

producer website

# HOW TO:

## Create Assistant Profiles



**Step One:** Go to [transamericaemployeebenefits.com](https://transamericaemployeebenefits.com) and click on the producers tab. Log in on the producers website and click on the Manage Assistant Profile link.

**TRANSAMERICA** | [Dashboard](#) | [Sales Tools](#) | [Reporting](#) | [Sales Admin](#) | [Communications](#) | [Group Admin](#) | [Contact Us](#) | [Help](#) | [Log Out](#)

**TEST AGENT2!**  
Your last successful log-in was 02/26/2020 at 4:04 PM

- Your Contacts +
- Alerts! +
- Agent Status +
- News & Information +
- Preferences -

- [Manage Alerts](#)
- [Manage User ID](#)
- [Manage Password](#)
- [Manage Security Question](#)
- [Manage Contact Information](#)
- [Manage Assistant Profiles](#)
- [Contact Us](#)

**Access Transamerica's Online Proposal System**  
Click here to run proposals for your clients 24/7

**Submit New Case or Existing Business into TransTrack**  
[TransTrack](#)

**Express Products**  
[Select a Domicile State](#)

**Quick Links**  
Gain quick access to the tools you use the most.

- Product Information
- Run Proposals
- Production Report
- Commission Statements
- Missing Information
- Re-enrollment Report

**Case Hub**

**Selling Case**  
Getting started & pitching voluntary benefits is easy.  
[Access Tools](#)

**Administration / Billing**  
Provides access to tools and resources to help you succeed.  
[Access Tools](#)

**Reporting**  
We are committed to providing you information to help you grow.  
[Access Tools](#)

**Top Stories**

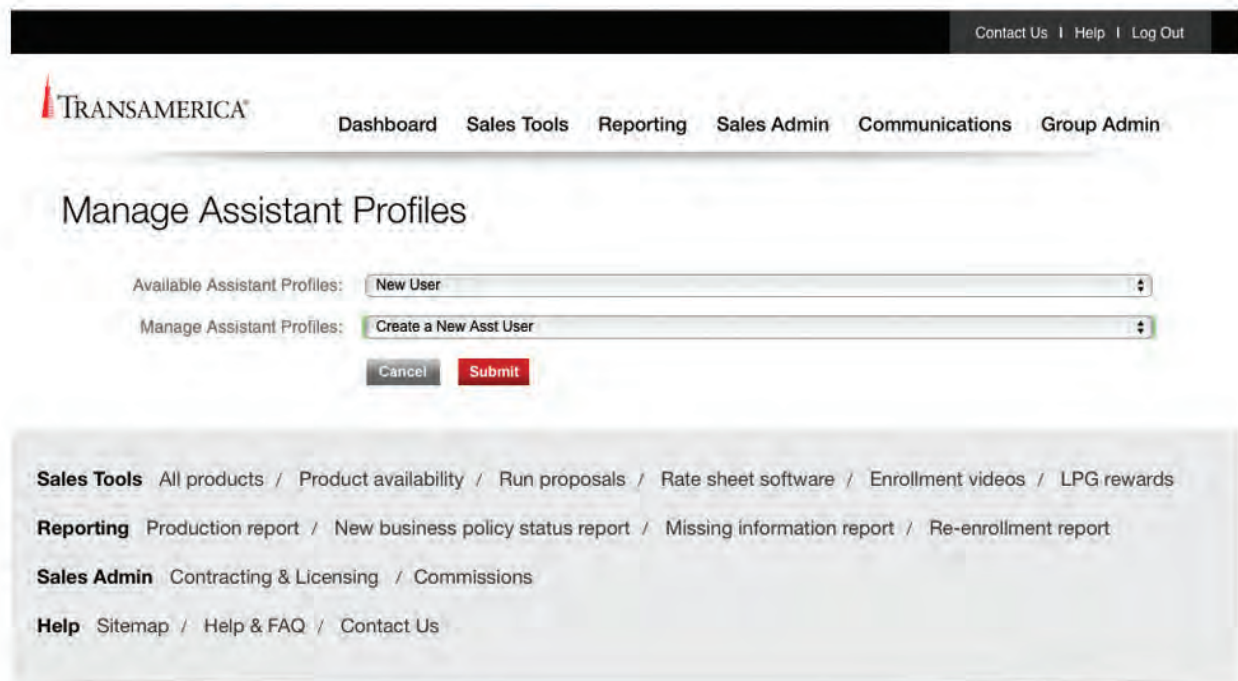
**Sales Tools** All products / Product availability / Run proposals / Rate sheet software / Enrollment videos / LPG rewards

**Reporting** Production report / New business policy status report / Missing information report / Re-enrollment report

**Sales Admin** Contracting & Licensing / Commissions

**Help** Sitemap / Help & FAQ / Contact Us

**Step Two:** On the Manage Assistant Profiles page select Create a New Asst User from the Manage Assistant Profiles pull down:



Available Assistant Profiles:

Manage Assistant Profiles:

**Sales Tools** All products / Product availability / Run proposals / Rate sheet software / Enrollment videos / LPG rewards

**Reporting** Production report / New business policy status report / Missing information report / Re-enrollment report

**Sales Admin** Contracting & Licensing / Commissions

**Help** Sitemap / Help & FAQ / Contact Us

**Step Three:** Choose if you would like the assistant user to view your commission information. Clone the Producer Profile information (keeping you from having to rekey address and phone information) and click submit.

## Create Assistant Profile

Do you want to permit the assistant user to view your commission statement from the web site?  Yes  No

Do you wish to permit the assistant user to receive your Missing Information Report(MIR) email notifications from the web site?  Yes  No

Choose one of the following options to create the assistant user profile:  Define new information?  Clone producer profile information?  Clone assistant user profile information?

**Step Four:** Enter user id, password and security question information.

Create Assistant Profile: Step 1

\*First Name:

\*Last Name:

Business Name:

\*User ID:   
(Enter a valid email address)

\*Password:

\*Confirm Password:

\*Security Question:

\*Security Answer:

\*required

Note: A password must contain at least six characters. One character must be a capital letter, and one character must be a number. Security Answer is case sensitive.

**Step Five:** Review all profile information, click submit and that's it!

First Name: Profile  
Last Name: Test  
Business Name:   
My TWM User Name: PRTEST  
\*Email Address:   
Associated Producer: kathy test

\*Primary Mailing Address

Street Name1:   
Street Name2:   
City:   
State:   
Zip Code:

\*Primary Address Type:  Business  
 Residential  
 No Res