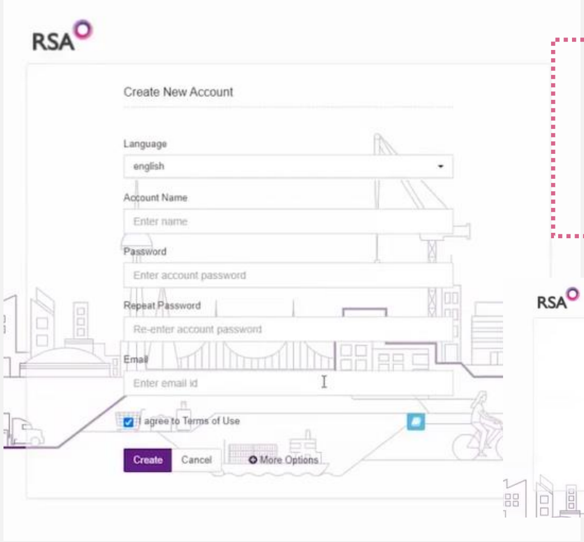
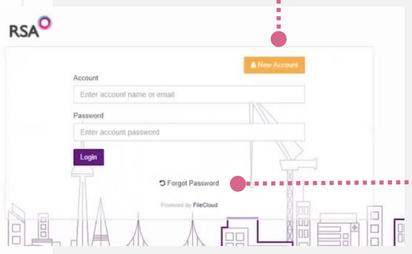
You've Got Mail

How to use your RSA Digital Mailbox





Create New Account

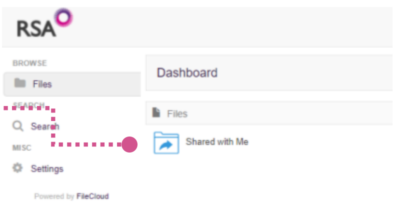
To create an account, click on the 'New Account' button. When you first log in, you will be asked to create a password. When creating an account, your email address will be the critical component that will identify you. You will receive a notice email to verify.

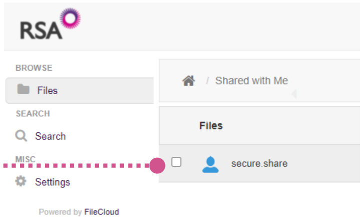
Main Login Screen

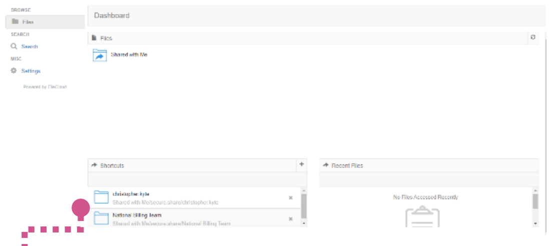
Tip: If you forget your password, your login screen will direct you through the process to reset it.

Dashboard Screen

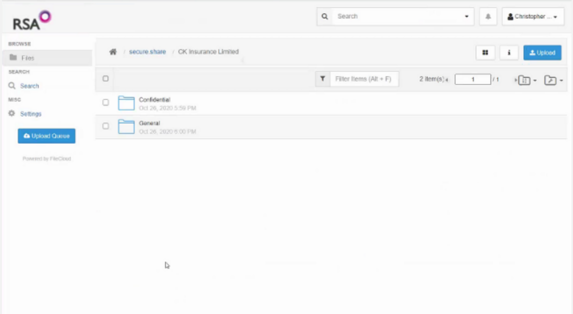
The first screen you will see upon logging in is the 'Dashboard' landing page. Click on the 'Shared with Me' folder, then click on the 'secure share' link







Create a shortcut to a folder on the Dashboard screen by right clicking on the folder and choosing 'add to shortcuts'. Under shortcuts, click on the folder icon to access your digital mail files.



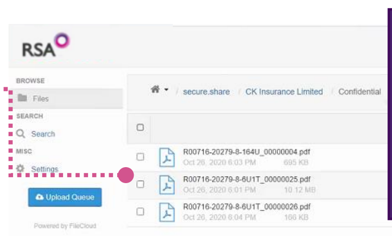
Folders: Confidential & General

You will only see the folders that you have access to – confidential, general, or both.

Please Note: There is only one confidential folder for each mailbox – each brokerage location has their own confidential and general folders. If you have multiple brokerages, each can have their own vault or they can be consolidated if preferred.

In the Mailbox Folder

Once you open the folder, you will see all scanned mail items in PDF file format listed. You can view the file and rename it based on your internal sorting preferences (i.e. Date Received, Owner, Policy Number, etc.)



