

AGENT PORTAL GUIDE/INSTRUCTIONS

Summary: This document contains the instructions for the proper use and functionality of your Agent Portal

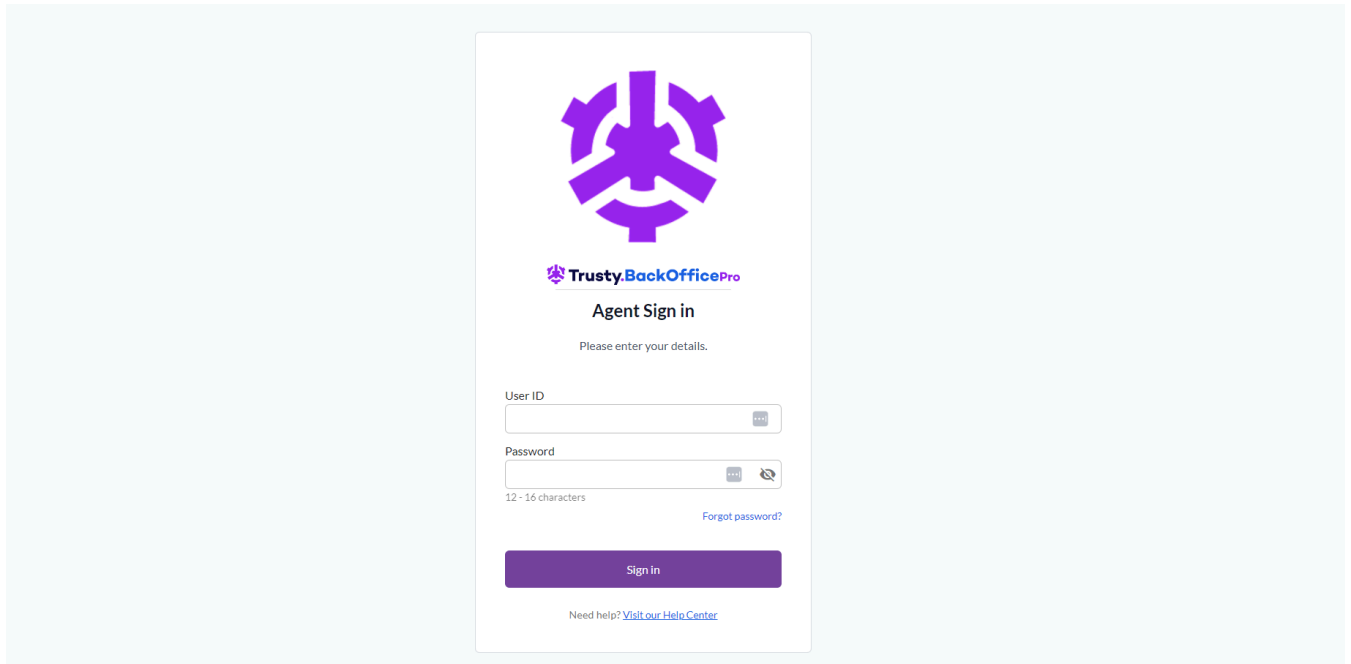
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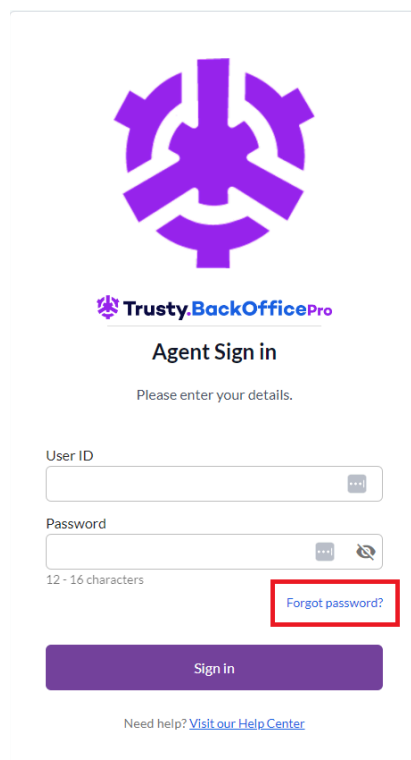
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How do I reset my Agent Portal Password?

