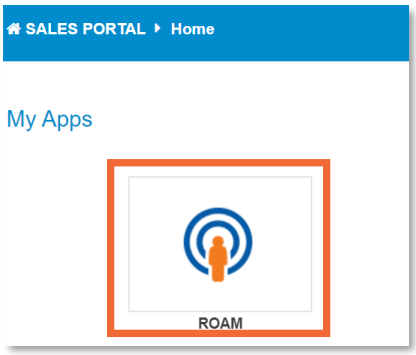
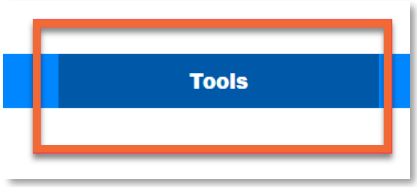
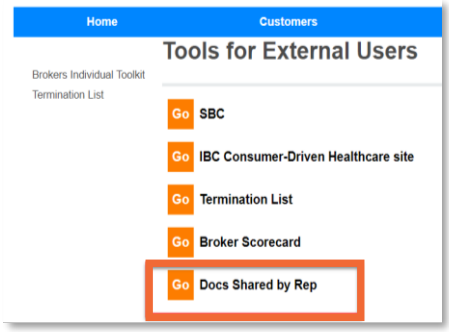
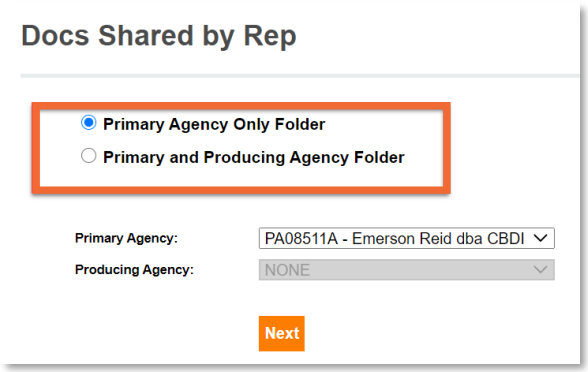
Secure Upload Document Feature

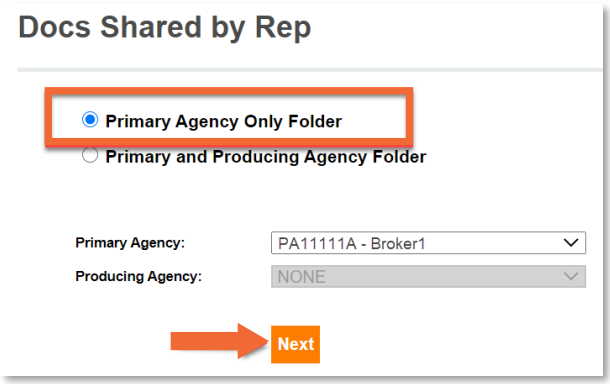
Overview

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
1. Log into Sales Portal and Click on the ROAM applet.	
2. Click on the Tools Menu	
3. Click on the Go button associated with *Docs Shared by Rep*	
4. At the Docs Shared by Rep page, click one of the options and proceed with the instructions below: - *Primary Agency Only Folder* - *Primary and Producing Agency Folder* ***Note*** - *The system defaults to the Primary Agency Only Folder option.* - *Producing Agents are navigated directly to the folder in the Document Center containing their secure documents. No selection is required.*	

Primary Agency Only Folder option

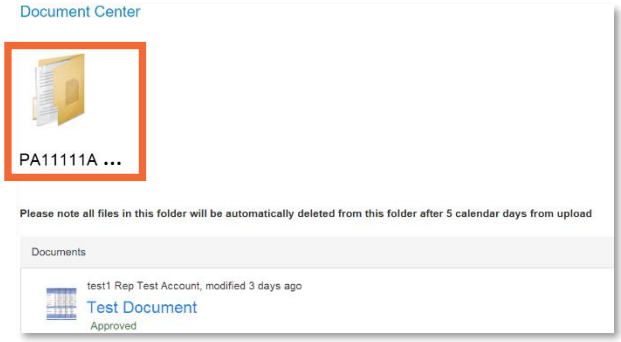
1. To navigate to the folder in the Document Center that contains secure documents for the Primary Agency Only, select the *Primary Agency Only Folder* option, and then click the *Next* button.



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.*

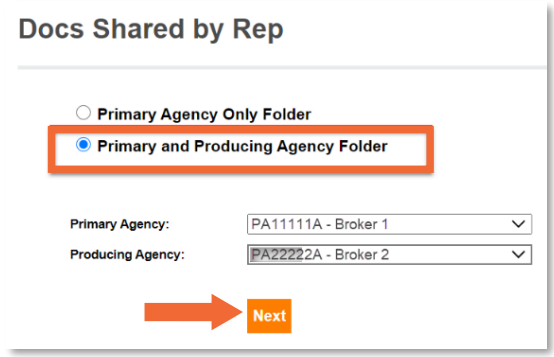


Primary and Producing Agency Folder option

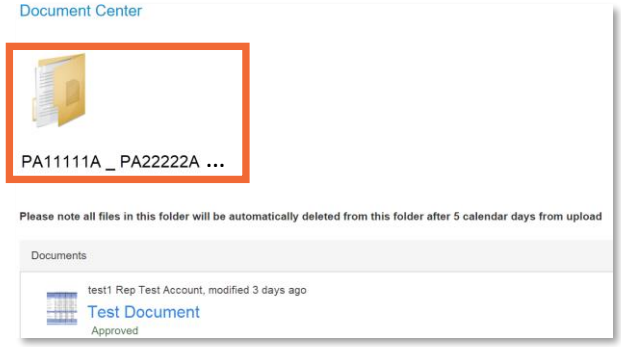
1. To navigate to the folder in the Document Center that contains secure documents for the Primary and Producing Agencies Only, select the *Primary and Producing Agency Folder* option, and then click the *Next* button.

Note

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



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.*