# Steps for New Features within the Agency Portal

#### New to the Agency Portal:

- Ability to add/delete users within the agency portal
- o Each user will have their individual user name and password
- Active Accounts having either the Master or Agent Role can manage new user accounts

Below are screen shots of each new page and instructions for creating/removing users

Definitions of each role explained on the last page

Any changes or incorrect information on the agency portal under the Agent ID, please let us know

Contact Information for Technical Difficulties By phone (1.800.922.5332) or email

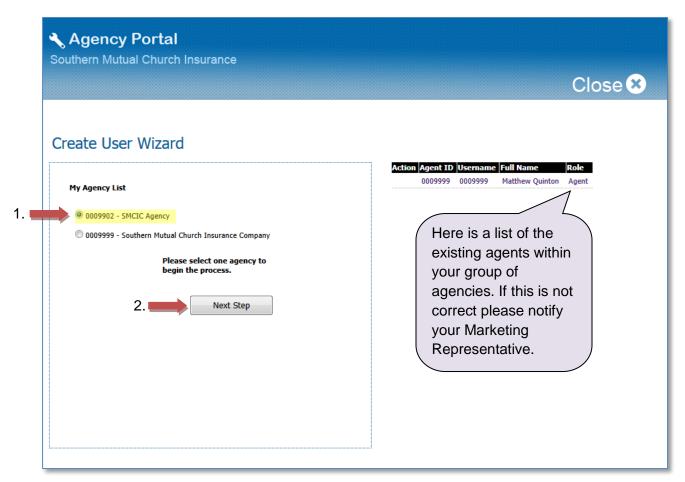
Troy Areheart at tareheart@smcins.com

Chris Varnadoe at cvarnadoe@smcins.com

Peggy Cook at <a href="mailto:pcook@smcins.com">pcook@smcins.com</a>

If any problems occur we will promptly address any issues that may arise

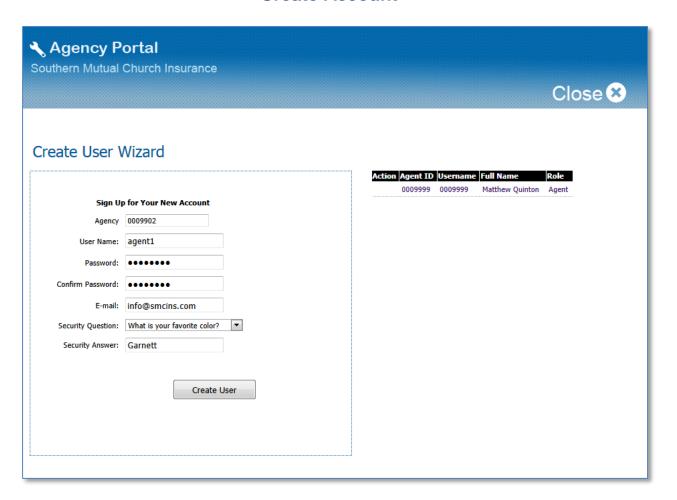
### **Agency List**



### Step A

- 1. Select agency of choice from list
- 2. Click Next Step Button to continue

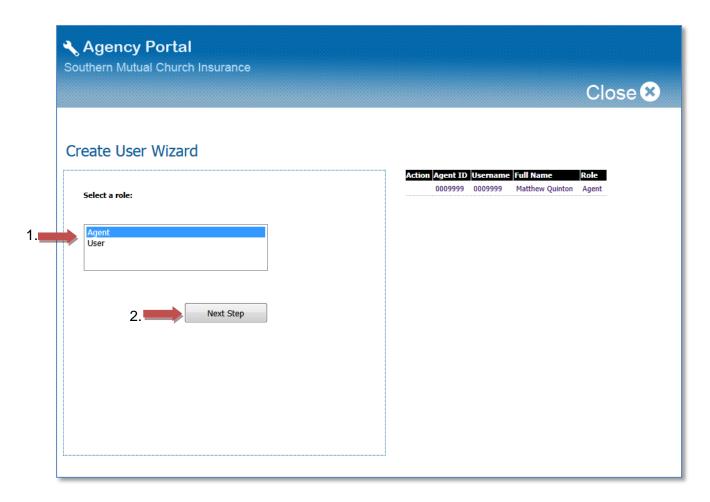
#### **Create Account**



### Step B

- 1. Fill in required information (you will need to fill this out for each individual user)
- 2. User Names must be unique (consist of numbers, letters and special characters up to 10 max)
- 3. Password consist of numbers, letters and at least 1 special character up to 12 max (password can be the same for all users for consistency)
