

FRONTLINE INSURANCE ADMIN USER GUIDE

Summer 2017, Version 1.0



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PRODUCER ADMINISTRATOR ADD NEW USER

THE ROLE

The role of a Producer Administrator is to oversee the users access within your branch. This administrator will have the ability to add/remove portal users that quote, bind, and service policies.

THE PROCESS

1. Sign into Agency Portal as the Producer Admin.
2. Click on the Manage Users link (this will bring you to the User Management Screen)
3. Click on the Actions Link
Click on New User
4. Under the Basics tab, fill out the following fields:
 - a. First Name
 - b. Last Name
 - c. User-name (producer's email address)
 - d. Active button should default to "yes"
 - e. User type should default to "producer"
 - f. Primary Phone should be "Work"
 - g. Enter Work Phone Number
 - h. Enter Fax (if applicable)
 - i. Enter Email Address

New User

Update Cancel

Basics Access Roles Profile Region

Prefix <none> x

First name

Middle name

Last name *

Suffix <none>

Username *

Active * Yes No

Organization * Frontline Insurance

User Type * Producer

Policy Writer

Policy Writer Date Start

Policy Writer Date End

Contact Information

Torrent Flood ID

Employee ID

Use Organization Address Yes No

Primary Phone * <none>

Fax

Email Address

FEATURE:

At the bottom left of each page, you As a Producer Administrator you will have an additional button called "Manage Users" which once selected will give you access to the management system.

REMEMBER:

Only Frontline Insurance and your agency principal can assign an Administrator user All agent portal users will have the "producer" role by default.

RESOURCES:

PORTAL TRAINING HELP:
407-444-0481

PRODUCER ADMINISTRATOR ADD NEW USER, CONT.

5. Click on the Access tab
 - a. Click on Add
 - b. Select and click the Group (location) the use will have access to.
 - i. Group: Will be prefilled with the Group name.
 - ii. Primary: Check the primary box for the Group (location) the user is in
 - iii. Member: Will prefill to Yes
 - iv. Manager: Not Required, leave blank
 - c. If the user has access to multiple locations, you need to add each Group (location) separately by following the same steps 5a & 5b.

Update Cancel

Basics Access Roles Profile

Use Producer Code security Yes

Groups

Add Remove

6. Click on the Roles Tab
 - a. Click on the drop box below Name
 - b. Select Producer

Basics Access Roles Profile

Remove

<input type="checkbox"/>	Name	Description
<input type="checkbox"/>	Producer	Permissions for producer

7. Click on Update

Update Cancel

FEATURE:

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REMEMBER:

Only Frontline Insurance and your agency principal can assign an Administrator user All agent portal users will have the "producer" role by default.

RESOURCES:

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PRODUCER ADMINISTRATOR: DISABLE USER

1. Sign into Agency Portal as the Producer Admin
2. Click on the Manage Users link (this will bring you to the User Management Screen)
3. Search for User by Username or First and Last name

Users	
Username	<input type="text"/>
First name	<input type="text"/>
Last name	<input type="text"/>

4. Select User under Search Results

Name	Username	Organization	Group Name
Test User	testuser@fihl.com	Insurance Intermediaries, Inc.	Insurance Intermediaries, Inc. - Darden - Hampstead

5. Click Edit

<input type="button" value="Edit"/>	<input type="button" value="Delete User"/>
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6. Click "No" to the right of "Active"

Active	<input type="radio"/> *	<input type="radio"/> Yes	<input checked="" type="radio"/> N
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7. Click Update

<input type="button" value="Update"/>	<input type="button" value="Cancel"/>
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FEATURE:

At the bottom left of each page, you As a Producer Administrator you will have an additional button called "Manage Users" which once selected will give you access to the management system.

RESOURCES

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PRODUCER COMMISSION ROLE

THE ROLE

The producer commissions role allows the user access to view Commission Statements as Producer Commissions. Producer Commissions has the ability to view commission statements.

PROCEDURE

1. Sign into Agency Portal as the Producer Commissions
2. Click on the Reports link
3. Select the hyper-link for the statement you would like to view

COMMISSION STATEMENTS

DATE	STATEMENT	AMOUNT
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PRODUCER PRINCIPAL ROLE

THE ROLE

The producer principal role is assigned by Frontline Sales Administrative team. If a producer also has the principal role he or she can add/remove administrator and commission users.

RESOURCES

PORTAL TRAINING HELP:
407-444-0481

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RESOURCES

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FRONTLINE WEBSITE: www.frontlineinsurance.com