



CALIFORNIA MUTUAL INSURANCE COMPANY

AGENCY PORTAL – ADMINISTRATOR MANUAL

12/2024

ADMINISTRATOR FUNCTIONS

The following features are only available to an Administrator.

- **Assign an Administrator to your agency**
 - If you do not have an Administrator, email Mary Soliven msoliven@calmutual.com to assign Administrator type to an existing user or to add a new user with Administrator privileges.
- **Agency Accounts**
 - Account View – view commissions paid to your agency.
 - Commission Statements – view, print, or email commission statements.
 - Policy View – View commission activity by specific policy number.
- **Agency Users**
 - Add or close users
 - View user details and authorized products
 - Reset passwords for users
- **Agency Reports**
 - View and print reports



ADMINISTRATOR FUNCTIONS

Administrators will see several links available only to Administrators

- Add and Close Users – top right icon
- Quick Links – Agency Accounts – Commission Activity
- Quick Reports - Preview, print or email reports.
 - Active Agency Report – All active users to your agency.
 - Agency Experience Report – View your agencies premiums written and earned, losses and loss adjustment expenses incurred, loss ratios, and policy counts by line of business and comparable prior year data as of a specific date.
 - Inforce Policy Report – List of policies inforce for your agency with summary detail of the policy, filter options and sorting options.

The screenshot shows the SimpleINSPIRE administrator interface. The top navigation bar includes a search icon, a user icon with a plus sign, and a user profile for 'Cheri Test'. The main content area is divided into three sections: 'Diaries', 'Submissions', and 'Welcome to California Mutual Insurance Company!'. The 'Diaries' and 'Submissions' sections both show 'No Records found for the search criteria'. The left sidebar contains 'Express Navigation' with search filters, 'Quick Links' with a 'Full Menu' link, and 'Quick Reports' with a 'Full Menu' link. Red arrows point from the text labels to specific interface elements: 'Commission Activity' points to 'Agency Accounts' in the Quick Links section; 'Agency Reports' points to the 'Quick Reports' section header; and 'Add & Close Users' points to the user icon with a plus sign in the top right corner.

Express Navigation

Enter Value

Policy No

Policy Folder

GO

Submissions

Quick Links [Full Menu](#)

Agency Accounts

User Diary

Submissions

New Quote

Quick Reports [Full Menu](#)

Active Agency Report

Agency Experience Report

Inforce Policy Report

Diaries [My Diaries](#)

Scheduled From ContextID Description

No Records found for the search criteria

Submissions [Last 30 days](#)

Trans Created Dt. Policy No Insured Name Description

No Records found for the search criteria

Welcome to California Mutual Insurance Company!

Commission Activity

Agency Reports

Add & Close Users

ADMINISTRATOR FUNCTIONS

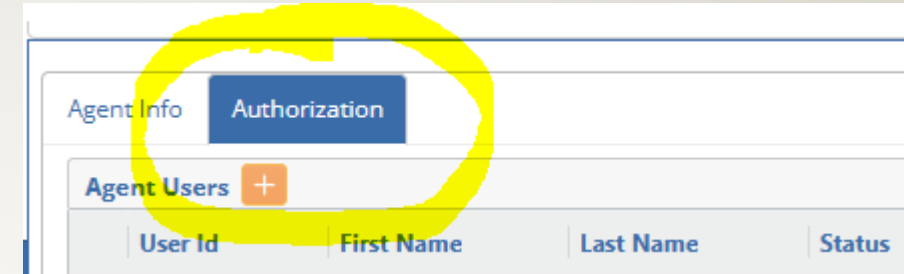
- **Agency Users** – Select icon top right
 - Select Agency ID – a list of your agencies will populate. (Fig. 1) If you are an administrator for more than one agency, select the agency.
 - A list of users will populate (Fig 2)
 - To modify users, select “Edit Users”
 - **Add** user by selecting the “+” (Fig 3)
 - Complete the details for the new user
 - User ID should be formatted as – FIRSTLAST name, all alpha, no spaces
 - User type drop down list – CSR, Producer or Administrator
 - MFA – choice of email or Microsoft Authenticator
 - MFA may be reset if MFA type is changed, or user did not setup in timely manner (Fig. 4)
 - To manually reset password, select (Fig. 5)
 - Enter License Info if any

