

Passport

Passport is a web-based secure document management tool for storing and sharing insurance policies, endorsements and other documents. The password protected site can be accessed from any computer or smart phone.

Website address: <https://passport.assurexglobal.com/client/fcclogin.aspx>

User name:

Password:

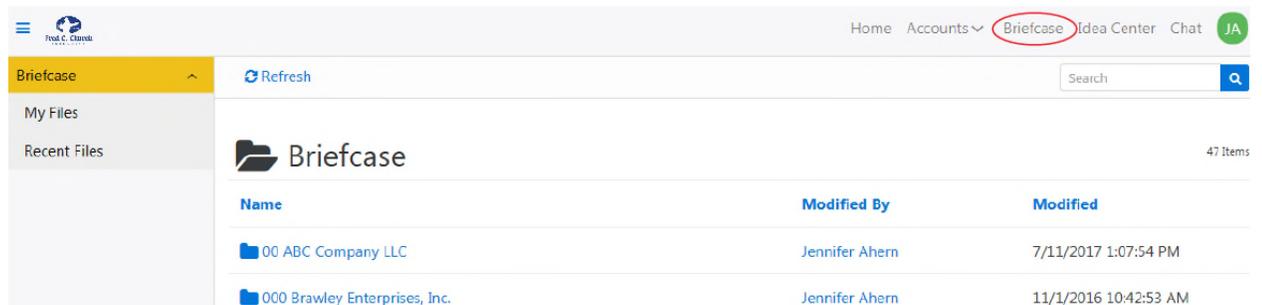
*If you forget your password, you can reset it from the Sign In area:



The image shows the Passport Client login interface. It features the Passport logo (a blue play button icon) and the text "Passport™ Powered by Assurex Global®". Below the logo is the heading "Passport Client". There are two input fields: "Username" and "Password". A blue "Sign In" button is positioned below the password field. A red circle highlights the text "Forgot Your Password?" located below the "Sign In" button. At the bottom of the form is a "Norton Secured" logo with the text "powered by Symantec".

1. Locating posted documents:

- a. Recent Files will be shown on your homepage.
- b. Select Briefcase to see the folders in your account. If you have multiple accounts, you will see all of your accounts.

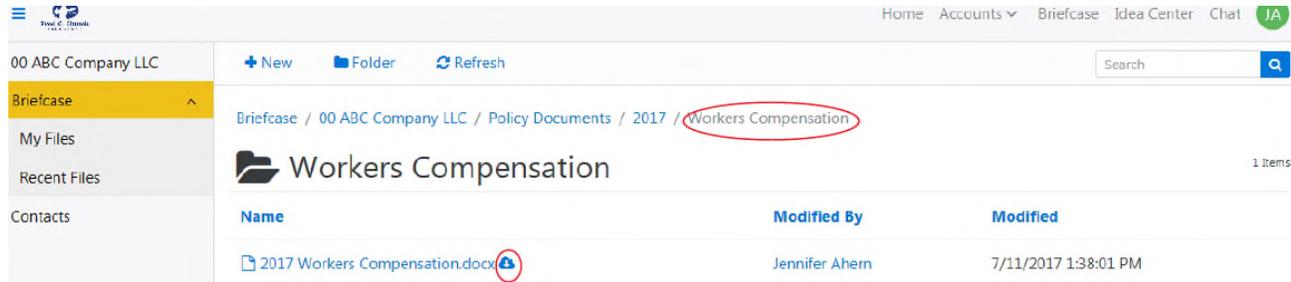


The screenshot shows the Passport Client interface. The top navigation bar includes "Home", "Accounts", "Briefcase" (circled in red), "Idea Center", "Chat", and a user profile icon "JA". The left sidebar shows "Briefcase" (selected), "My Files", and "Recent Files". The main content area displays the "Briefcase" view with a "Refresh" button and a search bar. Below the search bar is a table listing folders:

Name	Modified By	Modified
00 ABC Company LLC	Jennifer Ahern	7/11/2017 1:07:54 PM
000 Brawley Enterprises, Inc.	Jennifer Ahern	11/1/2016 10:42:53 AM

The text "47 Items" is visible in the top right corner of the main content area.

