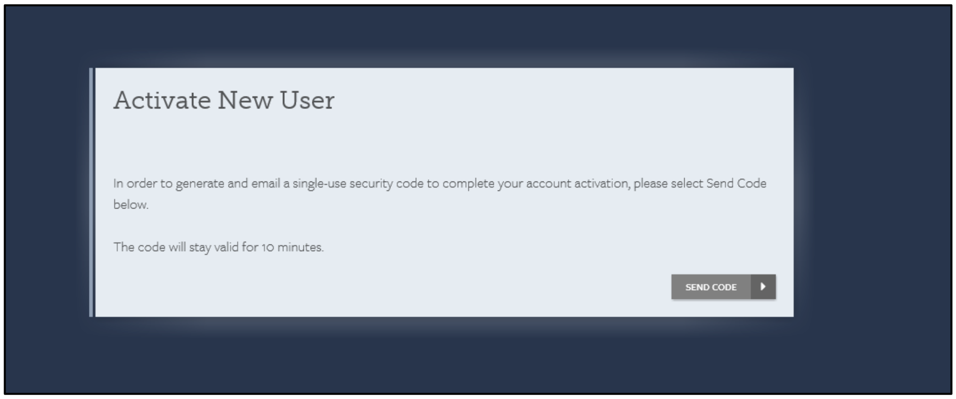
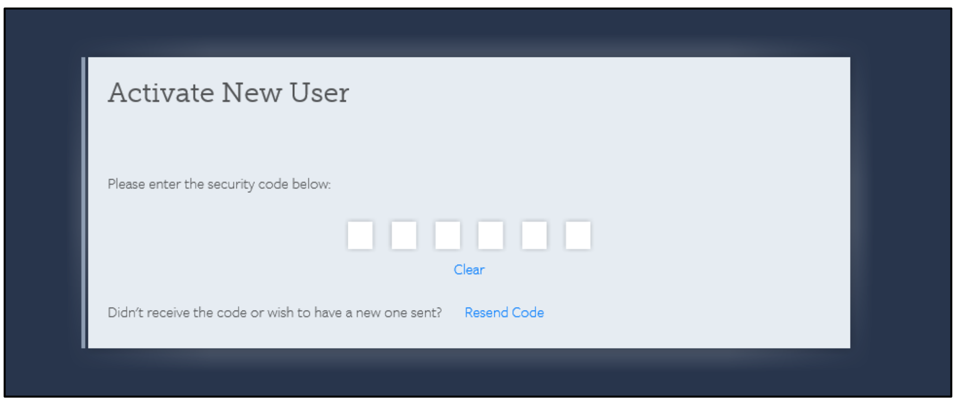
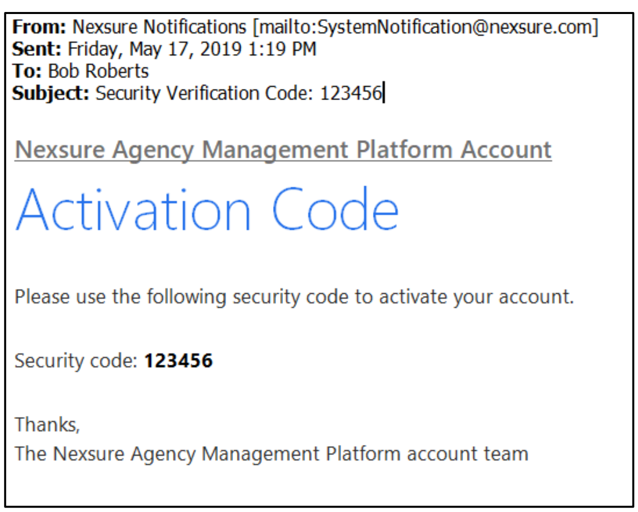
How To Activate Retail Agent Portal

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.