Tip: Policy Documents can be sorted by Personal or Commercial via an identifier of PER and COM

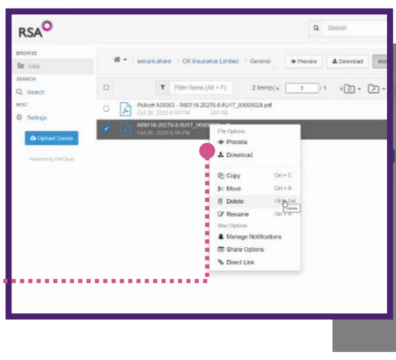
Tip: This operates similar to how a physical mailroom is operated today. You need to open the mail document to be able to identify what it is (Policy Document, General Mail, etc.).

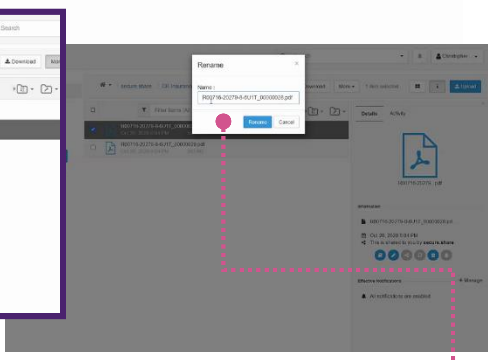
Tip: You can create additional folders by clicking on the folder icon in the top right of any folder task bar.

The files in this folder will remain here for 12 months.

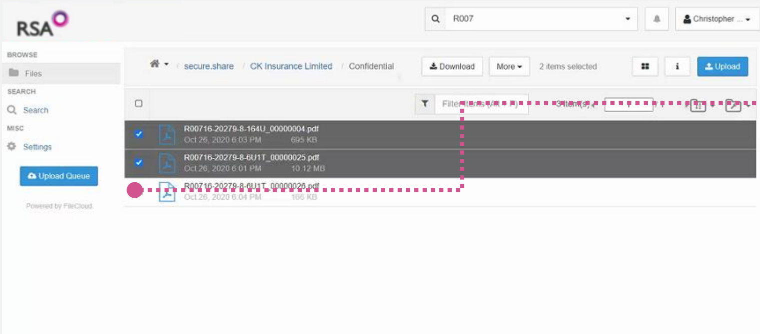
Tip: If you delete a file from a department folder, you will delete it for all users who have access.

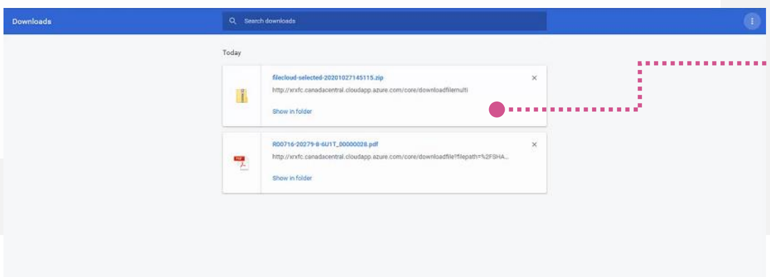
Tip: You can preview & download the file by right-clicking on the specific mail item and selecting 'preview' or 'download'. You can also print directly from the preview screen of the document.





Tip: To rename the file, right-click on the specific mail item and select 'rename'. A dialogue box will pop up where you can enter in the new file name.





Downloading Documents

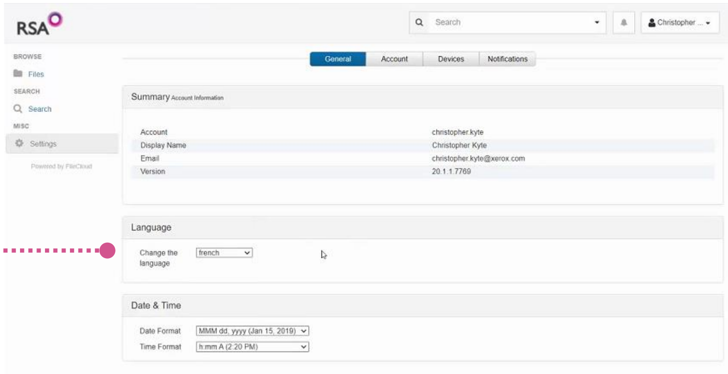
After viewing the files, select the items you would like to download by clicking on the button beside the desired file(s).

Tip: All downloads are downloaded and saved into your 'Downloads' folder or wherever your system defaults.

If you select more than one file to download at one time, they will be downloaded as a single zip file.

Tip: Download all files intended for a specific recipient at once. This creates a single zip file that can be conveniently shared with the recipient.

Please Note: Once the download is complete, if sorting is required, you must sort it manually. It does not automatically sort into an agency manager system.



Changing Language Settings

You can change your language settings in the General settings menu

For more information on how to access and download your digital mail, please reference our Frequently Asked Questions document.