

New Agency Setup

Founded in 2005, Appulate provides a best of breed bridging technology that allows retail agents to send ACORD, supplemental, loss and other data to carriers, wholesale brokerages, MGA and TPA receivers. Using the ACORD XML standards, Appulate offers an unprecedented level of connectivity to streamline business processes. The combination of our advanced technology, outstanding service and experienced team allow us to create products and services with a high value proposition.

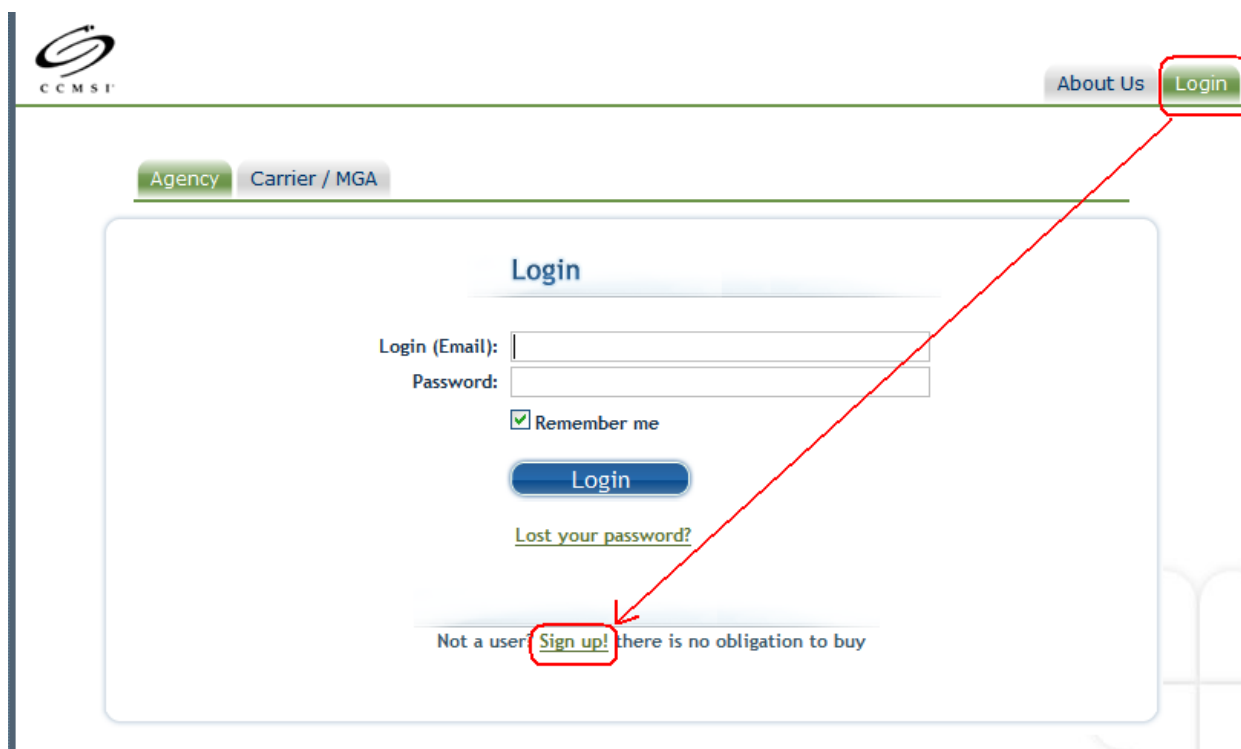
These instructions will help you set up Appulate's Uplink technology, allowing you to export customer data out of your agency system for submission to CCMSI.