The screenshot shows the SimpleINSPIRE Agent Maintenance interface. The top navigation bar includes the SimpleINSPIRE logo, a user profile icon for 'Cheri Test', and a 'VIEW' button. The main content area is divided into several sections:

- Agency ID Search:** Located at the top left, it includes a text input field for 'Agency Id', 'Go' and 'Clear' buttons, and an 'Edit Users' button. Red arrows point to these elements, with 'Fig. 1' labeling the Agency ID field.
- Agent Users Table:** A table with columns for 'User Id', 'First Name', 'Last Name', and 'Status'. It currently shows 'No Rows To Show'. A red arrow points to the '+' button in the top right corner of the table, labeled 'Fig. 3'.
- User Details Form:** A form on the right side with fields for 'FML', 'User Id', 'Email Id', 'Agent Type', 'Date Created', 'User Status', 'Status Date', and 'MFA Type'. A 'Reset' button is located below the 'MFA Type' field. Red arrows point to the 'User Id', 'Agent Type', 'MFA Type', and 'Reset' button, with 'Fig. 4' labeling the 'Reset' button.
- License Info Form:** A form at the bottom right with fields for 'State', 'Type', 'Lic#', and 'Expiry Date'. A '+' button is in the top right corner. A red arrow points to this '+' button, labeled 'Fig. 5'.
- Buttons:** 'Cancel' and 'Reset Password' buttons are located below the 'Reset' button. A red arrow points to the 'Reset Password' button, labeled 'Fig. 5'.

ADMINISTRATOR FUNCTIONS

- **Agency Users – Add User - Continued**
 - Select Next or “Authorization” to complete user products
 - Check box next to each product for user
 - Select NB Quote for Profile from drop down
 - Save and Close
 - The new user will receive an email to complete the registration, including password setup and reset password questions. Once complete the user can select “Forgot Password” to reset by answering their questions.
- **Agency Users – Close User**
 - To modify users, select “Edit Users”
 - Select specific user and change user status to “Closed”
 - Save and Close

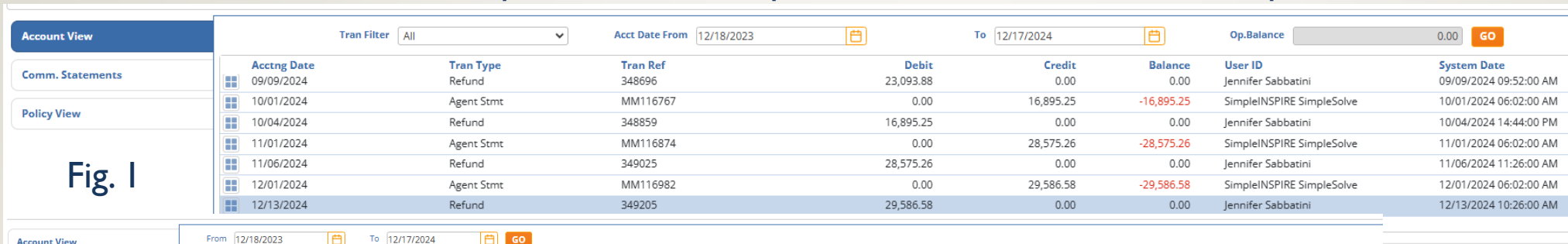


Authorized Products				
Issue Company	Policy Product	State	Profile	
<input checked="" type="checkbox"/> California Mutual Insurance Company	CPP-Motels	CA	NB Quote	▼
<input checked="" type="checkbox"/> California Mutual Insurance Company	CPP-Mercantile/Apts	CA	NB Quote	▼
<input checked="" type="checkbox"/> California Mutual Insurance Company	CPP-Bed N Breakfast	CA	NB Quote	▼

ADMINISTRATOR FUNCTIONS

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- **Agency Accounts** – Select Agency Accounts from Quick Links
 - Account View – List of transactions related to base commission activity and filters selected in header (Fig. 1)
 - Trans Type – Agent Stmt – Commission calculated
 - Trans Type – Refund is the Commission Paid; Trans Ref is the check number
 - Comm. Statements – List of commission statements and detail of policies associated with statement. (Fig. 2)
 - Left Click on Dice next to a statement to Print or Email the statement
 - Policy View - Enter a policy number – GO – Change Policy Term if necessary (Fig. 3)
 - Transactions will populate with Stmt Date that commission was paid on that specific policy.
 - Comm. Base is the premium amount paid; Comm % rate; Comm.Amt. paid.