- c. Single click on each folder or subfolder you wish to open. When you locate your document, click on the downward arrow immediately to the right of the title. Save to your computer or print as needed. (If you click on the wrong spot, you can click on the folder name to try again.):



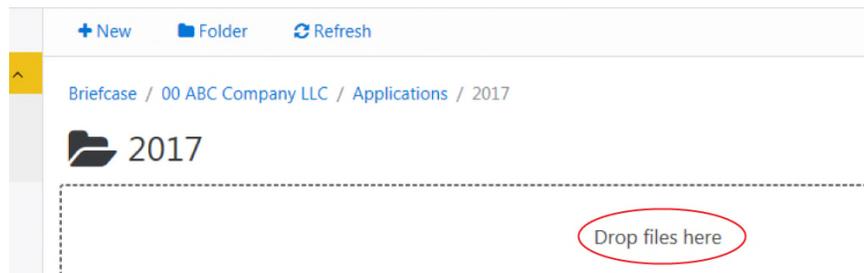
2. Uploading documents:

- a. Select Briefcase to see the folders in your account. If you have multiple accounts, you will see all of your accounts.

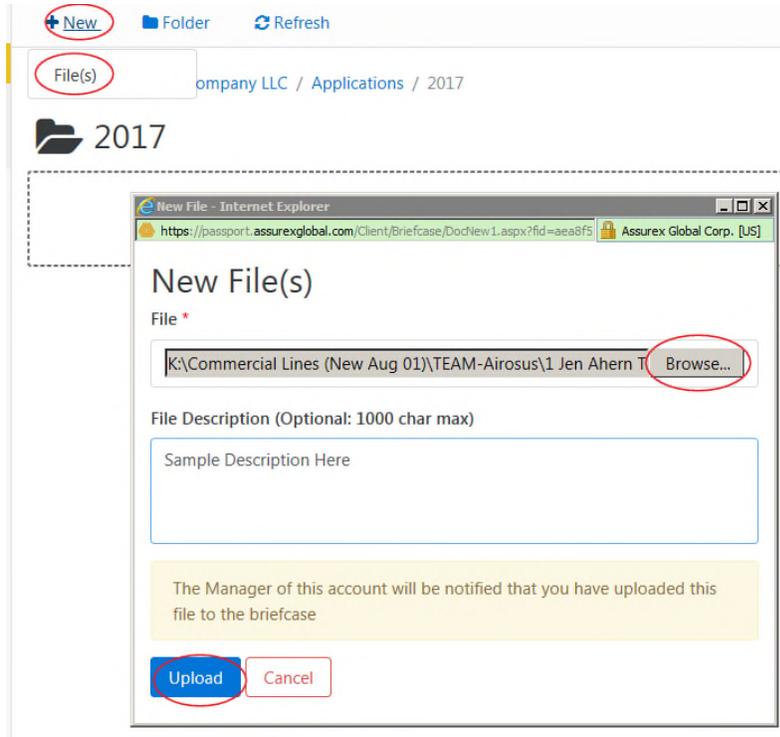


- b. Single click on each folder or subfolder you wish to open. When you open the destination folder, you have two options:

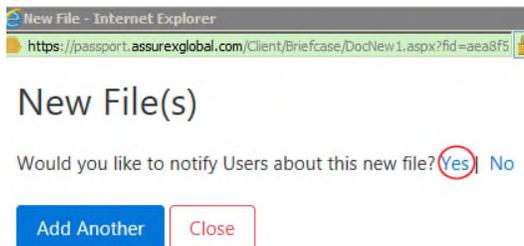
- Drag and drop files. You won't be able to add a note or description using this option, but it is quick:



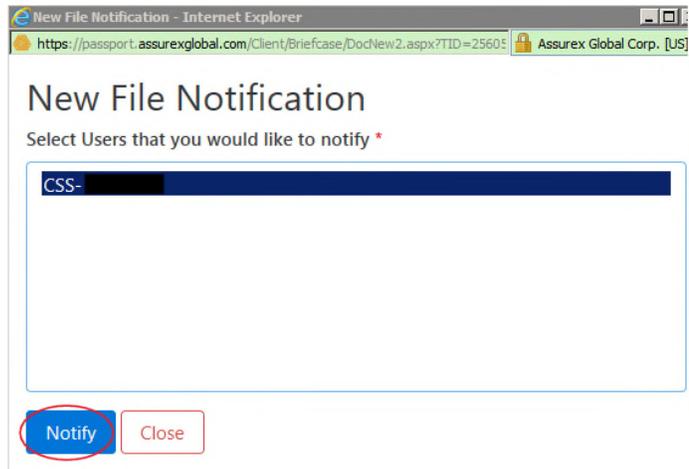
- To browse files, click on +New, then choose File(s). A new window will pop up. Click Browse. Once you attach the file(s), you can include a description or note if desired and click Upload:



- c. In either case, you will be asked if you wish to notify Users about the new file. Single click on Yes. Do not click Add Another or Close:



- d. Choose all names to notify from the list and click Notify. Generally speaking, your Account Manager would be notified of all posted documents. You may opt to notify others if you choose:



3. Logging out: Find your initials on the top right of any page and single click on the bubble. Single click on Sign out:

