AGENCY ADMINISTRATORS Resource Center Admin Reference Guide

Introduction

The Agency Administrators Resource Center is a web application containing Information, Links and Tools designed to be utilized in conjunction with workday tasks here at Agency Administrators. The application consists of a header bar and several Pods with specific information and functionality. Click on the underlined links below for more detail:

- The Header Bar
    - The Header Bar Consists of the Agency Admins Logo and a list of Agency links assigned to your Agency Administrator Team.
- The Pods
    - User Information Pod
        - The User Information Pod is a container consisting of information relevant to you and other user's in the office, including the following:
            - Availability
            - Team Name
            - Security Level
            - Contact Information
            - Producer Code Credentials
    - Agency Administrators Pod
        - The Agency Information Pod is a container consisting of information and functionality relevant to Agency Administrators, including the following:
            - Messaging
            - Events
            - News/Announcements
            - Contact Information
            - Office Closures
            - Business Hours
            - Resource Center Reference Guide

- Team Information Pod
  - The Team Information Pod is a container consisting of team information divided into the following Sections:
    - Team Managers
    - Team Branches
    - Team Members
    - Team Agencies

- Agency Information Pod
  - The Agency Information Pod is a container consisting of information relevant to the selected Agency, including the following:
    - Agency Information Document
    - Mailing & Contact Info
    - License Number
    - Notes
    - Contacts & Information
    - Associated Carriers, their Producer Codes & Credentials
    - Office Closures
    - Business Hours

- Carrier Information Pod
  - The Carrier Information Pod is a container consisting of information relevant to the selected Carrier, including the following:
    - Mailing & Contact Info
    - Notes
    - Contacts & Information
    - Business Hours

- AARC Documents Pod
  - The AARC Documents Pod is a filter-able container consisting of PDF Document links divided into the following Sections:
    - Acord Forms
    - Billing
    - Quote Sheets
    - Supplemental Forms
    - Underwriting Guidelines
    - Miscellaneous

- AARC Links Pod
    - The AARC Documents Pod is a filter-able container consisting of system links divided into the following Sections:
        - Phone
        - Email
        - Web
        - Property Cards

- Underwriting Guidelines Pod
    - The Underwriting Guidelines Pod is a tool to compare up to 3 subjects for all Carriers. The results can be filtered to search all results for a text pattern among the carriers and their guidelines.

The Header Bar

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The header bar is a static toolbar that is permanently located at the top of the Resource Center. It consists of the Agency Administrators logo, links to Agencies and scroll buttons to traverse through the list of Agency Links.

- **A**: Agency Administrators logo. When clicking the logo, the Administrator/Exec tool icon's visibility in all pods are toggled. You can hide the Administrator/Exec tool icons to create a less cluttered environment. In general, the Administrator/Exec tool icons appear as orange (selections), green (additions/updates) or red (deletions). They will change to hot pink when you mouse over any Administrator/Exec tool icons.

- **B**: Hide/Show Pods.

- **C**: Scroll Agency Links to the left.

- **D**: Agency Links. A listing of all Agencies associated with your Agency Administrator's Team. Click on these links to load the Agency Pod with the selected Agency's information.

- **E**: Scroll Agency Links to the right.

The Pods

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The Pods are a series of windows containing specific information and tools within the Resource Center. These Pods can be dragged, by the Pod Header Bar (**A**) or Pod Name (**C**) to any position on the screen, even off screen to the right, if you desire to get it out of sight. They can also be collapsed and expanded by clicking the Expand and Collapse Tool (**B**) on the left-hand side of the Pod Header Bar. The background colors of the Pods can be changed by using the Pod Color Tool (**D**) on the right-hand side of the Pod Header Bar. The Pods are broken into sections which can be Expanded and Collapsed by clicking on the Pod Section Header Bars (**E**). The width of these Pods can be narrowed and widened by placing the mouse on the left- or right-hand edge of the Pod body until the 'resize' cursor (⟷) appears and then hold the mouse down and then narrow/widen the Pod's width to the desired dimension. The Pods location, color and width will be saved whenever a change to its appearance is made and will appear in the same location when you start the Resource Center.

- **A**: Pod Header Bar. The Pod Header Bar contains the Pod Title and tools to control the Pod's appearance. The Pod can be positioned anywhere on the screen by clicking and dragging the Pod by the Pod Header Bar (**A**) or Pod Name (**C**) to the desired location. Avoid trying to drag the Pod by the tools on the bar (**B** & **D**), as they will activate the tool and ignore the drag process.

- **B**: Expand and Collapse Tool. The Pod can be collapsed and expanded by clicking on this tool.

- **C**: Pod Title.

- **D**: Pod Color Tool. The background color of the Pod can be changed to whatever color you desire. Click on this tool and the following Color Picker appears:

  Simply choose the primary color range from the full spectrum on the right, then click anywhere in the large box to select the exact color you prefer. Then click 'Choose' to apply the background color to the Pod.

- **E**: Pod Section Headers. The Pod Section Header is used to separate the Pods into logical sections. These sections can be collapsed or expanded, to preserve screen space, by clicking on the Pod Section Header Bars (**E**).

The User Information Pod

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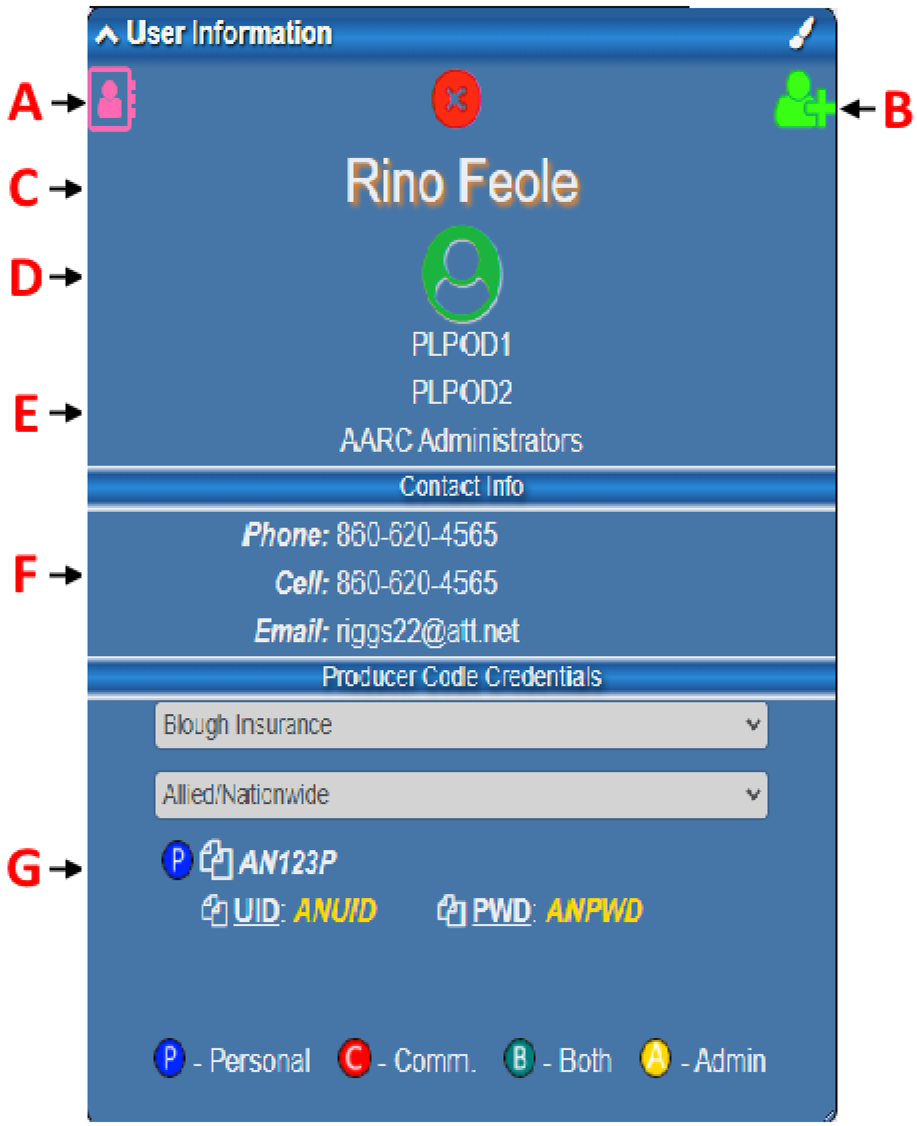
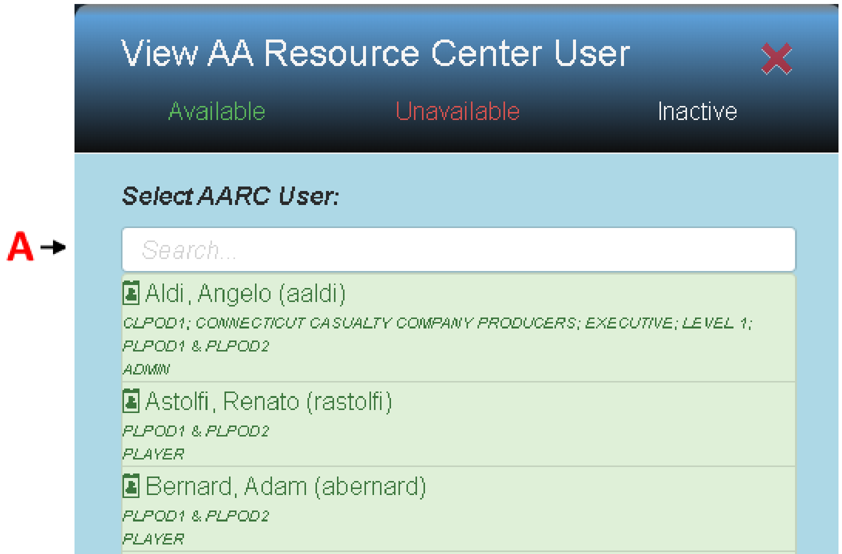
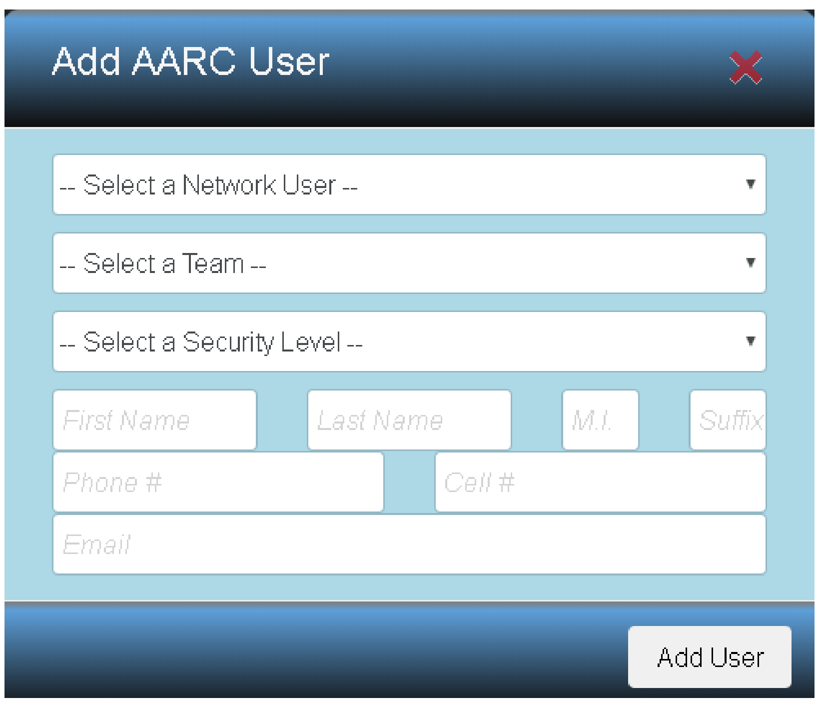


