

AGENCY AUTOMATIONTEAM, INC.



Together your Employees will Achieve More Because

We're Giving You Back YOUR Time!

PO Box 397
Post Falls, ID 83877

Local: (208) 242-4321
Fax: (509) 368-7325
Email: info@agencyateam.com

1-Week Test Drive Agreement, Terms & Conditions

This agreement is between Agency AutomationTEAM, Inc of Post Falls, ID referred as AAT and the agency listed below under "Agency Information" from here forward referred to as "agency".

Condition And Terms For Test Drive

To take CP Manager on a Test Drive and have login access to it agency and your staff agree to the following items:

- Agency will not provide the user name and password to anyone outside of the agency. Everyone in the agency will share the same user login.
 - You should know that we capture IP addresses of people who login. Anyone logging in using a browser or software program that changes their IP address in order to hide their location and/or identity is in direct violation of this agreement.
- Agency will not record or take screen type shots of any parts of CP Manager. CP Manager is the first productivity driven agency management system to ever be designed, and the development of CP Manager was at a great cost. Sharing design elements, layouts, functionality, and/or exclusive features with competitors or others who would pass the information to competitors would be at a great loss to AAT so agency agrees to keep what they learn about CP Manager to themselves and use this information solely for the purpose of helping them to determine if switching to CP Manager is a good move for the agency.
- Agency will schedule a 90-Minute Walk-Through. The Walk-Through is an important part of the Test Drive program because it teaches you key features and design layouts to help you maximize your Test Drive time.
 - We will use GoToMeeting (GTM) for the Walk-Through. You will need to download the GTM client in order to share your screen. This is required so we can properly navigate you through CP Manager during the Walk-Through. If it's not installed initially it can be installed at the time of the walk-through when we make you the Presenter.
- We limit what types of files you can upload to CP Manager via our attachment feature to protect our server from virus.
- Agency agrees to be courteous and thoughtful of clients, policies and other data added to CP Manager which are not records agency personally added into CP Manager. Agency understands other agencies are also testing CP Manager and will also be adding records to the system and agree not to make changes to records that aren't theirs.
 - Every agency will have their very own specific login and Staff ID. Most windows will show you the User, Date & Time that record was added. Please observe the Staff ID and make sure it's a record you added. It will look like this:

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- If this clause is not respected we reserve the right to update your security to only access your own clients or remove you from the Test Drive program.
- Agencies test driving CP Manager will share the setup and carrier records. AAT will do a basic setup of the Demo agency and will add 3 carriers to CP Manager... 1 PL we'll call Personal Lines Carrier, 1 CL we'll call Commercial Lines Carrier and 1 MGA we'll call MGA Company. Agency agrees not to edit or delete any of these carriers or setup items we add. You can add reasonable information to them if needed. Or you can add your own Carriers to test if you like.
- Agency agrees NOT to kick out any other users than themselves. From the My Activities page there's a button "Kick Off" where you can kick users out of CP Manager. This is used when a user has logged in more than once taking up another users license in your agency.
- We have put in place security which stops you from accessing any other staff records other than your own. We want agencies to enter in an email address so they can test the very powerful emailing features in CP Manager while also protecting their email information from others.
 - Email passwords are hidden so even if someone was able to access your staff record they could not steal your email address.
- Agency agrees to setup a new "clean" email address for testing purposes of the emailing features in CP Manager. This could be a Gmail account or new test email account under your domain to use in CP Manager for testing purposes. This is to insure you don't receive any emails with a virus that would pull into CP Manager.
 - We are not going to be going through a complete "implementation" process with agencies test driving CP Manager like we do with new clients. When you actually purchase CP Manager we'll show you how to properly add your existing email accounts to CP Manager so you don't pull in thousands of emails that may be sitting in your inbox. For Test Drive purposes in a system other agencies will have access to you likely do not want all of your emails pulled into CP Manager anyway, thus, why we also recommend a new "clean" email address.
- The agency agrees not to send or receive emails with suspicious attachments which could be a virus. Plus...
 - Agency agrees NOT to open up any email attachments from emails they didn't send themselves for testing purposes.
 - If an agency opens an attachment with a virus which would infect our server the agency would be financially responsible for disinfecting the server and any harm created from the virus.
 - We recommend the combination of Bitdefender Virus Protection which will quarantine email attachments with a virus and Malwarebytes for malware on all of your computers. This is not required for the Test Drive. This is just a recommendation so you know what we recommend. Using a "clean" email address should eliminate the possibility of receiving a virus.
- We suggest you don't add any real data or personal data to CP Manager because others testing CP Manager will be able to see the information you add. This is because you're being given a user login for a global agency many will have access to.
- If during the Test Drive you find things you can't do or have problems doing something make a list of these things with as much detail to the issue as possible including the URL of the window you're on and email it to your account manager. They will call you (or email you the answers) at their earliest convenience. If your questions require a demo to show you how to do it or a phone call is required to collect more information to understand what you need they will email you to

