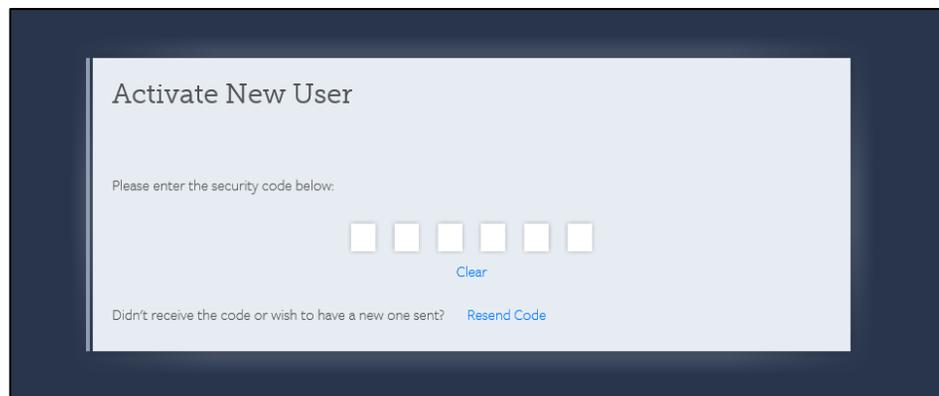
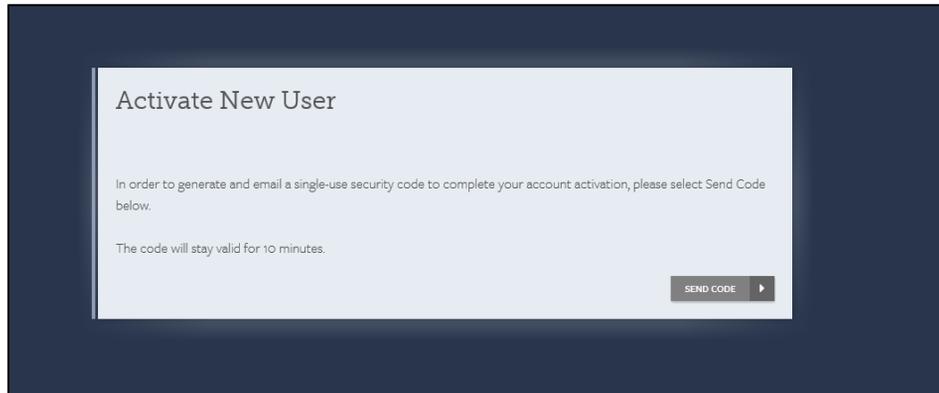


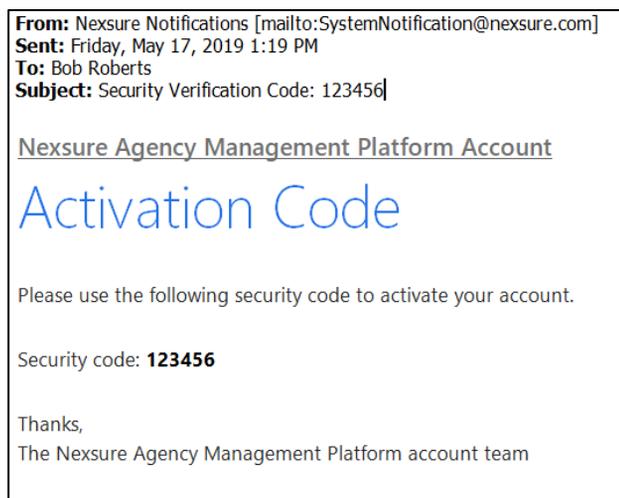


How To Activate Retail Agent Portal

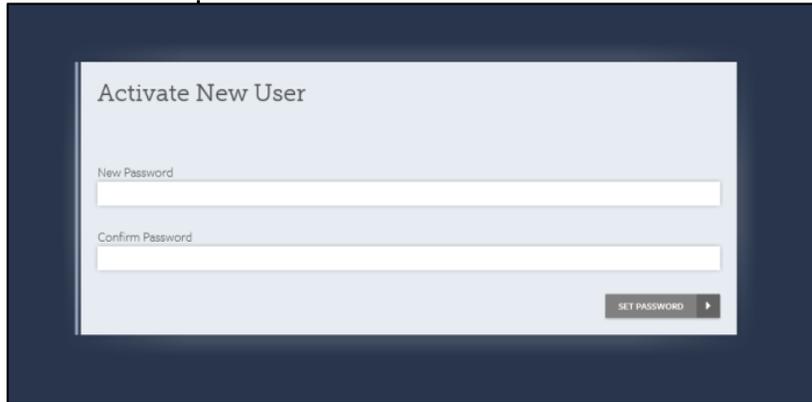
1. When you receive the Retail Agent Portal Access email, click on the activation link within the email to access the 'Activate New User' page. Click the 'send code' button to receive your activation code. It will open a new window to enter the code.