From: Nexsure Notifications [mailto:SystemNotification@nexsure.com]
Sent: Friday, May 17, 2019 1:19 PM
To: Bob Roberts
Subject: Security Verification Code: 123456

Nexsure Agency Management Platform Account

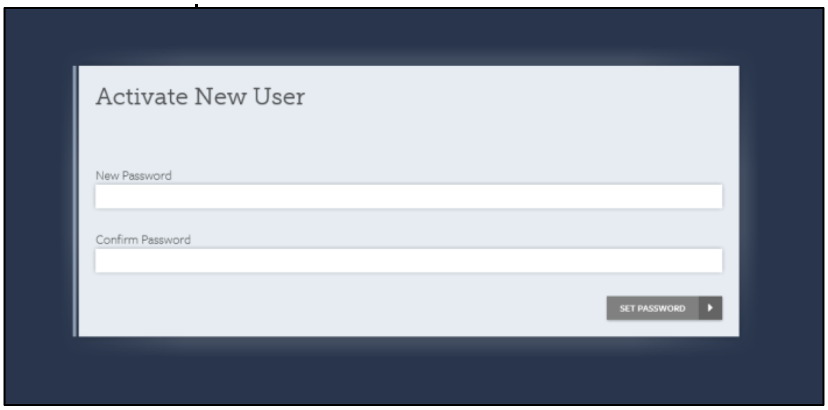
Activation Code

Please use the following security code to activate your account.

Security code: **123456**

Thanks,
The Nexsure Agency Management Platform account team

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.

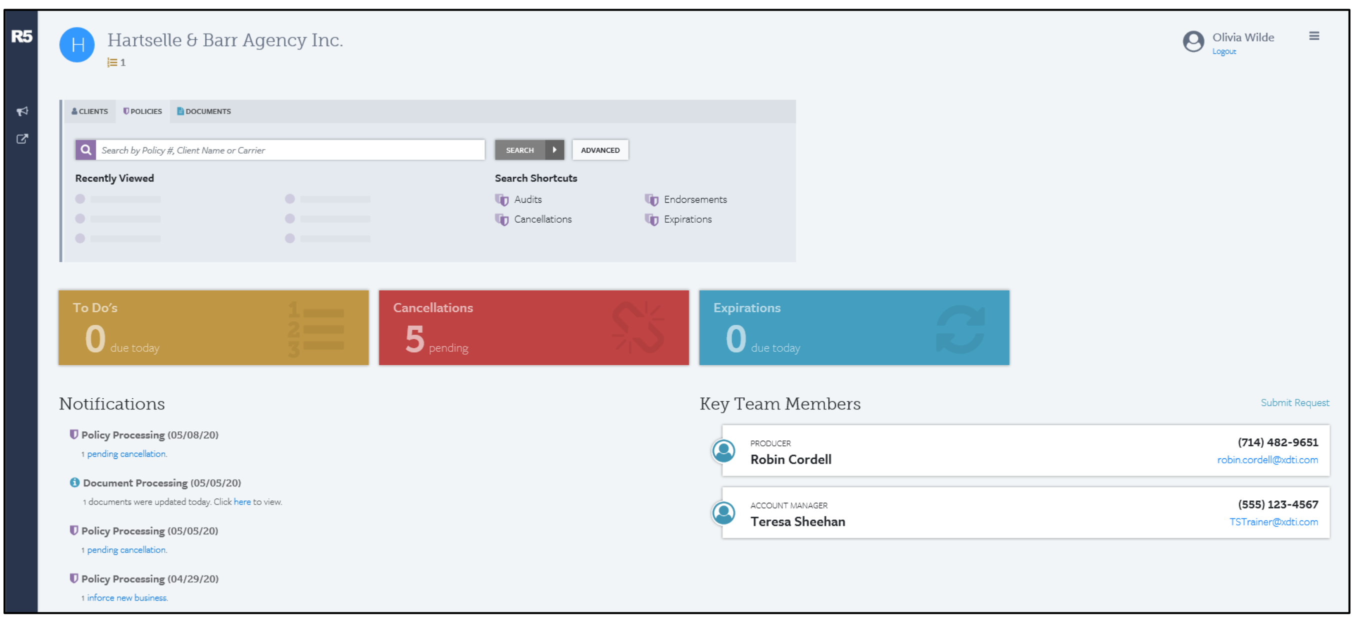


You are then taken to the login page with a message indicating your account has been activated, at which point you enter your username and password to login.