The User Information Pod contains all information pertaining to you and other Resource Center Users. By default, the username of the person logged into Windows is the account that the application runs under. The Pod consists of the following segments:

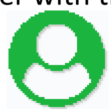
➢ **A**: <u>Agency Administrators Username Catalog icon</u>. When clicked, a list of Resource Center Users is presented. Click on any of the users to view all their information shown in the Pod image above, including Producer Code credentials for the selected user. The list of users can be filtered by entering any part of the user's name in the Search Box (**A**)



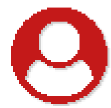
- **B**: Add Agency Administrators Resource Center User icon. When clicked, a dialog will appear prompting for Username information.
  - Choose a user from a list of Agency Administrator's network users who aren't already users in the Resource Center.
  - Assign the user to an Agency Administrator Team. The list of Teams is managed in the Team Information Pod, only accessible to users assigned an EXEC security level.
  - Assign the user a Security Level. The following Security Level options exist:
    - Executive
    - Administrators
    - Team Managers
    - End Users
  - Fill in the remaining personal information:
    - Name Information
    - Office & Cell Phone Number
    - Agency Administrators Email Address
  - Click the 'Add User' button to Add the User.



- **C**: User’s Name. The User’s name is located at the top of the Pod. When the name is clicked, a dialog like the previous image is presented to modify the user’s information and settings.
- **D**: Status Indicator. The Status Indicator changes color based on the selected User’s availability. It will be generally duplicated by the User’s status in the Mitel Contact Client Center with the following statuses:



Available



Not Available

- **E**: Teams & Security Level. The listing of the User’s Teams followed by their Security Level appear below the Status Indicator.

- **F**: Contact Information Section. This section displays the User’s work phone number, cell phone number and E-mail address. The section can be collapsed by clicking on the Contact Information header bar.

- **G**: Producer Code Credentials. The selected User’s Producer Credentials will appear here.
  - Choose the Agency and Carrier to display the associated Producer Code, User ID and Password.
  - Upon choosing the Agency and Carrier, their respective Pods will be populated by the chosen Agency and Carrier.
  - The Producer Code, Username & Password can be copied to the clipboard by clicking on the “Copy” icon next to each.
    
  - The section can be collapsed by clicking on the Contact Information header bar.

Agency Administrators Pod

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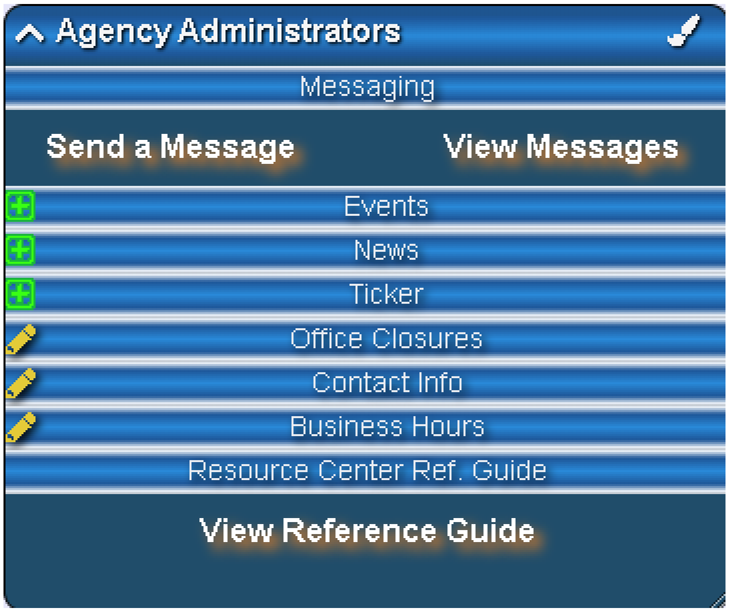
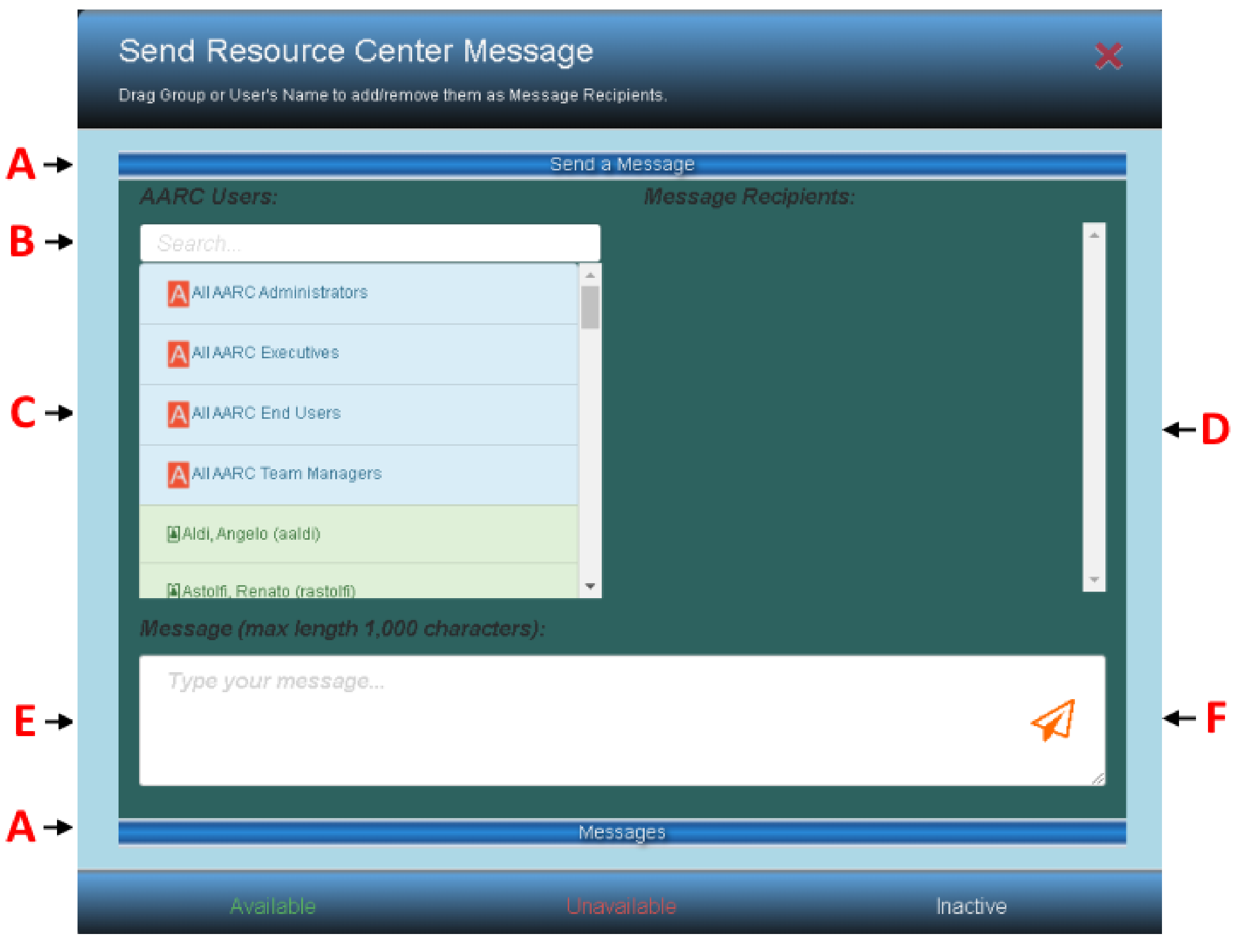


