

Agent Portal Bonds Quick Card

QUICK CARD KEY

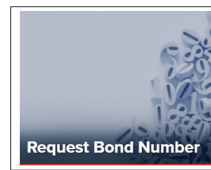
Agent Portal Bonds Functionality

- Request a Bond Number
- Bond Report Sheet
- Accessing Bonds Form Library

Request a Bond Number

The user can request a Bond Number without going into the Bond Report Sheet. By filling in 5 key data elements and clicking a button, a bond number will be assigned.

1. On your Homepage, click the Request Bond Number tile.
2. Complete the fields on the screen.
Note: All fields are required.
3. Click the Request a Bond Number Button.
Note: This button will be enabled when all required fields are completed.
4. The Bond Number will display in the Bond Number field to be noted by the user. The request will be stored in the Bond Form Library.
5. If you have more Bond Numbers to request, click the Request Another Bond Number button.
6. If you are finished, click the Exit button.

A form titled "REQUEST A BOND NUMBER". It contains several input fields: "PRODUCER CODE & NAME" (dropdown menu showing "189014 - Varney Agency Inc."), "BOND SYMBOL" (dropdown menu showing "CA"), "OBLIGEE'S NAME" (text input showing "Test Obligor"), "PRINCIPAL'S NAME" (text input showing "Test Principal"), "TYPE OF BOND" (dropdown menu showing "Contract Surety Bond"), and "BOND AMOUNT" (text input showing "50000"). Below these fields is a "BOND NUMBER" field showing "CA 3927474". At the bottom are three buttons: "Request a Bond Number", "Request Another Bond Number", and "Exit".

Bond Report Sheet

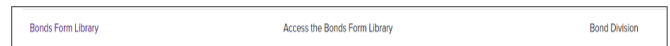
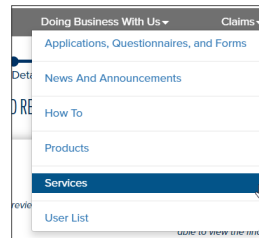
1. The user can complete the Bond Report Sheet and send it to the appropriate Divisional Office.
2. On your Homepage, click the Bond Report Sheet tile.
3. Complete the fields on the screen. Note: Required fields are denoted with an Asterisk
4. Click the Save & Continue button. Note: This button will be enabled when all required fields are completed.
5. Complete fields on Principal/ Obligor field and click the Save & Continue button
6. Complete fields on the Additional Info field and click Save & Continue.
7. Preview Report Sheet PDF— The user can preview the PDF to ensure that all data was entered correctly. Note: This copy of the PDF will not include the Bond Number as it has not been generated yet.
8. If you need to make updates to previously entered data, you can either use the Back button or click the links at the top of the page to navigate to a specific page.
9. On the Preview/ Submit page, click the Submit Bond Report Sheet button.
10. The assigned Bond Number will display in the Bond Number field and an email will be sent to the Divisional Office.
11. To view the PDF after it has been submitted, click the View Final Report Sheet PDF button. Note: This copy of the PDF will include the Bond Number.
12. If you have more Bond Report Sheets to submit, click the Submit Another Report Sheet button.
13. If you are finished, click the Exit button.

A form titled "SUBMIT A BOND REPORT SHEET". It has a progress bar at the top with steps: General Info / Producer, Principal / Obligor, Bond Details, Additional Info, and Preview / Submit. The form is divided into sections: "GENERAL INFO" (Status: New, Renewal, or Certificate; Method of Renewal: New Bond or Continuation; Working Department: Great American Ins. Co. or Great American Alliance Ins. Co.), "PRODUCER" (Producer Code & Name: 189014 - Varney Agency Inc., Divisional Office: Cincinnati/Blue Ash), and "ADDITIONAL INFO" (Street: 322 Oak St, City: Bangor, State: ME, ZIP: 04401-6515). At the bottom are "Save & Continue" and "Exit" buttons.A form titled "SUBMIT A BOND REPORT SHEET" showing a preview and submission interface. It has a progress bar at the top with steps: Back, General Info / Producer, Principal / Obligor, Bond Details, Additional Info, and Preview / Submit. The form is divided into three main sections: "PREVIEW" (You may generate a preview of the completed PDF at this time. PLEASE NOTE that the Bond Symbol and Bond Number will NOT be generated or assigned until the report sheet has been submitted. Preview Report Sheet PDF), "SUBMIT" (It is not required to generate a preview of the report sheet before submitting. Submit Bond Report Sheet), and "CONFIRMATION" (Upon successful submission, the Bond Symbol and Bond Number will be displayed below. You will also be able to view the final report sheet PDF at this time. BOND NUMBER: CA 3927475. View Final Report Sheet PDF). At the bottom are "Submit Another Report Sheet" and "Exit" buttons.

Accessing Bonds Form Library

The user can access the Bonds Form Library from within Agent Portal.

1. On your Homepage Navigation Bar, click on Doing Business With Us and then Services.
2. Click on the Bonds Form Library link.
3. Enter Bonds Form Library User ID and Password.
4. Users will be taken to Bonds Form Library where Bond Forms can be accessed. Note: Bond Report Sheet functionality will no longer appear within the Bond Form Library. All Bond Report Sheet submissions will be done through Agent Portal.



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