Transamerica®

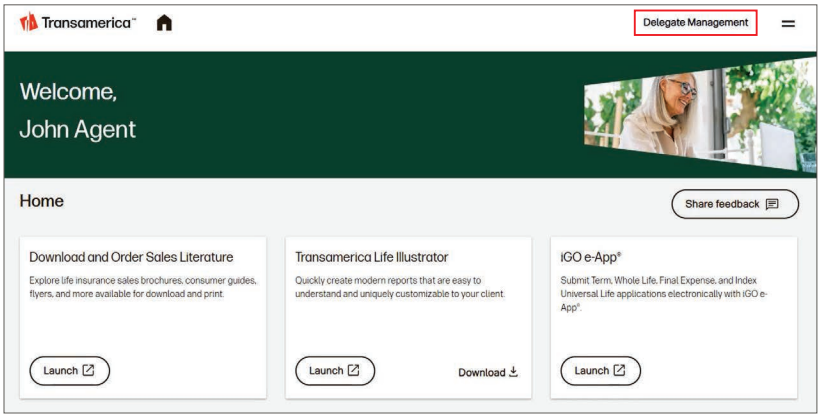
How to assign delegates to Transamerica Sales & Service Hub

Follow these steps for easier business management



1. Adding a delegate:

A. Under **“Delegate Management,”** click on **“Add New Delegate.”**



B. To search for an existing or add a new delegate

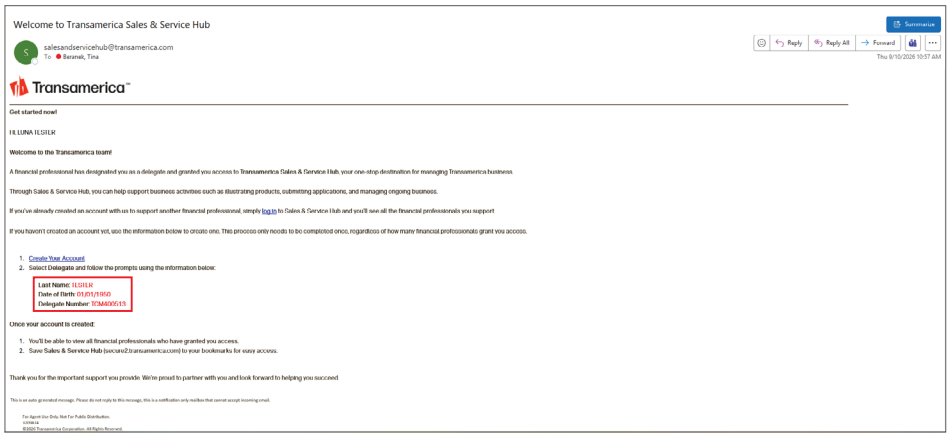
i. To search for an existing delegate: Search using the delegate’s ID, first name, last name, date of birth, ZIP code, email, and/or phone number. If your delegate exists, their name will populate on the existing list.

ii. Add a new delegate: Click **“Add New Delegate,”** then enter the identifying information (same as above).

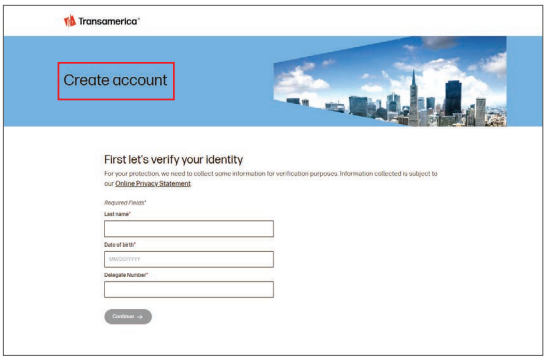
C. You can also provide and update entitlements while adding or updating a delegate.

D. If a delegate is no longer with your organization, you can remove the delegate from your assigned list.

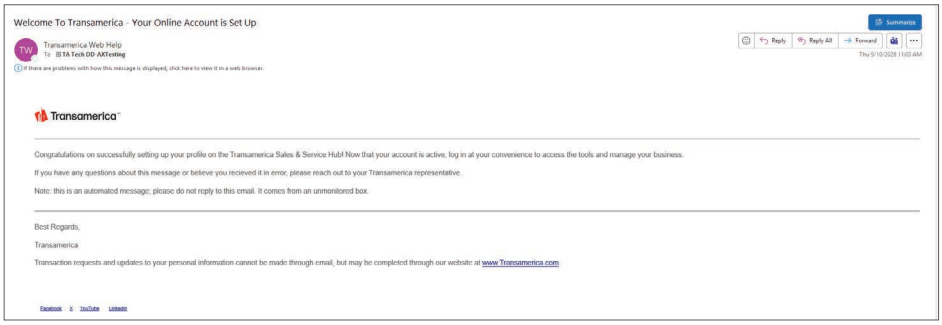
2. Once you add a new delegate, the delegate will receive an email to register that includes all the necessary information and a secure link to create their account and register for Transamerica Sales & Service Hub access.



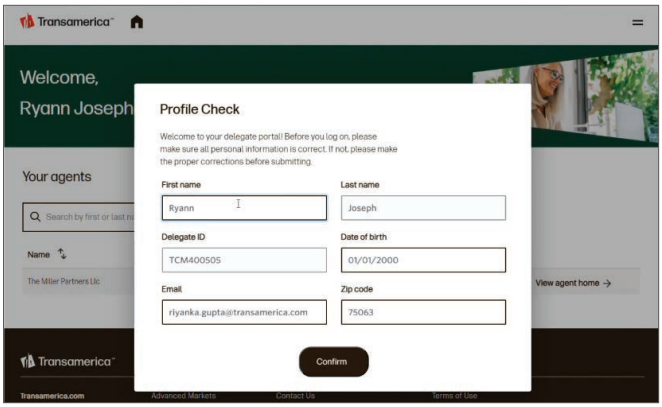
3. The link will take the new delegate to a page within Transamerica Sales & Service Hub where they can create an account.



4. After registering with Transamerica Sales & Service Hub, the newly appointed delegate will receive an email with a link to the site.



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 their assigned entitlements.

Website technical support:

Monday through Friday, 9:00 a.m. to 7:00 p.m. ET

Call **866-301-2473**

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