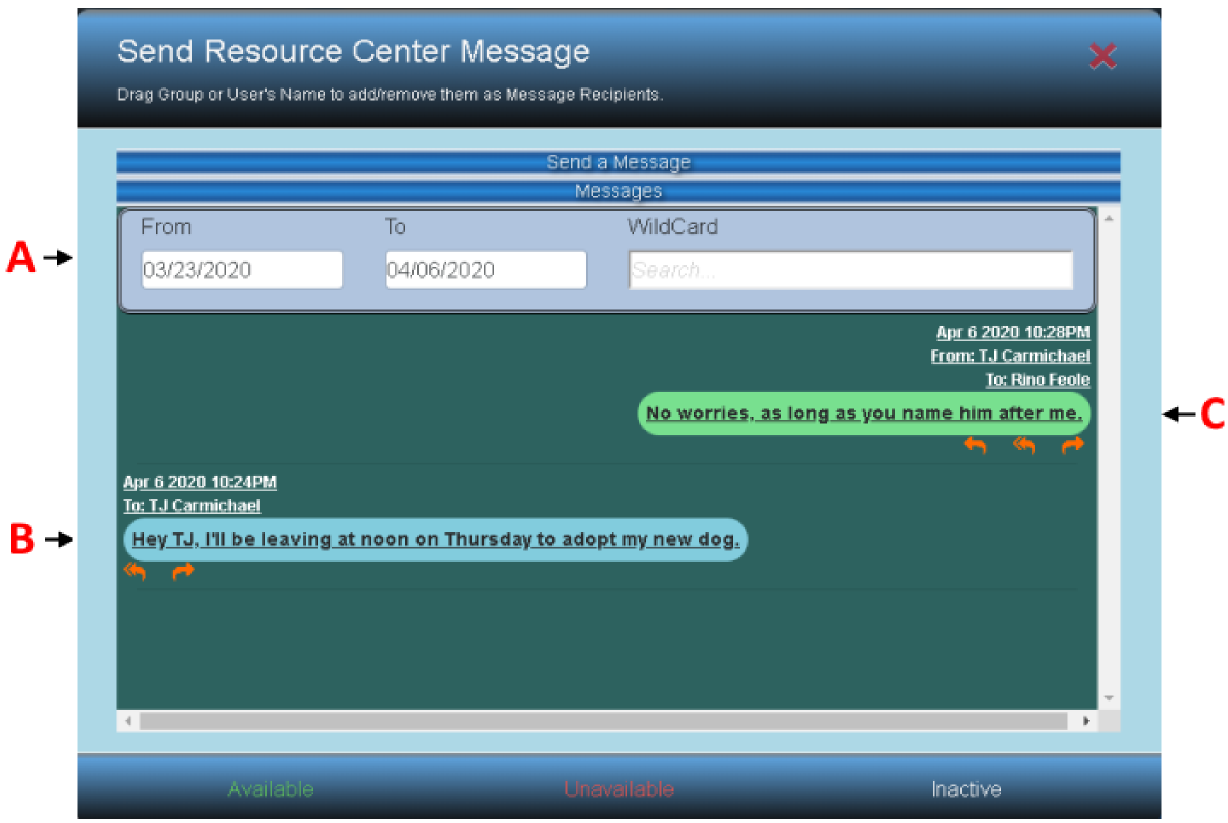
The Agency Administrators Pod contains information and functionality strictly related to Agency Administrators. The following is a listing of the sections and their purpose:

- Messaging. Here the user can choose to send, or view messages sent within the Resource Center application. The sending and the viewing of messages are contained within the same dialog window. Depending on which option you choose, the selected section is expanded, and the other section is collapsed. Their display can be toggled by clicking on the either the section headers (**A** in image below).

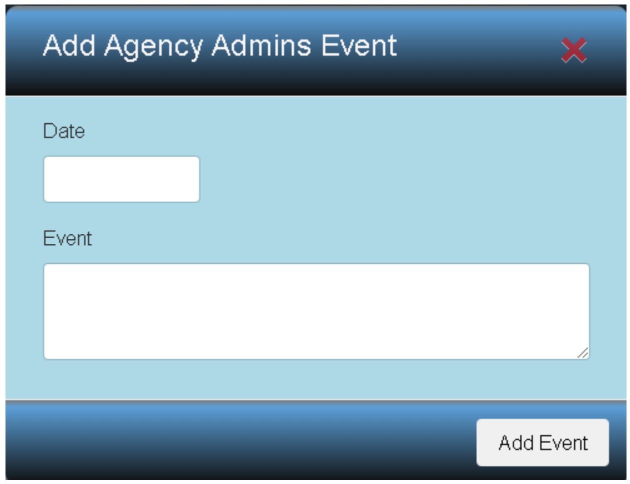
- Send a Message.
  - Choose your message recipients by dragging them from the list of Agency Administrator Resource Center (AARC) Users (**C**) on the left and dropping them to the list of Message Recipients (**D**) on the right. If you drag and drop any of the 'group' items (signified by A), the user's represented by that group will be added to the Message Recipient (**D**) list.
  - Message Recipients can be removed, by dragging and dropping them back to the AARC Users (**C**) list on the left.
  - The AARC Users (**C**) list can be filtered by typing any part of the User's name in the filter text box (**B**)
  - Type your message, up to 1000 characters in length, in the text area (**E**). The character count and remaining characters indicator, above the text area, will update as you type your message.
  - When the message is ready to be sent, click the paper airplane icon (**F**), to send the message.



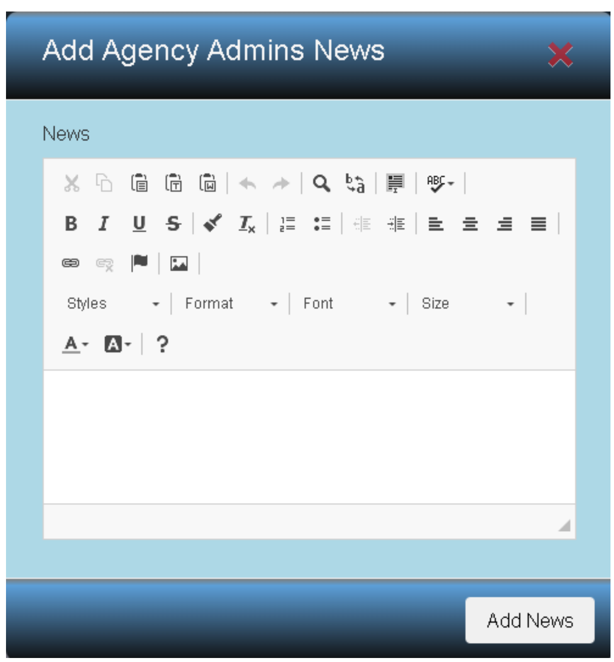
- View Messages.
  - By default, the last two weeks messages are displayed. All your messages are saved and can be retrieved by altering the messages filter (**A**). The filter consists of a date range the message was sent/received and a wildcard filter, which will filter on the sender, all recipients and the message body.
  - All your sent messages will appear on the left side of the messages window, in blue bubble. It will list:
    - The time message was sent
    - All recipients
    - The message
    - Icons to Reply to All () and Forward ().
  - All your received messages will appear on the right side of the messages window, in green bubble. It will list:
    - The time message was received
    - The Sender
    - All recipients
    - The message
    - Icons to Reply (), Reply to All () and Forward ().



