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"

Welcome,			Sec.		
John Agent					
Delegate Profiles Q, Search by first or last name, or email, or ID number					
Delegate Profiles	s, or email, or ID number			Add new delegate 올*	
Delegate Profiles Q. Search by first or last name Name	e, or email, or ID number	Delegate ID 🔩	I	Add new delegate &*	
Delegate Profiles	n, or email, or ID number Email 1	Delegate ID 🔩	Edit /	Add new delegate 2*	
Delegate Profiles	n, or email, or ID number Email *_ test.delegate3@Test.com test.delegate4@Test.com	Delegate ID *_ TCM400003 TCM400004	Edit 🥒 Edit 🧨	Add new delegate <u>2</u> * Delete 11 Delete 11	

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
- 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.





For Agent Use Only. Not for Use With the Public.

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

🚺 Trans	samerica"		CONTACT U
	Create Your S	ecure Account	
	Step 1 of 5		
	Last Name*		
	Date of Birth*		
	MM/DD/YYYY		
	Delegate Number*	Green Krisign 🛓	
	Cancel		*Required Fields

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.

An Agent Has Granted You Access							
agenthome@transamerica.com		← Reply	Reply All	→ For	ward	ij	
To © Gupta, Riyanka					Tue 12/5	/2023 2	1:26 PM
On Agent Home							
Hi, RI G							
An agent has named you a delegate and wants to give you access to Agent Home, the one-stop destination for all Transamerica business needs.							
Since you've already created an account, there's no need to go through the process again. Simply log in to Agent Home at secure	trans	america.co	m to see a list	of agent	s that	have	
delegated access to you, then click VIEW AGENT HOME to see more info about each agent.							
Go to Agent Home							
Thanks for all that you do. We're proud to have you with us on this journey.							

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.

For any questions, please contact the national sales desk at 800-322-3796, option 6