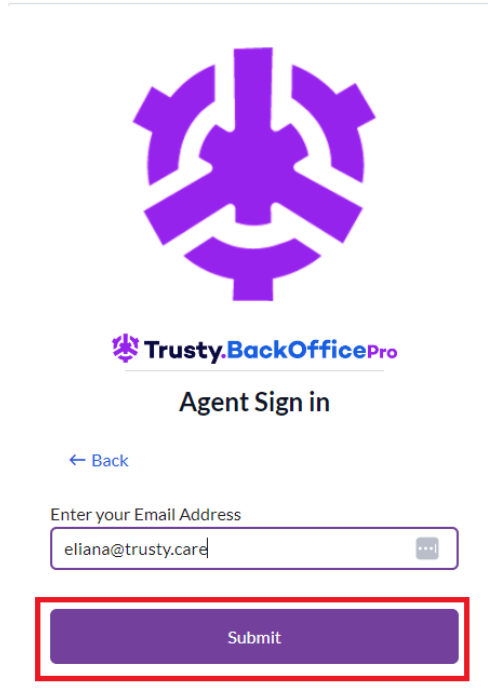
1. Navigate to the login screen of your Agent Portal. Please ask your FMO representative to provide the link to this login screen:



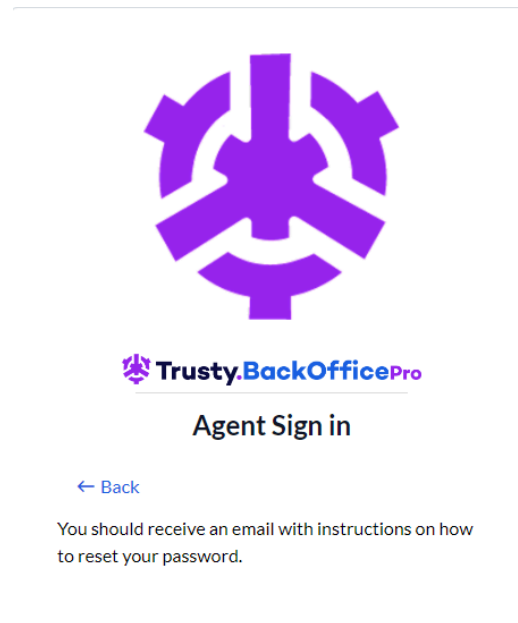
2. To reset your password, click on "Forgot password?"



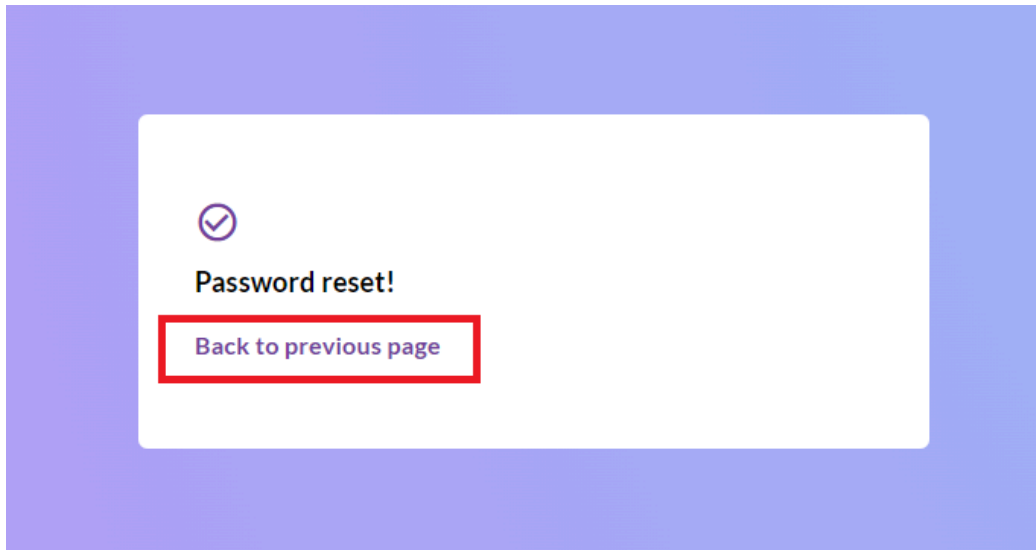
3. Enter the email address associated with your Agent Portal account (this is also your username) and click “Submit”