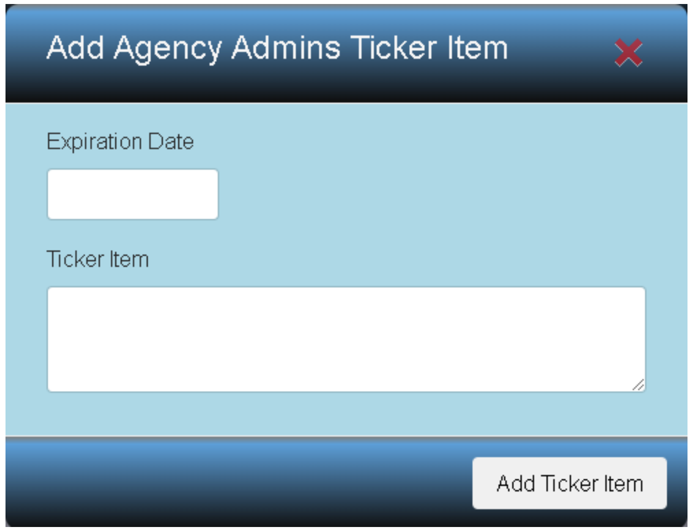
- Office Events. Agency Administrators' office events will appear here. Office Events can be added by clicking on the green plus sign () on the left side of the Events section header and an Add Event dialog box will appear. Choose a date, add a description and click the Add Event button. After the Event is added, you can delete it by clicking on the red 'X' () to the left of the event.



- News: Agency Administrators' news or announcements will appear here. News Items can be added by clicking on the green plus sign () on the left side of the News section header and an Add News dialog box will appear. Add a description, format the text with the tools provided and click the Add News button. After the News Item is added, you can delete it by clicking on the red 'X' () to the left of the News Item.

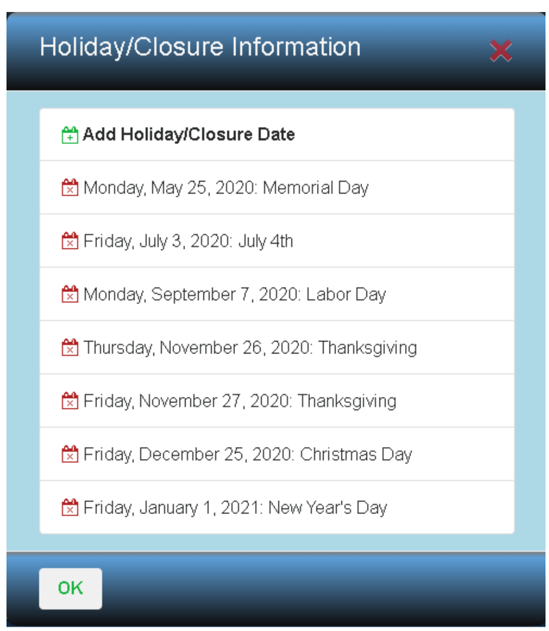


- <u>Ticker:</u> Scrolling Ticker items will appear here. This is only available to Resource Center users with EXEC or ADMIN security. Ticker Items can be added by clicking on the green plus sign ( ) on the left side of the Ticker section header and an Add Ticker dialog box will appear. Add an expiration date (when ticker item will no longer appear), a message and click the Add Ticker button. After the Tickers Item is added, you can delete it by clicking on the red 'X' ( ) to the left of the Ticker Item.

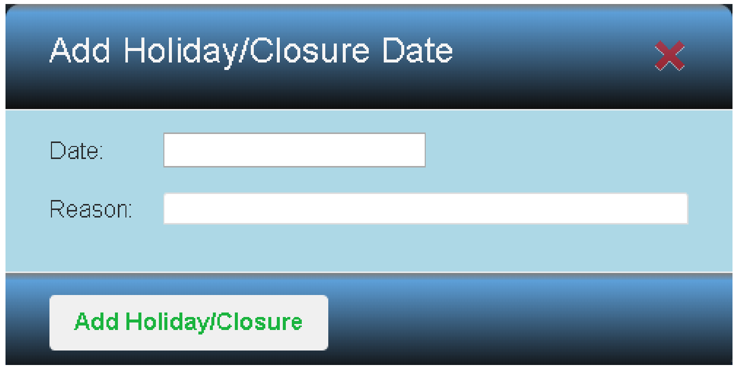


The Ticker Items will scroll on the bottom of the screen. Each Ticker Item separated by the 'A' from the Agency Administrators logo ( ).

- <u>Office Closures:</u> Agency Administrators' Office Closures will appear here. With the date and reason listed in chronological order. The Office Closure list can be modified by clicking on the yellow pencil ( ) on the left side of the Office Closures section header.



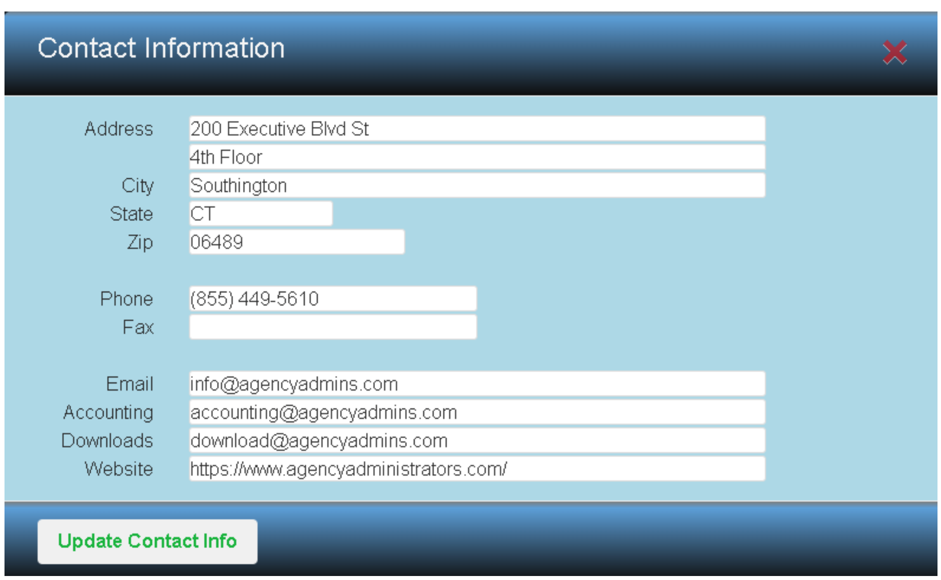
Click on the Add Holiday/Closure Date row on top of the list to add an Office Closure. An Add Holiday/Closure Date dialog will appear. Enter a date, reason and click on Add Holiday/Closure button to add the Office Closure.



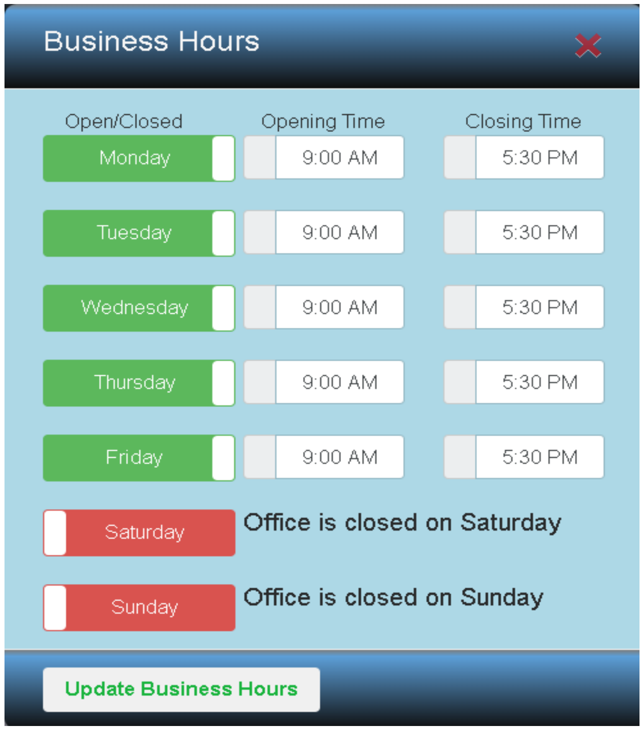
To delete an existing Office Closure, click on any of the existing Office Closures to be prompted to delete the Office Closure

- Contact Info: Agency Administrators' contact info will appear here including:
  - Business Address
  - Phone Number
  - Email Addresses
  - Website

The Contact Information can be modified by clicking the yellow pencil () on the left side of the Contact Info section header. A Contact Information dialog will appear. Make the necessary modifications and click Update Contact Info button to save.