schedule a short GTM session to show you or phone call to discuss the issue with you. Please be respectful of your account managers time and be aware they are working with a lot of agencies.

- We do not involve Support to help Test Drive agencies with questions *unless* Support has the time to get involved. The main purpose of Support is to support and serve paying clients of CP Manager.
- There are no refunds on the amount charged for the Test Drive.

Agencies signature below signifies their agreement to all terms and conditions of this agreement.

By: _____
Signature Title

Print Name

Agency Name Date

Questions And Information Required

Agency Information:

Agency Name: _____

Address 1: _____

Address 2: _____

City, State Zip: _____

Phone: _____ **Fax:** _____

Agency Owner: _____

Owner's Email: _____

Main Walk-Through Contact: _____ (Main person doing WT)

Phone # & Ext: _____

Email Address: _____

Current System, Hardware & Software

Current Agency Management System: _____

Of Users: _____

of Agencies/Locations: _____

Current Environment: Hosted Online | Network

Preferred Environment: Hosted Online | Network

Do your computers have Windows 7 or greater? All Do | Most Do | Some Do | None Do
How much RAM do your computers have? _____ (Between) | Don't know
What browser is your staff using? _____ (We strongly recommend Chrome)
What Virus Protection Software are you using on the Computers which will access CP Manager: _____

When considering a new agency management system, what are the 5 key things the new system needs to offer before you'll consider switching to it?

1. _____ Must | Want
2. _____ Must | Want
3. _____ Must | Want
4. _____ Must | Want
5. _____ Must | Want

Test Drive Request

Monday To Start. Month: _____ **Monday of Month:** 1st | 2nd | 3rd | 4th | 5th (if one)

Provide a Fictitious Name For Your Staff Record: _____

A Real Email Address You Receive Emails From: _____

(Required to setup your staff record. You'll receive an email once your staff record is added to update the password, but you won't be able to do this until the Test Drive starts so you will likely have to hold onto the email for a few days.)

How Many People Will Be Logging In? _____ (By default we allow 100 total users for the Demo agency. This helps us to know if we need to increase the amount.)

Schedule 90-Minute Walk-Through

Walk-Throughs are scheduled first come first served. Walk-Throughs start at (all based upon PST) **9 am, 11 am, 1 pm, 3 pm**. Please provide 3 options:

1st Option. Day of Week: Mon | Tues | Wed | Thur | Fri; Time: _____ PST | MT | CT| EST

2nd Option. Day of Week: Mon | Tues | Wed | Thur | Fri; Time: _____ PST | MT | CT| EST

3rd Option. Day of Week: Mon | Tues | Wed | Thur | Fri; Time: _____ PST | MT | CT| EST

If there are specific things you want to see it is always helpful if you make a list of these things and email them to sales@agencyateam.com and we'll get the list to your account manager. Anything you add in the 5 Must/Want list above we'll be sure to show you.