The email received with the activation code will look like the one below. It will contain the activation code to be entered on the screen above.



2. Once the code is entered and validated, you are automatically taken to the final screen to enter a new password. Once the new password is entered both in the New Password and Confirm Password boxes, click the 'set password' button.

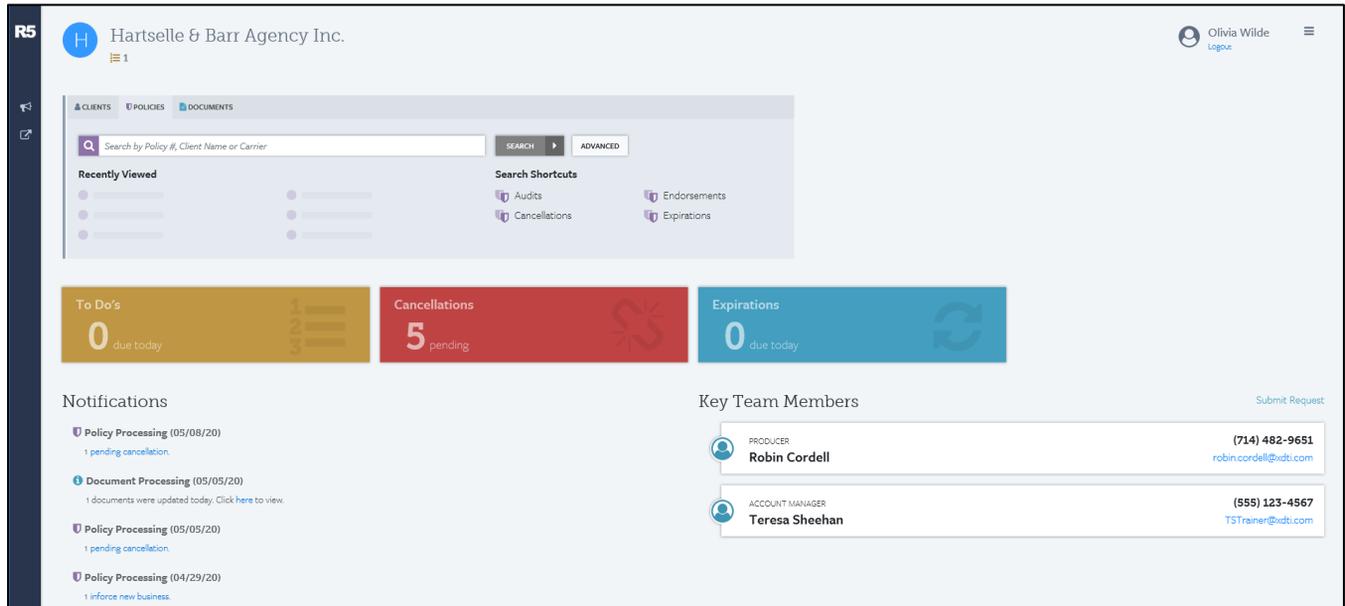


You are then taken to the login page with a message indicating your account has been activated, at which point you enter your username and password to login.

Agency Portal Guide

The agency portal gives you access to view your agency's policy documents; such as endorsements, policy renewal notifications, audits, pending cancellations, rescissions, commission statements, and upcoming expirations.

The dashboard also provides you with the following information: account summary, contacts, locations, recent activity, and key team members. See below for a screenshot of the agency **dashboard**:



Hartselle & Barr Agency Inc.

Olivia Wilde
Logout

CLIENTS | POLICIES | DOCUMENTS

Search by Policy #, Client Name or Carrier

SEARCH | ADVANCED

Recently Viewed

Search Shortcuts

- Audits
- Endorsements
- Cancellations
- Expirations

To Do's: 0 due today

Cancellations: 5 pending

Expirations: 0 due today

Notifications

- Policy Processing (05/08/20) - 1 pending cancellation.
- Document Processing (05/05/20) - 1 documents were updated today. [Click here to view.](#)
- Policy Processing (05/05/20) - 1 pending cancellation.
- Policy Processing (04/29/20) - 1 enforce new business.