- <u>Business Hours</u>: Agency Administrators standard hours of operation will appear here. The Business Hours can be modified by clicking on the yellow pencil ( ) on the left side of the Business Hours section header.



Click on the day of the week to toggle between the office being opened and closed. For days where the office is open, click on the Opening and/or Closing Time to change the time. Click on Update Business Hours to save changes.

- <u>Resource Center Reference Guide:</u> A link to this document.

Team Information Pod

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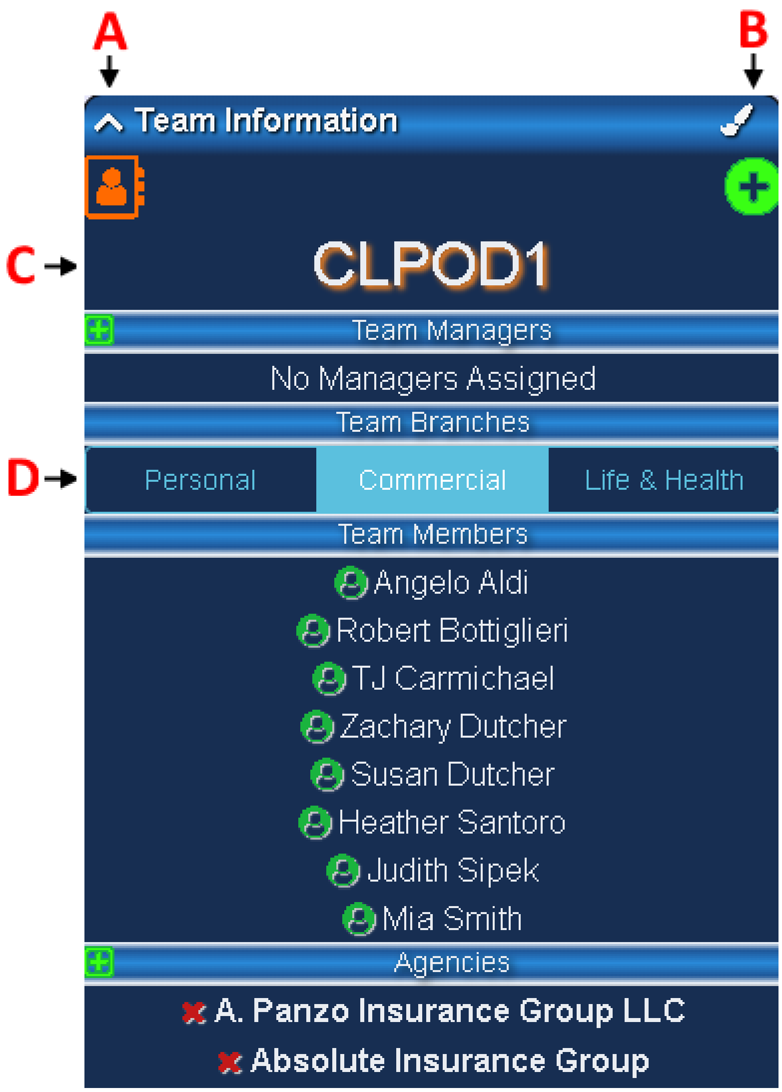

The Team Information Pod contains information, tools and functionality related to the selected Team. Teams can be selected from a couple of locations in the Resource Center:

- Clicking the Team Catalog icon (**A**)
- Clicking on the Team Name (**C**)

A Team can be added to the Resource Center by clicking on the Add Team icon (**B**). When clicked, an Add AA Resource Center Team dialog will appear. Enter a Team Name and an ID, then click the 'Add Team' button.

The following is a listing of the Pod sections and their purpose:

- Team Managers. A listing of the Team Managers with availability icons. Team Managers can be added by clicking the green plus sign ( ) on the left side of the Team Managers section header. A list of users with the Team Manager security provided in a drop-down list. Select a user and click Add Manager. Any Team Manager can be removed from the list by clicking the red X ( ) to the left of their availability icon.

- Team Branches. Toggle buttons (**D**) which depict whether the Team handles Personal, Commercial, Life & Health or any combination of clients. Click on Personal, Commercial or Life & Health to toggle which Branches that apply. Any changes will be prompted for a change confirmation.

- Team Members. A listing of any Team Members. These members are assigned to a team utilizing the User Info pod.

- Agencies. A listing of Agencies supported by the selected Team. Team Agencies can be added by clicking the green plus sign ( ) on the left side of the Agencies section header. A list of Agencies is provided in a drop-down list. Select an Agency and click Add Agency. Any Team Agency can be removed from the list by clicking the red X ( ) to the left of Agency name.

Agency Information Pod

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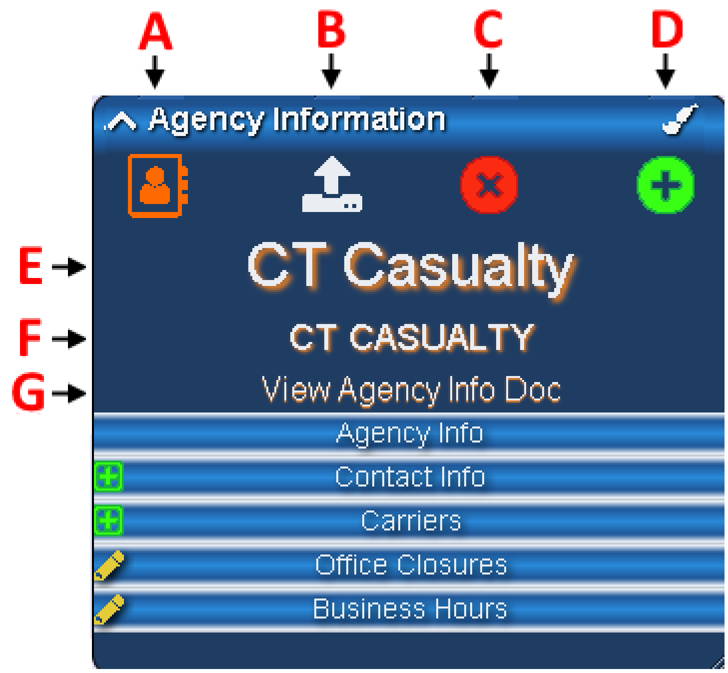


The Agency Information Pod contains information, tools and functionality related to the selected Agency. Agencies can be selected from various locations in the Resource Center:

- Clicking the Agency Catalog icon (**A**)
- Clicking the Agency Name (**E**)
- Clicking on an Agency Name in the Header Bar
- Choose the Agency in the Producer Code Credentials section of the User Information Pod.

The Agency Information Pod contains a set of Administrator/Exec tools across the top:

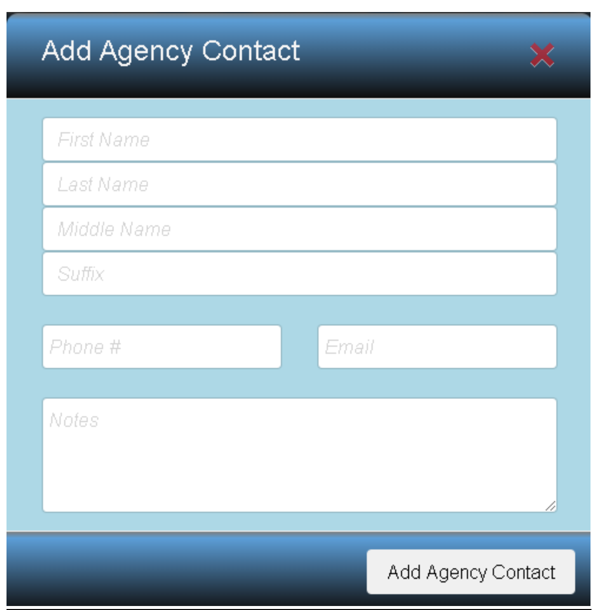
- Agency Catalog icon (**A**), to choose an Agency
- Update Agency Info Doc (**B**)
- Delete the selected Agency (**C**)
- Add a new Agency (**D**)

Along with the Agency Catalog icon (**A**) and Agency Name (**E**), the Pod header contains the Agency ID (**F**) and a link to the Agency Information PDF (**G**). The following is a listing of the Pod sections and their purpose:

