Agency Admin capabilities

Through the Agency Admin portal, you have access to view and invite agents to view the Book of Business as well as examine Dashboard Reporting Metrics by product, agents, and status. The Agency Admin can also manage users through the portal. The Agency Admin has the same functionality as the Agency Principal, except for viewing commissions, which is not yet available.

How to invite users

Users with Agency Admin access to the portal can add Agent-level users by invitation. This invitation can only be generated by users with administrative privileges.

As an Agency Admin, the user may select 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** button to send the invitation to the agent.

The user with Agency Admin privileges 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 Admin 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 Admin can view reports on the **Dashboard**. Select the **Dashboard** tab from the top navigation bar. This screen shows you 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 to populate metrics 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 view 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 Admin 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.