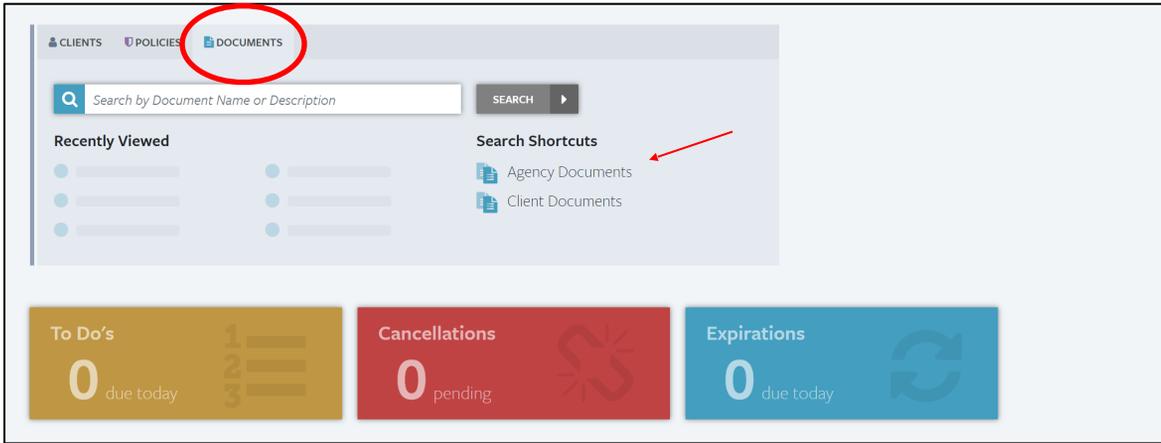
Key Team Members

Submit Request

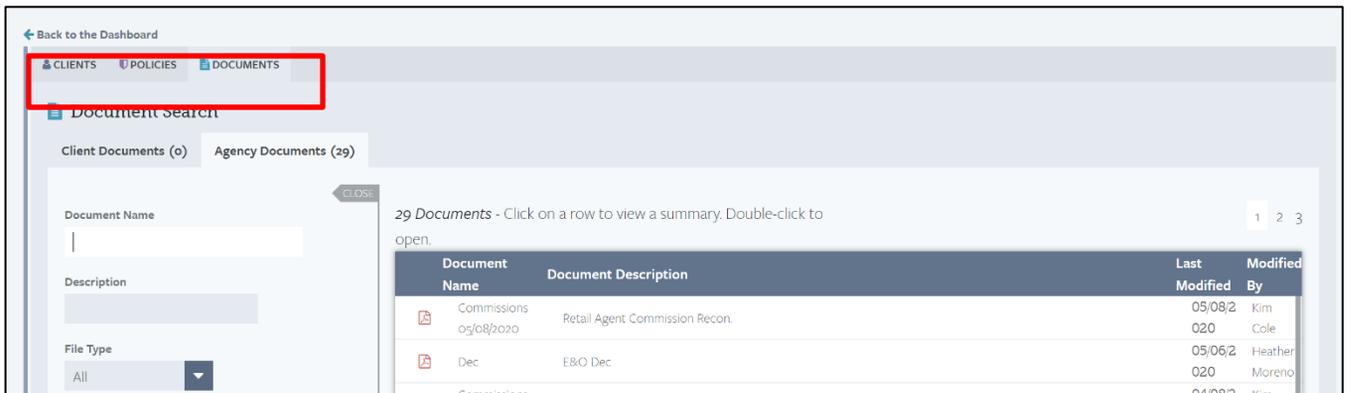
| | | |
|-----------------|-----------------------|--|
| PRODUCER | Robin Cordell | (714) 482-9651 robin.cordell@xdt.com |
| ACCOUNT MANAGER | Teresa Sheehan | (555) 123-4567 TSTrainer@xdt.com |

Commission Statements:

Commission statement can be easily viewed online by clicking the **Documents** tab and selecting **Agency Documents**.

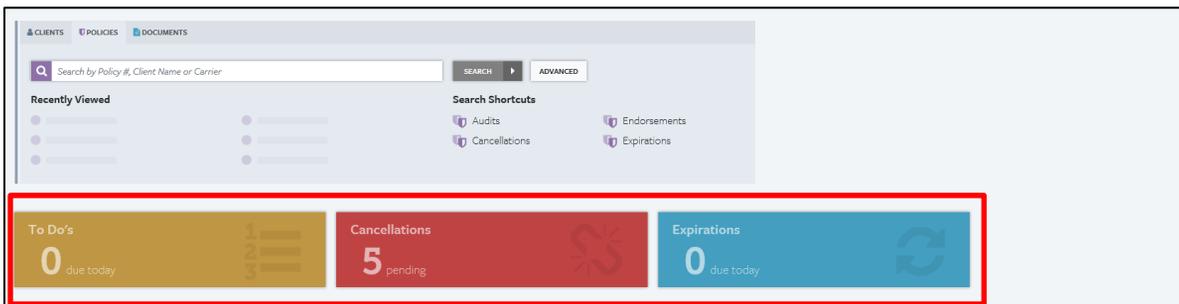


Clients, Policies and Documents:



- *Clients*: search capability to locate clients, search shortcuts to Personal and Commercial clients listing(s) and recently viewed clients
- *Policies*: search capability to locate policies, search shortcuts to view audits, cancellations, endorsements, expirations and recently viewed policies
- *Documents*: search capability to locate documents, search shortcuts for agency and client documents

Retail Agent Live Tiles:



- To Do's: *This will be a future capability.*
- Cancellations: Shows all pending cancellations, as well as, cancelled and reinstated policies within the last month.
- Expirations: Shows upcoming policy renewals within 90 days.

Notifications:

- Shows all recent activity; including cancellations, new documents available for viewing, new business, endorsements, commission statements, E&O coverage expiration, etc.
- Shows key team members assigned to your agency and their contact information:

The dashboard features three summary cards at the top: 'To Do's' with 0 due today, 'Cancellations' with 0 pending, and 'Expirations' with 0 due today. Below these are two main sections: 'Notifications' and 'Key Team Members'. The 'Notifications' section contains two items: 'E & O Coverage Expiration' (with a red arrow pointing to the text) and 'Commission Statement (04/08/20)' (highlighted with a red box). The 'Key Team Members' section lists Thomas Wold (Territory Marketing MGR) and Dustin Choe (Account Manager) with their contact information.

Client View:

To view information for your Personal Lines or Commercial Client, you will click on the shortcuts on the main page:

The screenshot shows the client view for 'Hartselle & Barr Agency Inc.' with a navigation bar for QUOTES, CLIENTS, POLICIES, and DOCUMENTS. A search bar is present with 'SEARCH' and 'ADVANCED' buttons. A red circle highlights the 'Search Shortcuts' menu, which includes 'Personal Clients' and 'Commercial Clients'. A 'Recently Viewed' list is also visible on the left.

Policies:

Click on any row to expand the policy and view the summary of insurance details for that line of business.

| Policies | | | | | | | |
|---|-------------------------|-------------------------|-------------------------|-------------|-------|--------|------------|
| FILTERS | | | | | | | |
| 3 policies found. Click on any row to expand. | | | | | | | |
| | POLICY # / PREMIUM | PROGRAM / LOB(S) | POLICY TERM | POLICY TYPE | MODE | STAGE | STATUS |
| Continental Casualty Co | GL4566888 \$1,500.00 | General Liability - ... | 10/30/2018 - 10/30/2019 | Monoline | New | Policy | Reinstated |
| Progressive | UM456466 \$750.00 | Umbrella - Commercia... | 11/13/2018 - 11/13/2019 | Monoline | New | Policy | Reinstated |
| The Hartford | WC123456 \$5,000.00 | Workers Compensation... | 04/07/2019 - 04/07/2020 | Monoline | Renew | Policy | In Force |

Documents:

Click on the Documents link to access any documents Risk Innovations has made viewable. Click on a row to view a summary or double click to open. If available, the Upload icon can be clicked on to open the Add New Document option to upload documents.

The screenshot displays the 'Documents' application interface. On the left is a sidebar with search filters: Document Name, Description, Policy #, File Type (set to 'All'), Created By, and Date Created From/To. Below these are 'RESET' and 'SEARCH' buttons. The main area shows a table with 4 documents. A red arrow points to an 'UPLOAD' button in the top right corner. Below the table is a 'Document Details' section for a selected document, with a red arrow pointing to it labeled 'Preview Screen'. An 'OPEN' button is located at the bottom right of the details section. A disclaimer is visible at the bottom of the page.

| Document Name | Last Modified | Modified By | Policy Number |
|---------------------------|---------------|---------------|---------------|
| Application for Signature | 05/22/2019 | Robin Cordell | |
| Quote | 05/06/2019 | Robin Cordell | |
| Policy | 04/04/2019 | Admin Nexsure | |
| Endorsement | 04/04/2019 | Admin Nexsure | |

Document Details

| | | |
|-----------------------------|---------------|------------------------|
| DOCUMENT DESCRIPTION | DATE CREATED | ASSOCIATED POLICY LOGS |
| 18-19 Worker's Compensation | 04/04/2019 | |
| FILE NAME | CREATED BY | |
| SCI.pdf | Admin Nexsure | |

By using this site, you agree to be responsible for maintaining the confidentiality of your account and password and for restricting access to your computer, and accept responsibility for all activities that occur under your account or password.

Any questions or if you need to add or delete a user, please contact us at documents.wc@jencapgroup.com