AGENCY AutomationTEAM, Inc.

Together your **E**mployees will **A**chieve **M**ore Because

We're Giving You Back <u>YOUR</u> Time!

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30-Day 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".

The 30-Day Test Drive is where we create your very own agency for you to test drive and the only users that will be part of this agency are the users you add. It's exclusively for your agency to use.

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.

   o 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.

   o 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.

- We do not add any carriers to your 30-Day Test Drive agency. You will need to add them including Issuing Companies and Plan Codes, all of which are required before adding a policy. You will have access to the Setup Manual which will show you how to add these items.

- 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.

- o 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.

- o For your information, email passwords are hidden so even if someone was able to access your staff record they could not steal your email address.

- The agency agrees not to send or receive emails with suspicious attachments which could be a virus. Plus…

  - o Agency agrees NOT to open up any email attachments from emails they didn't send themselves for testing purposes.

  - o 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.

  - o 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.

- 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.

  - o 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 in the 1st week of your 30-Day Test Drive. They 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.