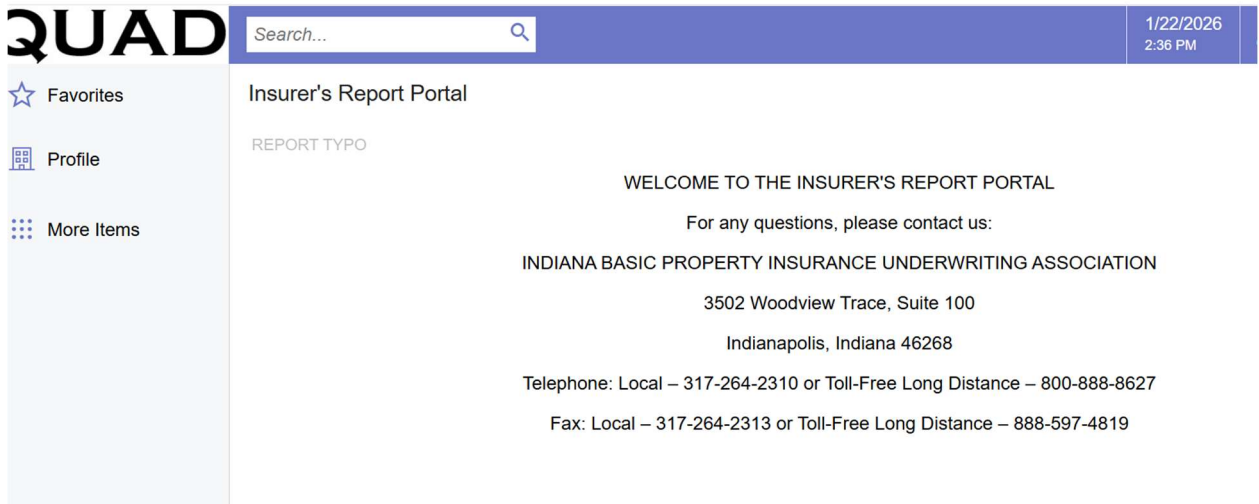
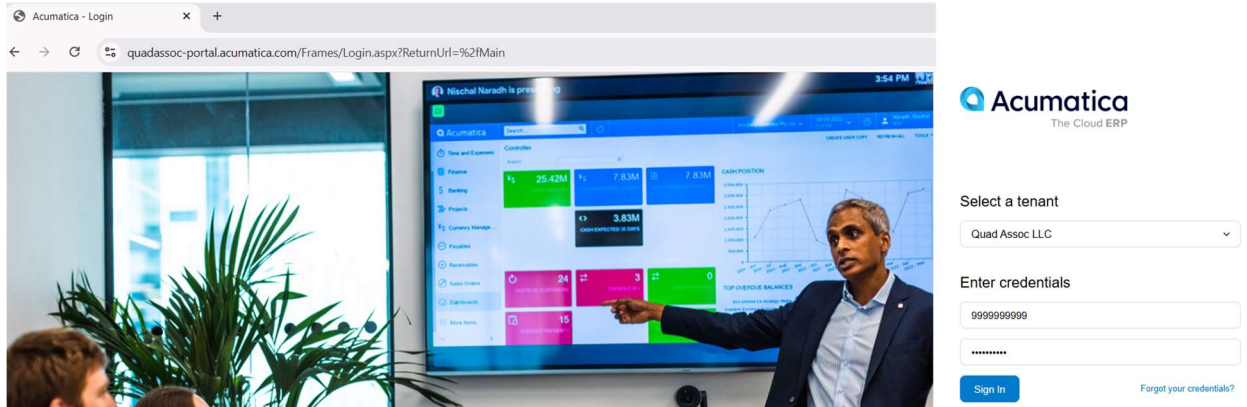


Acumatica Portal Guide

The Portal can be accessed at <https://quadassoc-portal.acumatica.com/>

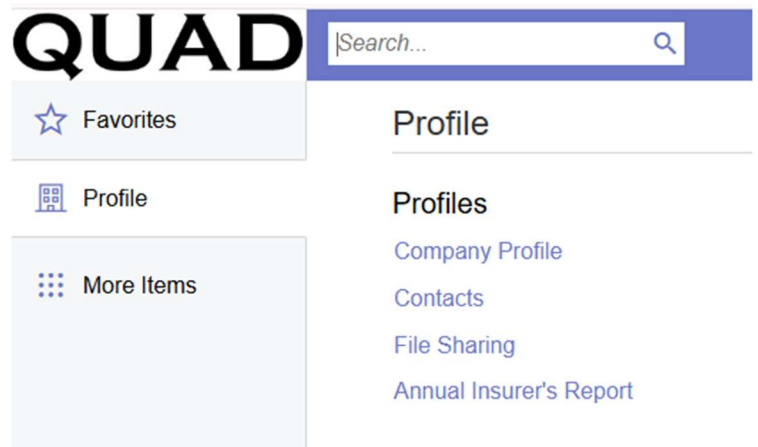
Login: <Insert NAIC #>

Password: portal123!



A. Portal Features

1. Company Profile – informational only
2. Contacts – informational only
3. File Sharing – this space allows portal users to upload files that can then be retrieved by internal ERP users. (Files



can also be uploaded internally for viewing and downloading by portal users.)

4. Upload State Page 14 – Go to Profile / File Sharing select the File button in the upper right-hand corner and then you can upload the State page

The screenshot shows the top navigation bar of the QUAD portal. On the left is the 'QUAD' logo. To its right is a search bar with the placeholder text 'Search...'. Below the search bar is a vertical sidebar menu with the following items: 'Favorites' (with a star icon), 'Profile' (with a grid icon), and 'More Items' (with a grid icon). To the right of the sidebar, the main navigation area is titled 'Profile' and contains a list of links: 'Company Profile', 'Contacts', 'File Sharing' (which is highlighted with a blue background), and 'Annual Insurer's Report'.

The screenshot shows the 'File Sharing' interface. At the top left, the text 'File Sharing' is displayed. On the top right, there are three tabs: 'NOTES', 'FILES' (which is highlighted with a yellow circle), and 'TOOLS' with a dropdown arrow. Below the tabs are two icons: a folder icon and a refresh icon. A light blue banner displays 'Business Account: 15350 - West Bend Insuranc'. Below the banner are several action icons: a refresh icon, a trash icon, the text 'DELETE SELECTED', a split-screen icon, and a close icon. At the bottom, there is a table with the following columns: 'From Portal' (with a checkbox), 'Name', 'Creation Date', 'Last Version Date', 'Comment', and 'Size (kb)'. The table is currently empty.