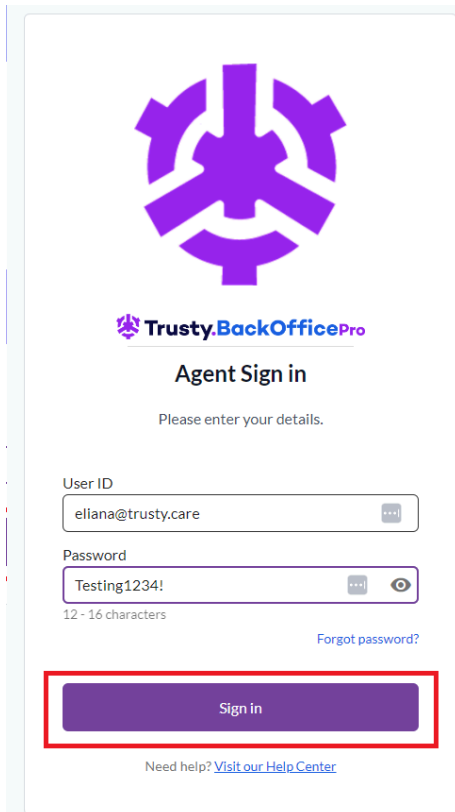
4. Enter the email address associated with your Agent Portal account (this is also your username) and click “Submit”. You should now see the following confirmation screen.



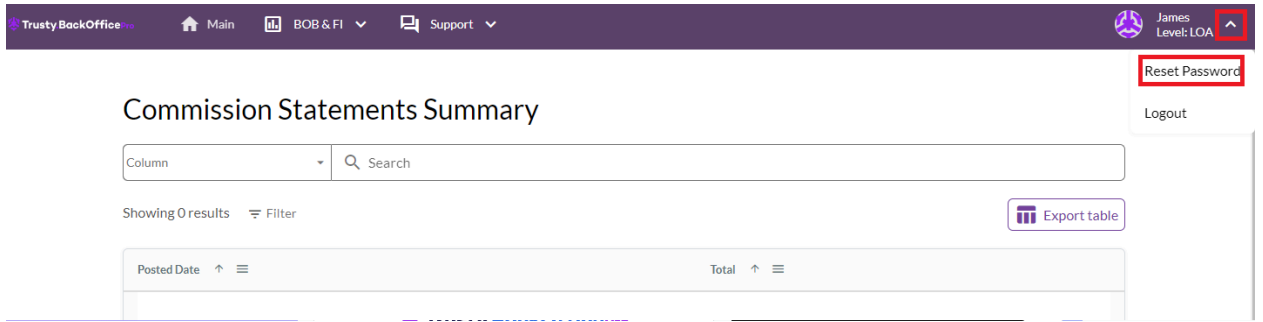
5. You should also receive an email from info.tbop - with the following subject: [Account] TBOP Account Information - Please check your spam folder, you might have to add the recipient to