****These instructions are not for agencies already using the Appulate Uplink with other markets.**

Step 1

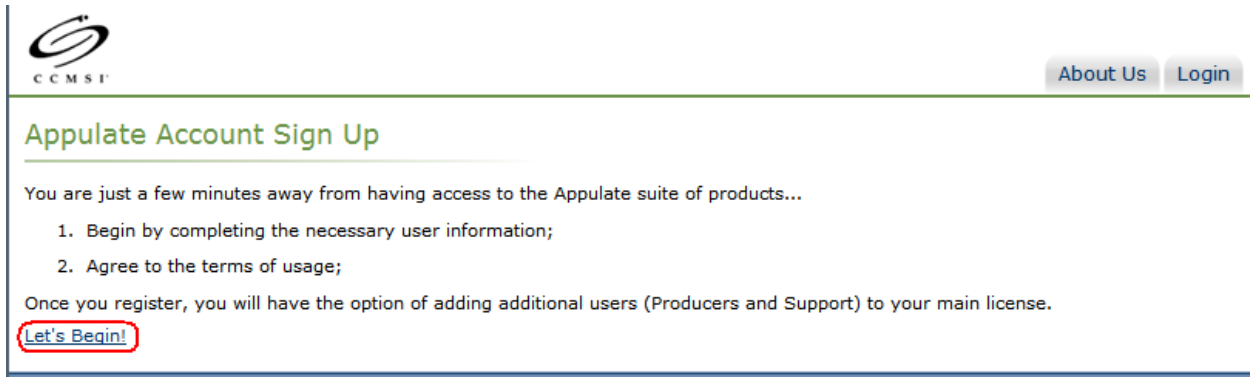
Open Internet Explorer (version 7 or later) and navigate to <http://ccmsi.appulate.com>

- Click on the Login tab at the top of the screen
- Click on the Sign Up link



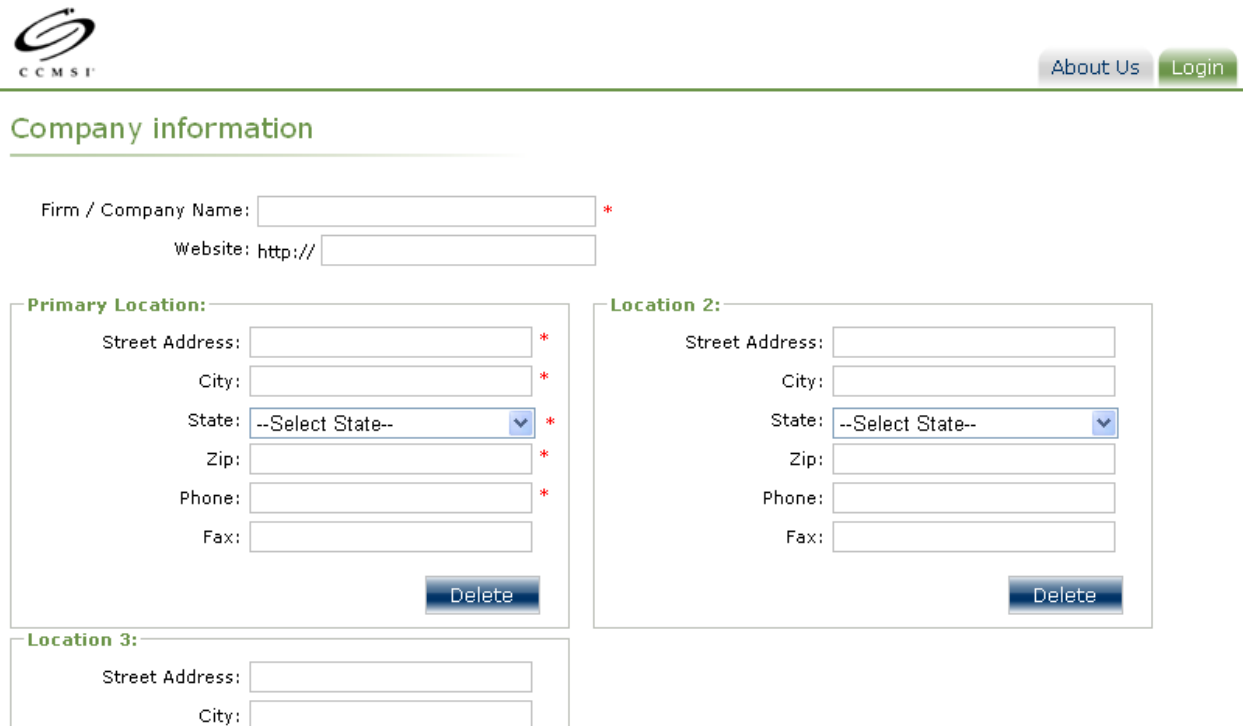
The screenshot shows the Appulate website interface. At the top left is the CCMSI logo. At the top right, there are two tabs: "About Us" and "Login", with the "Login" tab highlighted in green and circled in red. Below the tabs, there are two buttons: "Agency" and "Carrier / MGA", with "Agency" highlighted in green. The main content area is titled "Login" and contains a form with the following elements: "Login (Email):" followed by a text input field, "Password:" followed by a text input field, a checked checkbox labeled "Remember me", a blue "Login" button, and a link labeled "Lost your password?". At the bottom of the form, there is a link labeled "Sign up!" which is circled in red. A red arrow points from the "Login" tab at the top right to the "Sign up!" link at the bottom of the form. Below the "Sign up!" link, the text "Not a user? there is no obligation to buy" is visible.