Agency Portal Guide

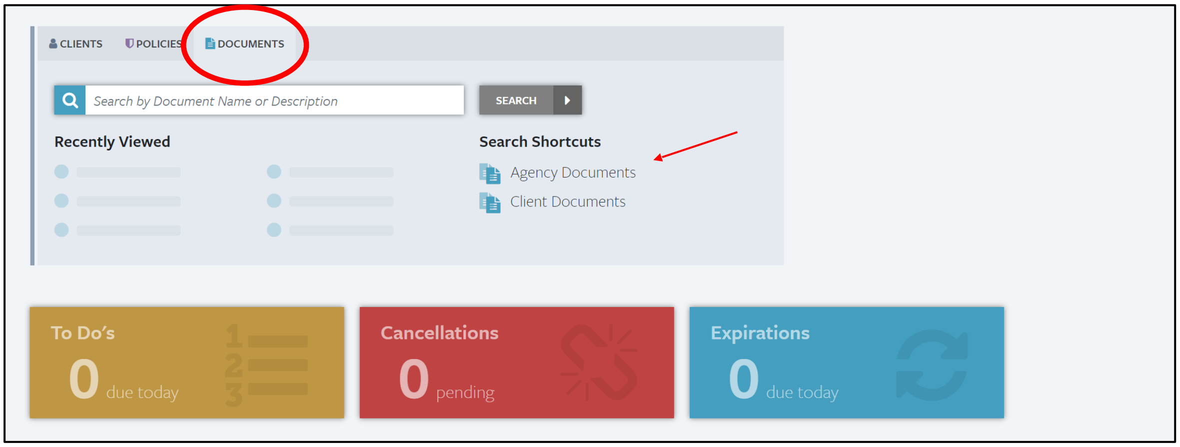
The agency portal gives you access to view your agency's policy documents; such as endorsements, policy renewal notifications, audits, pending cancellations, rescissions, commission statements, and upcoming expirations.

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**:

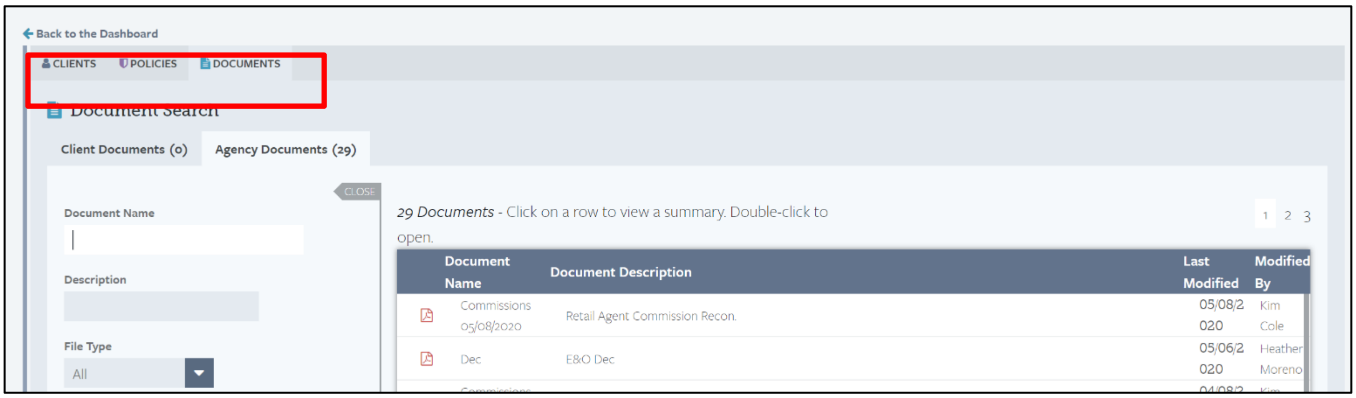


Commission Statements:

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

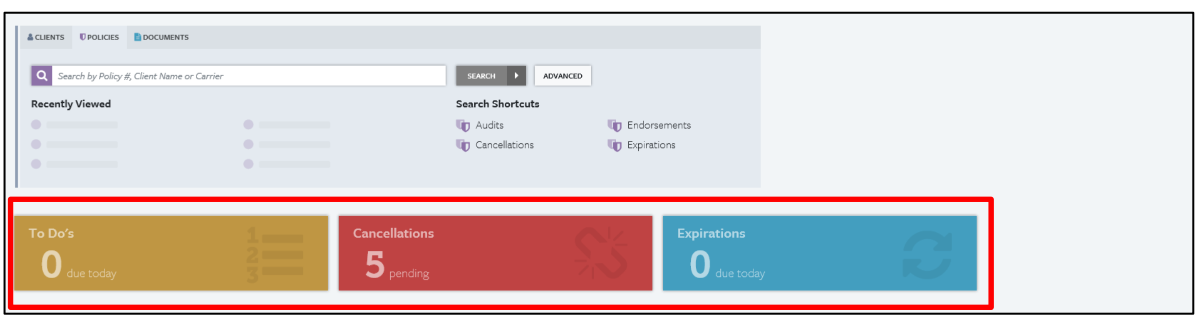


Clients, Policies and Documents:



- *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

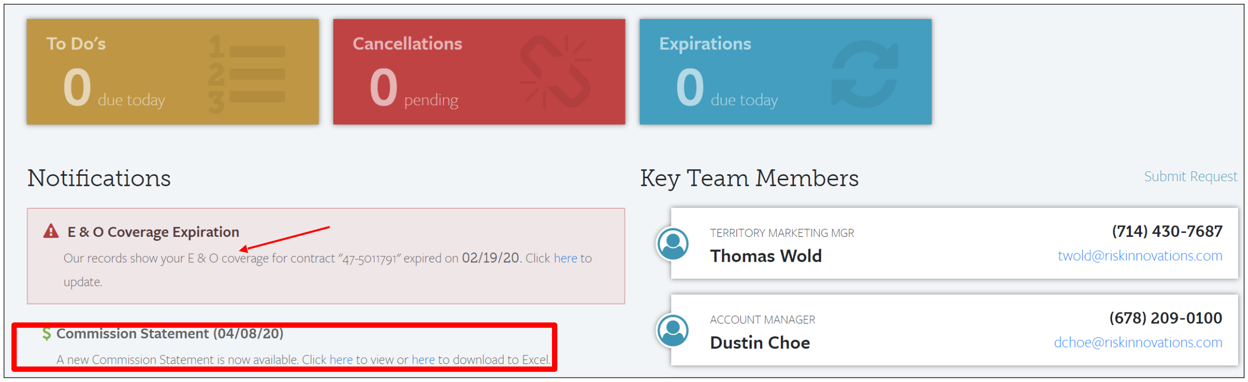
Retail Agent Live Tiles:



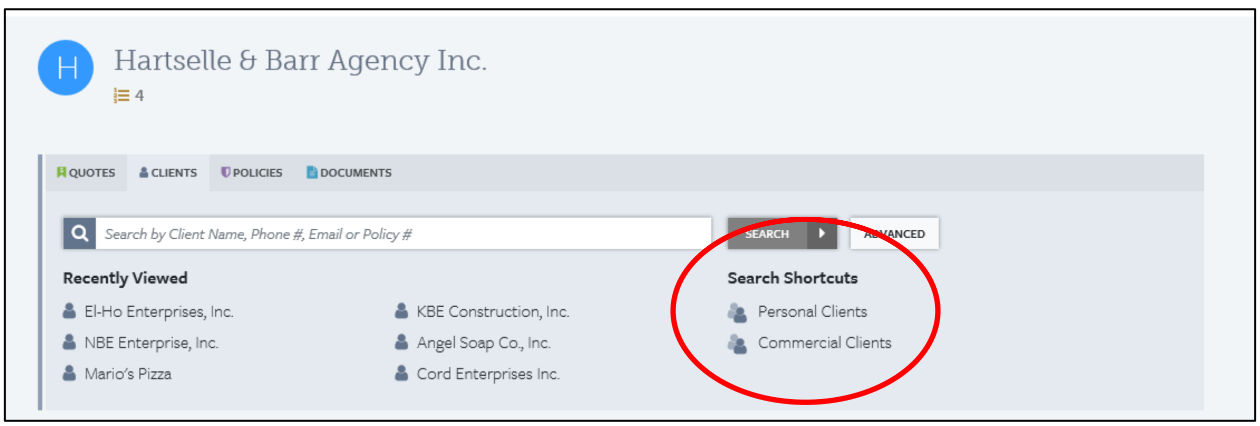
- To Do's: *This will be a future capability.*
- Cancellations: Shows all pending cancellations, as well as, cancelled and reinstated policies within the last month.
- Expirations: Shows upcoming policy renewals within 90 days.