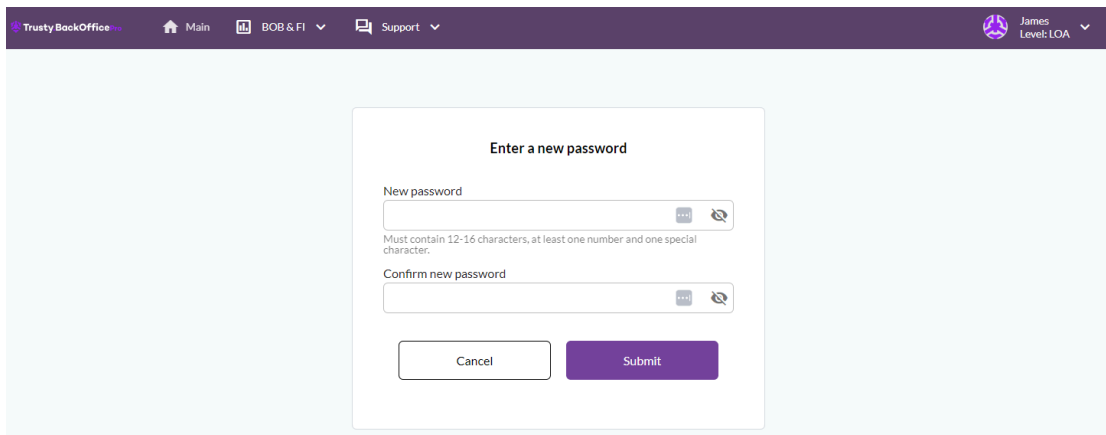
8. Now you will see the login screen, add the password and your email address as username



9. Now you should have access to your Agent Portal!
10. Once you have access to the portal and you want to change your password. you can do so by clicking on the arrow next to your name on the top right-hand corner

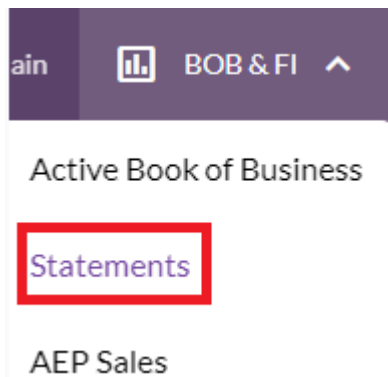


11. The same way as before, you can reset your password and click “Submit”

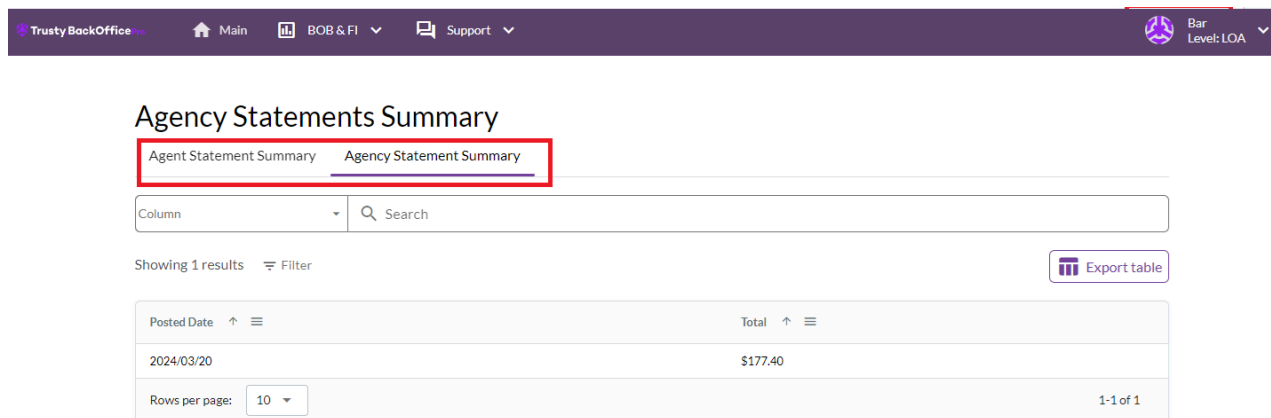


How do I view and download Commission Statements?

1. To access your Commission Statements, navigate to BOB & FI > Statements



2. If you are a principal, you will see “Agent Statement Summary” and “Agency Statement Summary” - If you are a principal that is being paid separately from your agency pay, you will see statements separate by Agency and Agent. If you are getting paid with the overrides, then it will be under Agency Statement. If you need to configure this, please reach out to your FMO.