- 4. Email address is required for each user in case of the password has been forgotten
- 5. Security Answer is vital in order to change password
- 6. Click on Create User

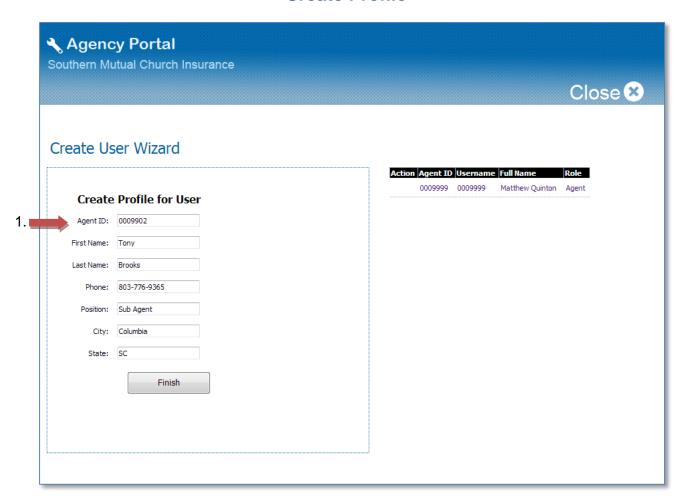
### **Select Role**



# Step C

- 1. Select level of role for your new user account (explanations of roles are explained on the last page)
- 2. Click the Next Step button to move forward

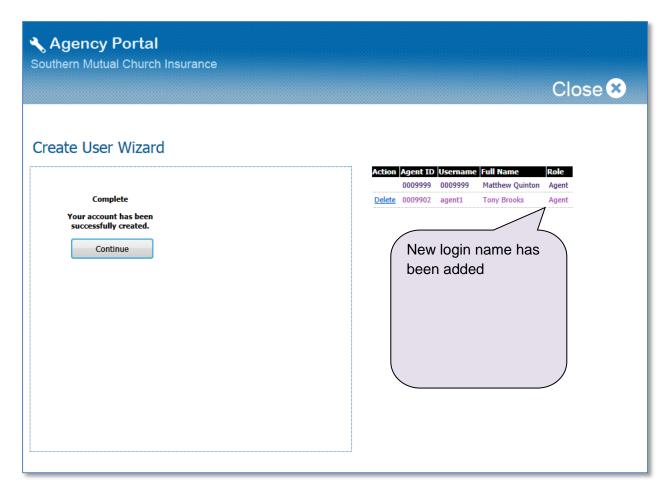
### **Create Profile**



## Step D

- 1. Agent ID cannot be changed
- 2. Fill in remaining profile information
- 3. Click Finish

## **Entry Completed**



Note: To add more users click continue or if finished click close (top right hand corner)

## **Role Definitions**

	Master	o.M.	<u> </u>
	Mass	P.Gr.	1 <sub>28</sub>
Create accounts with Agent roles	•	0	0
Create accounts with User roles	•	•	0
Submit online quotes	•	•	•
View list of processed policies	•	•	0
Claim history listing	•	•	0
SMCI Employee Directory	•	•	0
Agency Bulletin(s)	•	•	0
Supplies Request	•	•	0
Policy list by policy number	•	•	•
Policy list by insured name	•	•	•
Change password	•	•	•
Manage user accounts	•	•	0
View entire book of business	•	0	0
View book of business from his or her agency only	•	•	0
Access to policy forms	•	•	•
Access to state exception forms	•	•	•
Access to claim loss forms	•	•	•
Access to loss forms	•	•	•
Create master role	0	0	0

●= yes, ○= no