How to Use the Agency Principal Portal

How to invite users

Agency Principal users will be able to invite additional agency staff to the agent portal.

As an Agency Principal, you may invite users to the Agent portal by selecting the Invitation tab. Select the proper User Role from the drop-down choices. Below the drop-down, all fields designated with an asterisk must be completed.

Then click on the Generate Invitation Email to send the invitation to the user.

Agency Principal users can view the details of each invitation through the Agency Signup Queue. This page allows the user to view the status of all invitations. The Agency Principal can filter the view by User Role or Status of the invitation, as well as view the Invited On date.

How to view the Dashboard

The Agency Principal can view reports on the Dashboard. Select the Dashboard tab from the top navigation bar. This screen will display product enrollment application metrics, as well as quotes by product metrics for the agency. To view metrics by year, month, week, or today, select the proper drop-down choice in the View By menu for the desired time period. Metrics are displayed by product, agent, and status.
How to view the Book of Business

The Agency Admin can view the Book of Business by agent or for the agency by selecting from the Existing Business for Agent drop-down menu.

How to invite agency support staff

Selecting the Associate Agents tab allows the user to view a list of support staff associated with the current agency. This list can be filtered by User ID, First Name, Last Name, and Email. Agency Principal users are able to manage support staff assigned to agents by selecting the Manage link in the Action column.

The system allows one or more agents to be associated with a support staff user. It is possible for an agent to have one or more agency support staff working with him/her. Agents and support staff must belong to the same Tax ID.