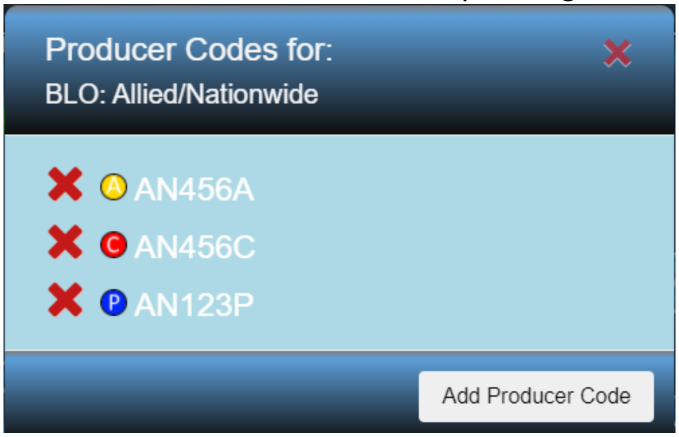
- Agency Info. Here the user can find information about the selected Agency regarding;
  - Mailing Address
  - Business Address
  - Phone Number
  - Texting Information
  - Fax Number
  - Website
  - License Number
  - Notes

- Contact Info. A listing of any Agency Contacts including:
  - Name
  - Phone Number
  - Email Address
  - Notes

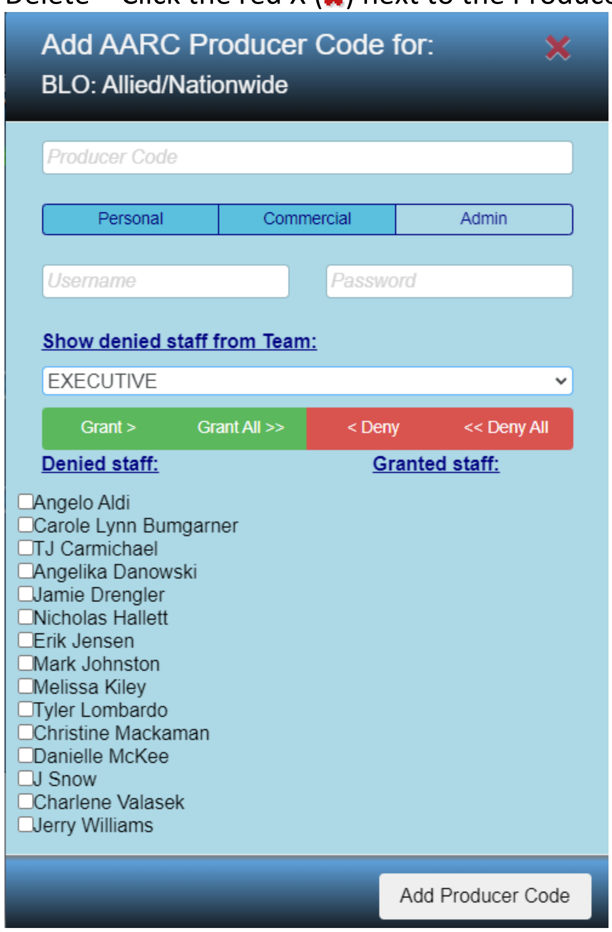
  This information can be updated by clicking on the Contact Name. It can be deleted by clicking on the red X () in front of the name. It can be moved up and down the list of contacts by clicking the up and down arrows to the right side of the contact info (). A new contact can be added by clicking the green plus sign () on the left side of the Contact Info section header and an Add Agency Contact dialog box will appear. Add the Contact's name, Phone, E-mail and/or any notes and click 'Add Agency Contact' button to append the contact to the existing list of Agency Contacts.



- Carriers. Any associated Carriers listed alphabetically with their associated Producer Code & Credentials. The Carrier's information can be loaded in the Carrier Information Pod by clicking the Carrier Name.
    - The Producer Code can be edited by clicking on the Producer Code icon ( ).

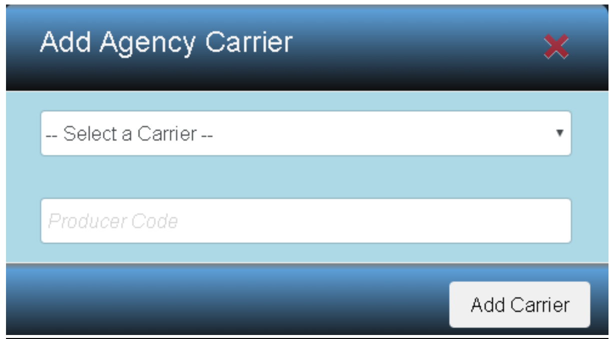


    - Here you can:
        - Add – Click on the "Add Producer Code" button
        - Edit – Click on the Producer Code
        - Delete – Click the red X ( ) next to the Producer Code

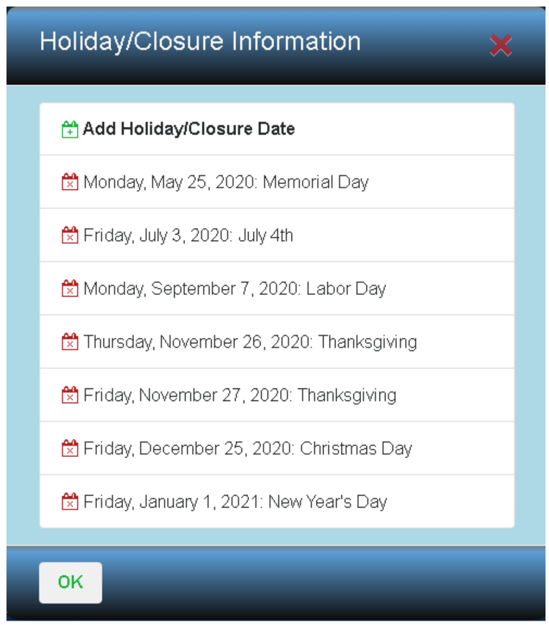


- In the Add/Edit Producer Code form you can manage the following properties of the Producer Code:
    - The Producer Code
    - The Producer Code Branch
        - Personal and/or Commercial
        - Admin
    - The Producer Code Credentials (Username & Password)
    - The Producer Code Access – Who is granted access to this Producer Code & its credentials
        - Use the Team dropdown list to choose the Team Members from which the Denied Staff List will be populated.
        - Only those Team members who are not in the Granted Staff List will appear in the Denied Staff List.
        - Click on any of the 4 buttons to manipulate the lists:
            - ***Grant*** – Grants access to this Producer Code & its credentials to the “Checked” Members of the Denied Staff List.
            - ***Grant All*** – Grants access to this Producer Code & its credentials to **ALL** Members of the Denied Staff List.
            - ***Deny*** – Denies access to this Producer Code & its credentials to the “Checked” Members of the Granted Staff List.
            - ***Deny All*** – Denies access to this Producer Code & its credentials to **ALL** Members of the Granted Staff List.

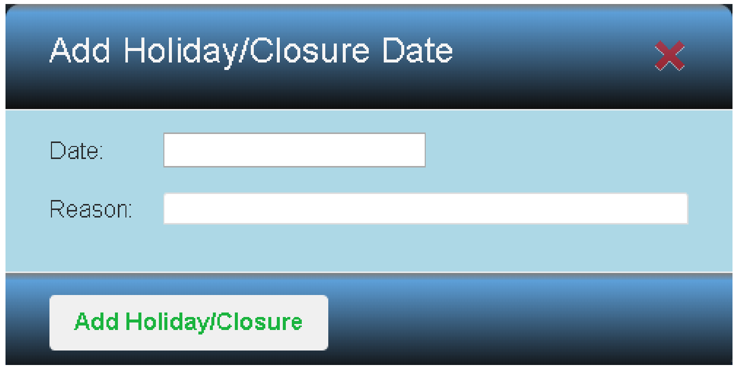
- The Carrier can be removed from its affiliated Agency by clicking on the red X (✖). A Carrier can by to the Agency's list of Carriers by clicking on the green plus sign (➕) An Add Agency Carrier Dialog will appear. Selected a Carrier from the list and enter a Producer Code if available and click the Add Carrier button to add the Carrier.



➢ <u>Office Closures</u>: Agency's office closures will appear here. With the date and reason listed in chronological order. The Agency Closure list can be modified by clicking on the yellow pencil (✏) on the left side of the Office Closures section header.

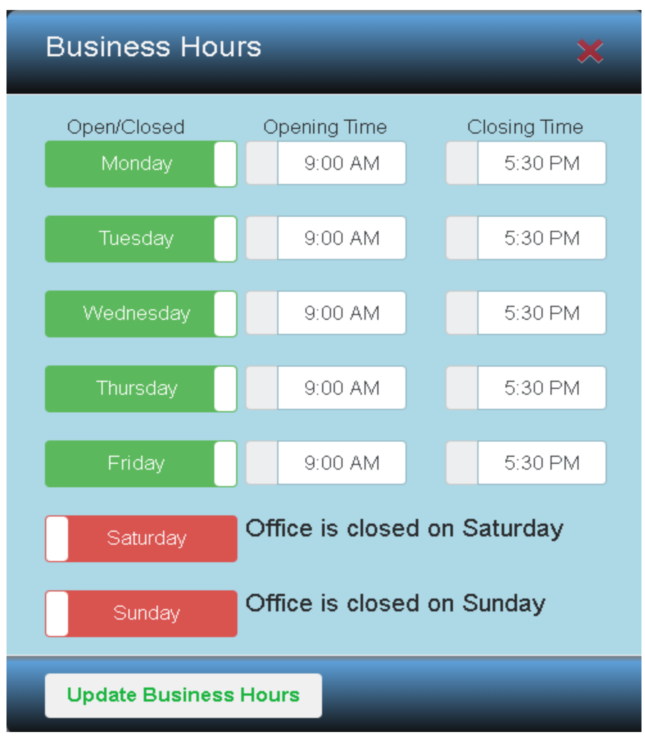


Click on the Add Holiday/Closure Date row on top of the list to add an Office Closure. An Add Holiday/Closure Date dialog will appear. Enter a date, reason and click on Add Holiday/Closure button to add the Office Closure.



