

# Steps for New Features within the Agency Portal

New to the Agency Portal:

- Ability to add/delete users within the agency portal
- 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](mailto:tareheart@smcins.com)

Chris Varnadoe at [cvarnadoe@smcins.com](mailto:cvarnadoe@smcins.com)

Peggy Cook at [pcook@smcins.com](mailto:pcook@smcins.com)

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

# Agency List


Agency Portal

Southern Mutual Church Insurance

Close

Create User Wizard


My Agency List

1. 

☒ 0009902 - SMCIC Agency

☐ 0009999 - Southern Mutual Church Insurance Company

Please select one agency to begin the process.

2. 

Next Step

Action	Agent ID	Username	Full Name	Role
	0009999	0009999	Matthew Quinton	Agent


Here is a list of the existing agents within your group of agencies. If this is not correct please notify your Marketing Representative.


## Step A

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

2

## Create Account

 **Agency Portal**  
Southern Mutual Church Insurance

Close 

### Create User Wizard

**Sign Up for Your New Account**


Agency:

User Name:

Password:

Confirm Password:

E-mail:

Security Question:  


Security Answer:


Action	Agent ID	Username	Full Name	Role
	0009999	0009999	Matthew Quinton	Agent

### 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

 **Agency Portal**  
Southern Mutual Church Insurance

Close 


### Create User Wizard

Select a role:

1. 

Agent

User

2. 


Next Step


Action	Agent ID	Username	Full Name	Role
	0009999	0009999	Matthew Quinton	Agent

### 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

 **Agency Portal**  
Southern Mutual Church Insurance

Close 

Create User Wizard

**Create Profile for User**

1. 

Agent ID:

First Name:

Last Name:

Phone:

Position:

City:


State:


Action	Agent ID	Username	Full Name	Role
	0009999	0009999	Matthew Quinton	Agent

## Step D

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

## Entry Completed

 **Agency Portal**  
Southern Mutual Church Insurance

Close 

### Create User Wizard

**Complete**

Your account has been successfully created.

[Continue](#)

Action	Agent ID	Username	Full Name	Role
	0009999	0009999	Matthew Quinton	Agent
<a href="#">Delete</a>	0009902	agent1	Tony Brooks	Agent

New login name has been added

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

## Role Definitions

	Master	Agent	User
Create accounts with Agent roles	●	○	○
Create accounts with User roles	●	●	○
Submit online quotes	●	●	●
View list of processed policies	●	●	○
Claim history listing	●	●	○
SMCI Employee Directory	●	●	○
Agency Bulletin(s)	●	●	○
Supplies Request	●	●	○
Policy list by policy number	●	●	●
Policy list by insured name	●	●	●
Change password	●	●	●
Manage user accounts	●	●	○
View entire book of business	●	○	○
View book of business from his or her agency only	●	●	○
Access to policy forms	●	●	●
Access to state exception forms	●	●	●
Access to claim loss forms	●	●	●
Access to loss forms	●	●	●
Create master role	○	○	○

●= yes, ○= no