<u>Notifications:</u>

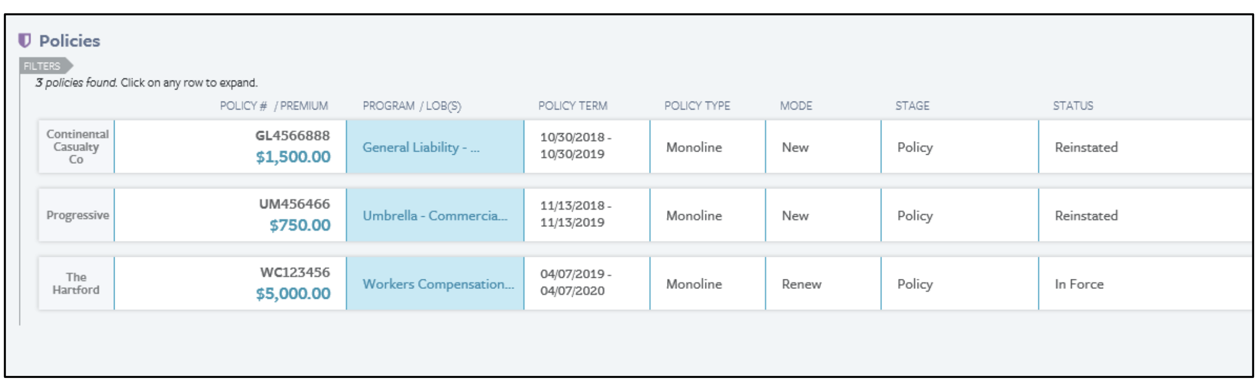
- Shows all recent activity; including cancellations, new documents available for viewing, new business, endorsements, commission statements, E&O coverage expiration, etc.
- Shows key team members assigned to your agency and their contact information:



<u>Client View</u>:
To view information for your Personal Lines or Commercial Client, you will click on the shortcuts on the main page**:**

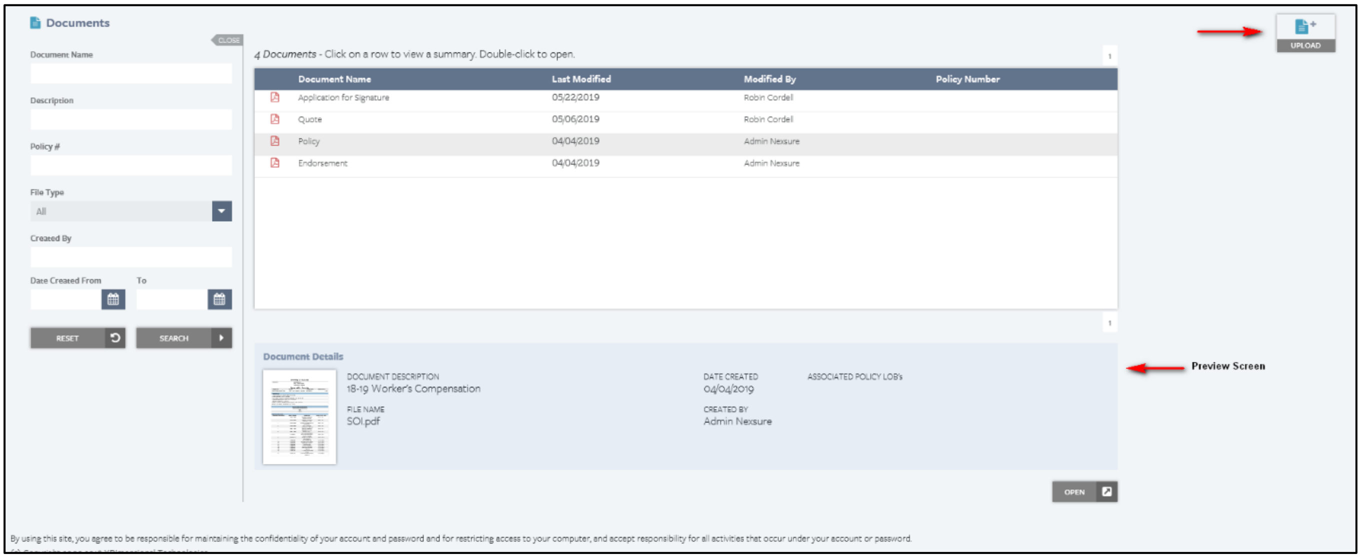


<u>Policies:</u>
Click on any row to expand the policy and view the summary of insurance details for that line of business.



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.



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