To delete an existing Office Closure, click on any of the existing Office Closures to be prompted to delete the Office Closure

- <u>Business Hours</u>: The Agency's standard hours of operation. The Business Hours can be modified by clicking on the yellow pencil ( ) on the left side of the Business Hours section header.



Click on the day of the week to toggle between the office being opened and closed. For days where the office is open, click on the Opening and/or Closing Time to change the time. Click on Update Business Hours to save changes.

Carrier Information Pod

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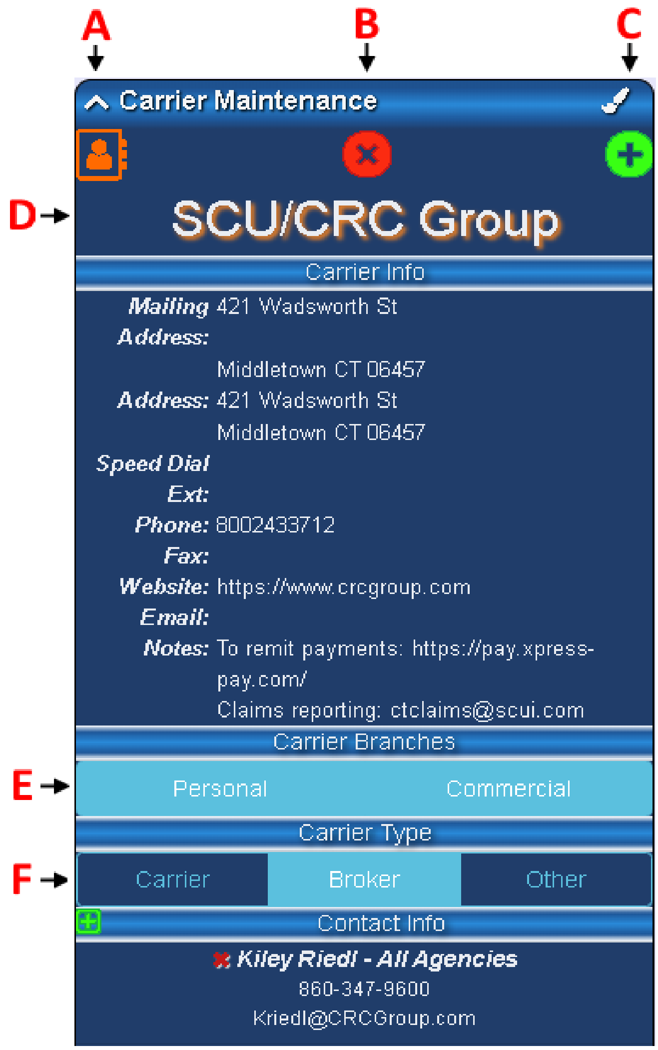


The Carrier Information Pod contains information, functionality and tools related to the selected Carrier. Carriers can be selected from various locations in the Resource Center:

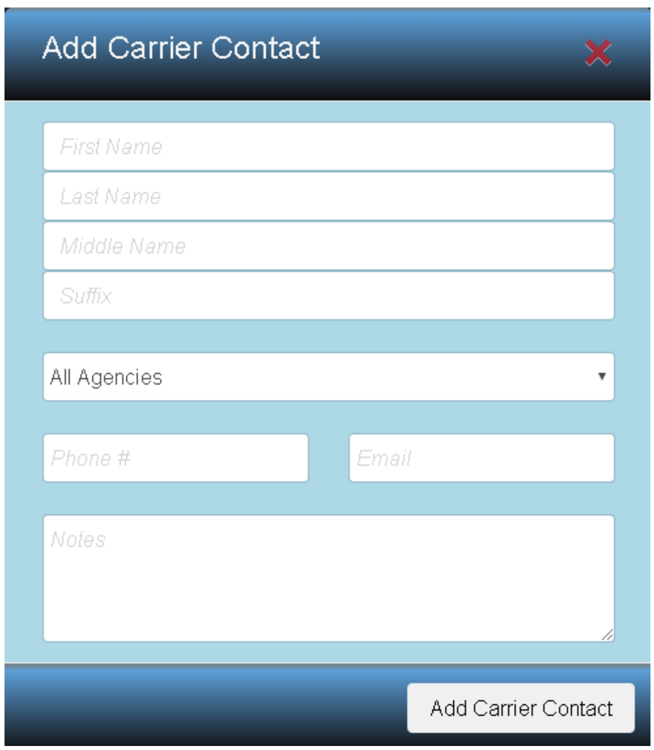
- Clicking the Carrier Catalog icon (**A**)
- Choose the Carrier in the Producer Code Credentials section of the User Information Pod.

The following is a listing of the Pod sections and their purpose:

- Carrier Info. Here the user can find information about the selected Carrier. This information can be edited by clicking on the Carrier Name (**D**)
  - Mailing Address
  - Business Address
  - Speed Dial Extension
  - Phone Number
  - Fax Number
  - Website
  - License Number
  - Notes

- Carrier Branches. Toggle buttons (**E**) which depict whether the Carrier is a part of the Personal Branch, Commercial Branch or both. Click on Personal or Carrier to toggle which Branches apply. Any changes will be prompted for a change confirmation.
- Carrier Type. Toggle buttons (**F**) which depict whether the Carrier is a Carrier, Broker, or Other type. Click on Carrier, Broker, or Other to choose which type applies. Any changes will be prompted for a change confirmation.

- Contact Info. A listing of any Carrier Contacts information including:
  - Name
  - Which Agency they support or All Agencies
  - Phone Number
  - Email Address
  - Notes
- This information can be updated by clicking on the Contact Name. It can be deleted by clicking on the red X ( ) in front of the name. A new contact can be added by clicking the green plus sign ( ) on the left side of the Contact Info section header and an Add Carrier Contact dialog box will appear. Add the Contact's name, Agency they support, Phone, E-mail and/or any notes and click Add Cattier Contact button to append the contact to the existing list of Carrier Contacts.



AARC Documents Pod

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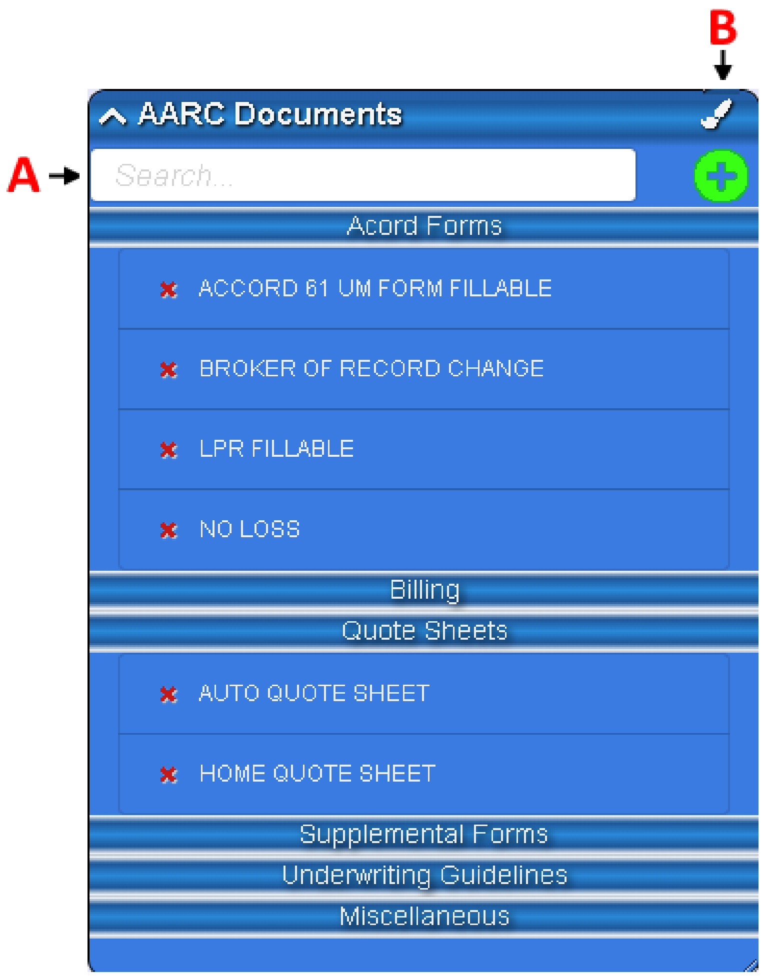

