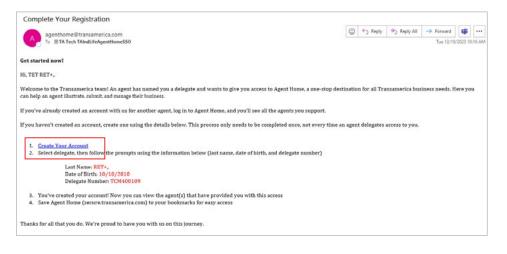
## HOW TO ASSIGN DELEGATES TO AGENT HOME

## FOLLOW THESE STEPS FOR EASIER BUSINESS MANAGEMENT

- 1. Adding a delegate
  - A. Under Delegate Management, click on "Add New Delegate."

AMERICA 🏫				Delegate Management
ELCOME,		1		
IGELA WALKER				ALC: NO
			and the second second	Contract of the local division of the local
Delegate Profiles				
Name	Email	Delegate ID	⊕ Add New	Delegate
SETH MEYERS	SMEYERS@TEST.COM	TCM400003	Ø EDIT	OF DELETE
		TCM400004	Ø EDIT	IT DELETE
SALLY MICHAELS	KATHY STOUTI @TRANSAMERICA.COM	TCM400004	2 EDIT	Borrie
SALLY MICHAELS SUDEEPTA SAHA	KATHY STOUTI @TRANSAMERICA.COM	TCM400021	Ø EDIT	() DELETE

- B. To search for an existing or add a new delegate
  - i. To search for an existing delegate: Search using Delegate ID, first name, last name, date of birth, ZIP code, email, and/or phone number. If your delegate exists, their name will populate on the existing list.
  - ii. Add a new delegate: Click **"Add New Delegate,"** then enter the identifying information (same as above)
- C. You can also provide and update entitlements while adding or updating a delegate.
- D. If a delegate is no longer with your organization, you can remove the delegate from your assigned list.
- 2. Once you add a new delegate, the delegate will receive an email to register, which includes all the necessary information and a secure link to create your account and register for Agent Home access.





01/24

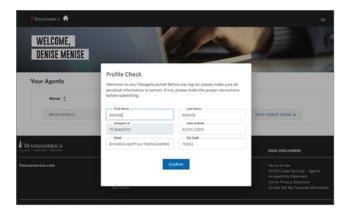
3. The link will take the new delegate to a page within Agent Home where they can create an account.

INDIVIDUAL FINANCIAL PROFESSIONIAL EMPLOYER		<b>1 800 797 2643</b>
TRANSAMERICA PRODUCTS	ABOUTUS CONTACT Q SEARCH	E LOGIN
Create Your Secure Account		
Step 1 of S	-	
Lest Name*		
Date of Birth*		
MMODININY		
Delegate Number*	Sierr I	
	-	
Help Us Protect Your Information		
Please enter the CAPTCHA below to continue the verification pro	oris.	
ETA		
Type the moving characters*		
		Required Fields
Concel NEXT		

**4.** After registering with Agent Home, the new appointed delegate will receive an email similar to the one below with a link to Agent Home.

Complete Your Registration						
agenthome@transamerica.com	0	5 Reply	(B) Reply 21	-> Forward	ų,	
To IDTA Tech TAIndUfeAgentHomeSSO				Tue 12/19	W2023 1	0:16 AA
Got started now!						
HL TET RET+,						
Welcome to the Transamerica team! An agent has named you a delegate and wants to give you access to Agen can help an agent illustrate, submit, and manage their business.	t Horne, a one-stop destinati	on for all Tri	anzamerica buz	iness needs. H	fere ye	90
If you've already created an account with us for another agent, log in to Agent Home, and you'll see all the age	nts you support.					
If you haven't created an account, create one using the details below. This process only needs to be completed	once, not every time an age	nt delegates	access to you.			
1. Create Your Account						
2. Select delegate, then follow the prompts using the information below (last name, date of birth, and del	egate number)					
Last Name: RET+,						
Date of Birth: 10/10/2010						
Delegate Number: TCM400109						
3. You've created your account! Now you can view the agent(s) that have provided you with this access						
4. Save Agent Home (secure.transamerica.com) to your bookmarks for easy access						

**5.** When the delegate logs into their account for the first time (after registration), they'll need to confirm all their identifying information.



**6.** When logged into their account, the delegate can view the associated list of agents and access their book of business based on the entitlements.

## Website Technical Support:

Monday through Friday, 9:00 AM to 7:00 PM EST **Call:** 866-301-2473