Trusty BackOfficePro Main BOB & FI Support Bar Level: LOA

Agency Statements Summary

Agent Statement Summary **Agency Statement Summary**

Column Search

Showing 1 results Filter Export table

Posted Date ↑	Total ↑
2024/03/20	\$177.40

Rows per page: 10 1-1 of 1

3. To check out the detailed commission statement, click on the post date for details. You can also click on “Export Table” to download a report of Post Date and Payment.

Agency Statements Summary

Agent Statement Summary Agency Statement Summary

Column Q Search

Showing 1 results Filter

Posted Date	Total
2024/03/20	\$177.40

Rows per page: 10 1-1 of 1

 Export table

4. When you click on the date, you will see Statement Details for that Date:

[← Agency Statements Summary](#)

Agency Statements Detail: 2024-03-20

Column Q Search

Showing 10 results Filter

Post Date	Pay Out Date	Pay Type	For	Agency	Agent	Agent Pay	Carrier	Plan Type	Policy Holder	Eff
2024-03-20	2024-03-20	CB	Agency Service Fee	Howarden	Ibert, Bar	-\$9.60	Aetna	PDP	Paul, Erinn	20
2024-03-20	2024-03-20	CB	Agency Service Fee	Howarden	Squires, Cornall	-\$9.60	Aetna	MAPD	Ricardet, Dally	20
2024-03-20	2024-03-20	CB	Agency Service Fee	Howarden	Squires, Cornall	-\$1.00	Aetna	PDP	Petrollo, Worden	20
2024-03-20	2024-03-20	CB	Agency Service Fee	Howarden	Ibert, Bar	-\$1.00	Aetna	MAPD	Zollner, Leon	20
2024-03-20	2024-03-20	NB	Agency Service Fee	Howarden	Ibert, Bar	\$1.00	Aetna	PDP	Concklin, Reidar	20
2024-03-20	2024-03-20	NB	Agency Service Fee	Howarden	Ibert, Bar	\$1.00	Aetna	PDP	Cothey, Penrod	20
2024-03-20	2024-03-20	NB	Agency Service Fee	Howarden	Squires, Cornall	\$1.00	Aetna	PDP	Diggons, Rhianna	20
2024-03-20	2024-03-20	NB	Agency Service Fee	Howarden	Squires, Cornall	\$1.00	Aetna	PDP	Francescozzi, Kaylee	20
2024-03-20	2024-03-20	NB	Agency Service Fee	Howarden	Ibert, Bar	\$1.00	Aetna	PDP	Frankiewicz, Filippa	20
2024-03-20	2024-03-20	NB	Agency Service Fee	Howarden	Squires, Cornall	\$1.00	Aetna	PDP	Gachen, Mervin	20


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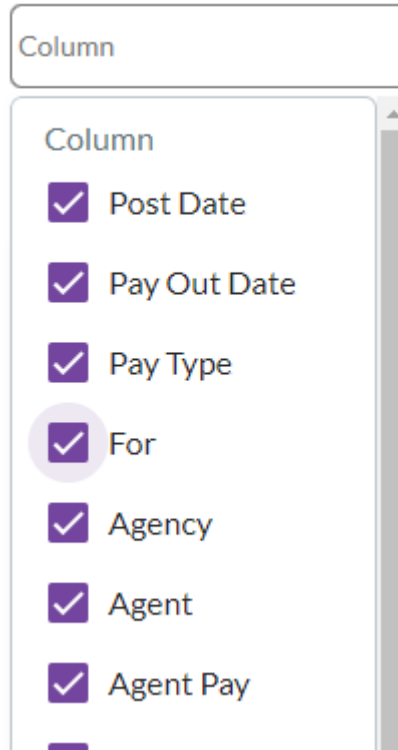
Payout Total: \$177.40

5. From this screen you can:

- a. Use the Search Bar to search for policyholder name

Q Search

- b. Use any of the burger icons for filtering columns 
- c. Select the columns that you want to see on your report



- d. Download a report of all lines matching filter - Select "Export Table" - "Download all rows matching filter as XLSX"