The AARC Documents Pod is a library of links to PDF documents in the Resource Center: The list of documents can be filtered by typing any part of the document's name in the filter text box (A). Documents can be added by clicking on the Add Document icon (B). When clicked you'll be prompted to select a file and a section to place the new document. Documents can be deleted from the Pod by clicking on the red X (✖) in front of the document name. Documents can be dragged from one section to another. The PDF Document links divided into the following Sections:

- Acord Forms
- Billing
- Quote Sheets
- Supplemental Forms
- Underwriting Guidelines
- Miscellaneous

AARC Links Pod

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The AARC Links Pod is a library of links to various resources in the Resource Center: The list of links can be filtered by typing any part of the link's text in the filter text box. The links are divided by Type Sections. A link can be added to any of the Type Sections by clicking the green plus (), on the left side of the Type Section Headers. When adding a link, you can add it for all Resource Center Users by checking the Add for all Agency Admins Users checkbox. Those will be displayed with an asterisk. Links can be deleted by clicking on the red X () in front of the links. Links are divided into the following Sections:

- <u>Phone</u>. Clicking on the link will automatically dial the number when clicked.
- <u>Email</u>. Will automatically generate an email to the link's target, using Outlook.
- <u>Web</u>. Will open a tab in your default browser to the link's website.
- <u>Property Cards</u>. Will open a tab in your default browser to the link's Property Card website

Underwriting Guidelines Pod

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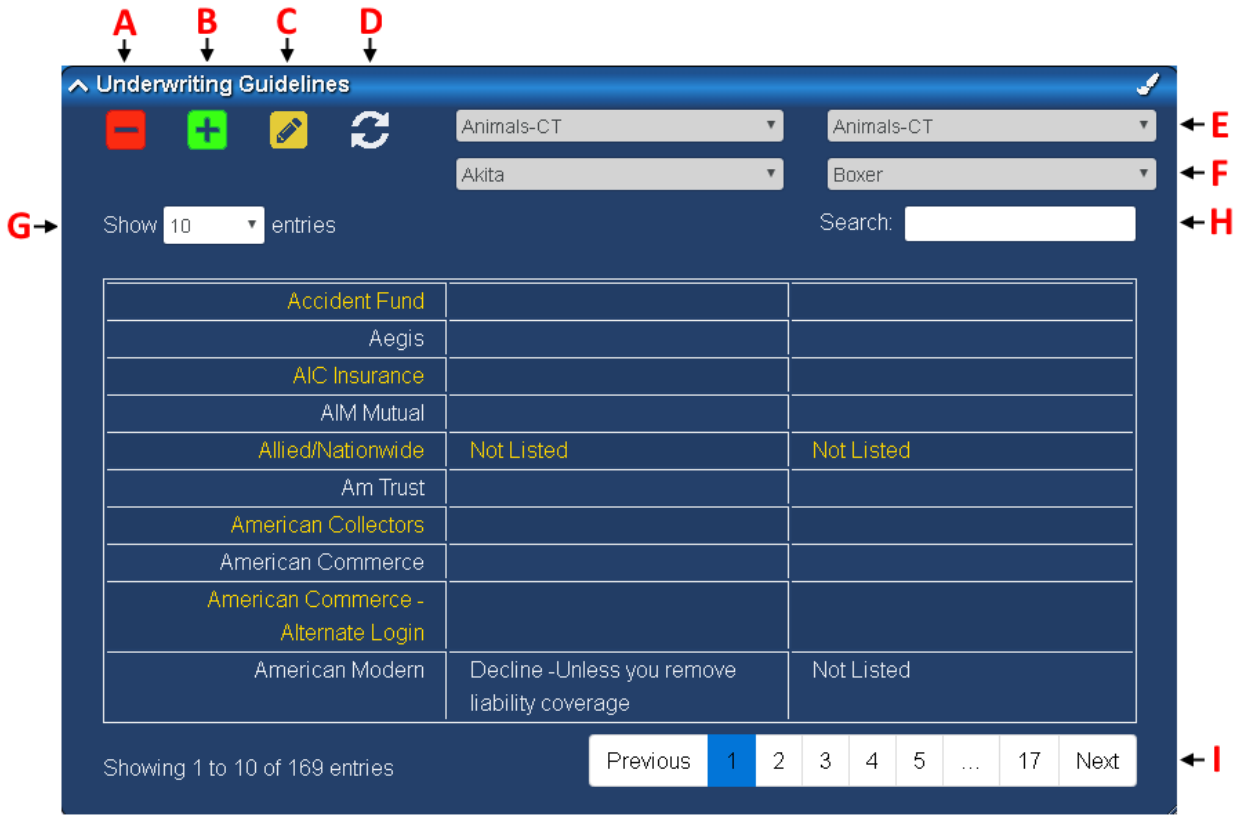
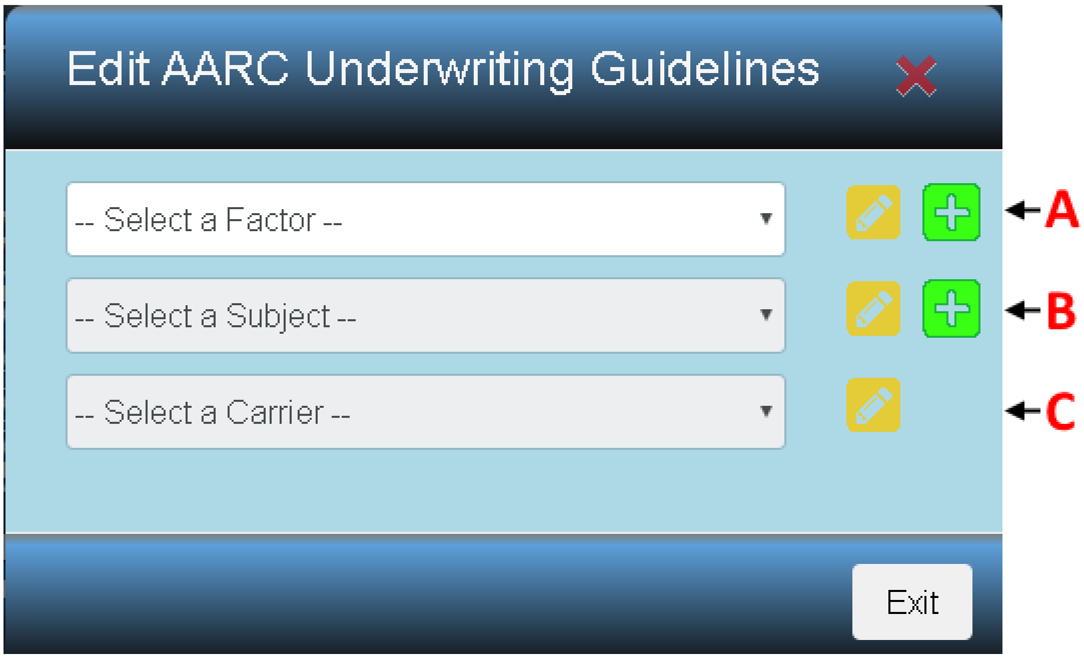


The Underwriting Guidelines Pod is a tool used to compare up to 3 subjects for all Carriers. The image above displays 2 Factor(**E**)/Subjects(**F**) (Animals-CT/Akitas and Animals-CT/Boxers). The second column (Animals-CT/Boxers in the image above) can be removed by clicking on the Remove Factor/Subjects icon (**A** -). Up to three columns of Factor(**E**)/Subjects(**F**) can be added by clicking on the Add Factor/Subjects icon (**B** -).

Once you have the number of Factor(**E**)/Subjects(**F**) set up, you can choose a Factor(**E**) for each column and a subset of Subjects(**F**) will appear. Upon selection of each Subject(**F**), the results grid will update. The results can be refreshed at any point to reflect any changes by clicking the Refresh icon (**D** -).

Adding, editing and removing Underwriting Guidelines can be done by clicking the Edit Underwriting Guidelines icon (**C** -). Upon clicking the icon, an Edit Underwriting Guidelines dialog will appear:



- A Factor can be added by clicking on the Add Factor icon (**A** -).
- A Factor name can be edited by clicking on the Edit Factor icon (**A** -).
- A Subject can be added by clicking on the Add Subject icon (**B** -).
- A Subject name can be edited by clicking on the Edit Subject icon (**B** -). When a new Subject is added, a blank Underwriting Guideline is automatically created,
- An Underwriting Guideline can be edited by clicking on the Edit Underwriting Guideline icon (**C** -).