Follow the instructions through the signup screens to setup your account for your agency. **Your username is your email address.**



The screenshot shows the 'Appulate Account Sign Up' page. At the top left is the CCMSI logo. At the top right are 'About Us' and 'Login' buttons. The main heading is 'Appulate Account Sign Up'. Below it, a message states: 'You are just a few minutes away from having access to the Appulate suite of products...'. A numbered list follows: '1. Begin by completing the necessary user information;' and '2. Agree to the terms of usage;'. Below the list, it says: 'Once you register, you will have the option of adding additional users (Producers and Support) to your main license.' At the bottom left, there is a red-bordered button labeled 'Let's Begin!'.

1.



The screenshot shows the 'Company information' form. At the top left is the CCMSI logo. At the top right are 'About Us' and 'Login' buttons. The main heading is 'Company information'. Below it, there are input fields for 'Firm / Company Name:' (with an asterisk) and 'Website: http://'. Below these are three location sections: 'Primary Location:', 'Location 2:', and 'Location 3:'. Each location section contains input fields for 'Street Address:', 'City:', 'State:' (a dropdown menu with '--Select State--'), 'Zip:', 'Phone:', and 'Fax:'. Each of these fields has an asterisk. Below each location section is a 'Delete' button.

2.



User information

User info

First Name: *

Last Name: *

Phone: *

Fax:

Email: *

Email Confirmation: *

You must provide a valid email address. Your email will also be your Appulate login.

Password information

Please enter and verify a new password below.

Please remember that your new password:

- Must be at least 5 characters long
- Cannot equal or contain your username
- Is case-sensitive

New Password:

Confirm Password:

3. This step is where you'll enter the agency code provided by CCMSI



CCMSI's Settings

Please enter your login for CCMSI to enable electronic submissions and auto-login.

Identification information assigned to your agency or brokerage firm by the insurance company.

Code:

Subcode:

If your agency uses a sub-code identification system with the company, enter the appropriate code

Please select your markets:

- [Select all](#) [Unselect all](#)
- LEMIC Insurance Company

Step 3 out of 4

4.



Confirmation

Company Information:

Firm / Company Name:
Website:

Primary Contact:

Name:
Phone:
Email:

#	State	Street	City	Zip code	Phone	Fax	Primary address

Step 4 out of 4

Edit

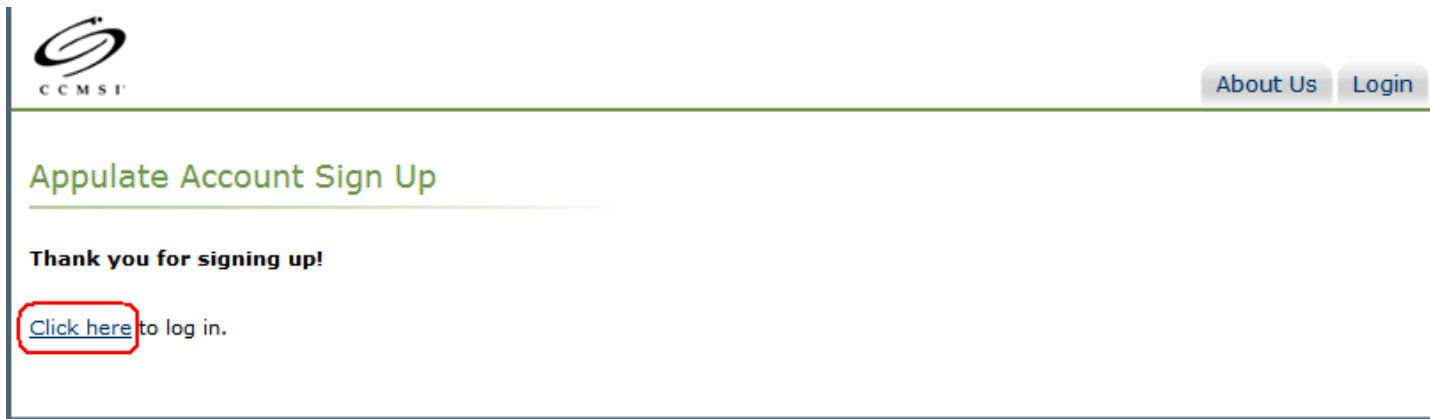
Master Subscription Agreement

Master Subscription Agreement

BY CLICKING THE "I ACCEPT" BUTTON DISPLAYED AS PART OF THE ORDERING PROCESS, YOU MAKE APPLICATION TO USE APPULATE'S ONLINE SERVICE (THE "SERVICE") AND YOU AGREE TO THE FOLLOWING TERMS AND CONDITIONS (THE "AGREEMENT") GOVERNING YOUR USE OF THE SERVICE. ACCEPTANCE OF YOUR APPLICATION TAKES PLACE IN AGOURA HILLS, CALIFORNIA AND THAT ACCEPTANCE IS EVIDENCED BY THE REPLY E-MAIL SENT BY APPULATE TO CONCLUDE THE

Step 2

After completing the signup you'll be logged into Appulate where you can complete the rest of the setup for your agency.



At this point you've setup an account for your agency to use the Appulate Uplink to submit information to CCMSI. You've also setup a username and password for yourself.

If there are others in your agency that will need to upload to CCMSI programs then they will also need a unique username. Once logged into the website you can add more users to your agency's account by

clicking on the Setup tab and then the Add New User button. Each user's email address will be their username.

CCMST Customers Renewals Markets Loss Runs Inbox (0) **Setup** Tools Help [Logout](#)

Administration

Company Services Tools

Users

Add New User - All - A B C D E F G H I J K L M N O P Q R S T U V W X Y Z #
Security Level: Low Shared Show inactive users Location: None Role: None

First Name	Last Name	Phone	Email	Location	Role	Status	Edit

As you add more users they will receive an email with a link so they can set a password for their username.

Step 3

As each person sets their password they will be automatically logged into the website where they can download and install the Uplink.

CCMST Customers Renewals Markets Loss Runs Inbox (0) Setup Tools Help [Logout](#)

Customers

Add New Customer View: By Status Appulate Uplink
From your agency management system to Appulate with one click...

All (0) Customers (0) Prospects (0) Former Customers (0)

Search Clear - All - # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Show my 10 latest customers only

No Data.

By clicking on the Uplink banner you'll be taken to the download page where there are instructions on how to install the Uplink depending on your network configuration, etc.



Appulate Uplink

[Installation Instructions](#)

Operating System Requirements: Windows 2000, Windows XP, Windows 2003, Windows Vista
 Appulate Uplink should be installed under an Administrator privileged user account.

Select your agency management system:

AfW 4.5

[Download](#)

The Appulate Uplink is a virtual printer that makes it easy to "print" customer information directly from your agency management system right into the Appulate customer database. Appulate does all the work of creating a new customer record or matching the information with an existing customer. The Appulate Uplink is free for all users!

Currently the Appulate Uplink supports the following Agency Management Systems. Click on the appropriate link next to the one you are using for instructions on how to print from your agency management system to Appulate.

Note: The agency management systems and ACORDs supported are listed in the table below.

	2	45	80	90	125	126	127	129	130	131	140	146	147	160	163	Manual
AfW 4.5																
AfW 5.2																
AfW 5.3																
AMS 360																
AMS Prime																

Once you've downloaded the Uplink you can logout of Appulate. If the Uplink is correctly installed it should show up in your list of printers. You can check by going to Control Panel -> Printers & Faxes.