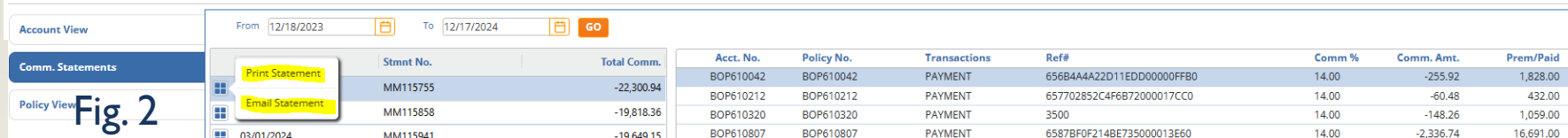


Account View

Tran Filter: All | Acct Date From: 12/18/2023 | To: 12/17/2024 | Op. Balance: 0.00 | GO

Acctg Date	Tran Type	Tran Ref	Debit	Credit	Balance	User ID	System Date
09/09/2024	Refund	348696	23,093.88	0.00	0.00	Jennifer Sabbatini	09/09/2024 09:52:00 AM
10/01/2024	Agent Stmt	MM116767	0.00	16,895.25	-16,895.25	SimpleINSPIRE SimpleSolve	10/01/2024 06:02:00 AM
10/04/2024	Refund	348859	16,895.25	0.00	0.00	Jennifer Sabbatini	10/04/2024 14:44:00 PM
11/01/2024	Agent Stmt	MM116874	0.00	28,575.26	-28,575.26	SimpleINSPIRE SimpleSolve	11/01/2024 06:02:00 AM
11/06/2024	Refund	349025	28,575.26	0.00	0.00	Jennifer Sabbatini	11/06/2024 11:26:00 AM
12/01/2024	Agent Stmt	MM116982	0.00	29,586.58	-29,586.58	SimpleINSPIRE SimpleSolve	12/01/2024 06:02:00 AM
12/13/2024	Refund	349205	29,586.58	0.00	0.00	Jennifer Sabbatini	12/13/2024 10:26:00 AM

Fig. 1

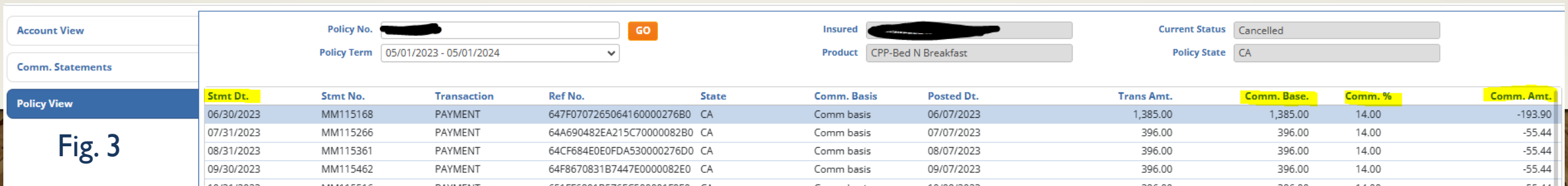


Account View

From: 12/18/2023 | To: 12/17/2024 | GO

Print Statement	Email Statement	Stmt No.	Total Comm.	Acct. No.	Policy No.	Transactions	Ref#	Comm %	Comm. Amt.	Prem/Paid
		MM115755	-22,300.94	BOP610042	BOP610042	PAYMENT	656B4A4A22D11EDD00000FFB0	14.00	-255.92	1,828.00
		MM115858	-19,818.36	BOP610212	BOP610212	PAYMENT	657702852C4F6872000017CC0	14.00	-60.48	432.00
		03/01/2024	MM115941	-19,649.15	BOP610320	PAYMENT	3500	14.00	-148.26	1,059.00
				BOP610807	BOP610807	PAYMENT	6587BF0F214BE735000013E60	14.00	-2,336.74	16,691.00

Fig. 2



Account View

Policy No.: [Redacted] | GO | Insured: [Redacted] | Current Status: Cancelled

Policy Term: 05/01/2023 - 05/01/2024 | Product: CPP-Bed N Breakfast | Policy State: CA

Stmt Dt.	Stmt No.	Transaction	Ref No.	State	Comm. Basis	Posted Dt.	Trans Amt.	Comm. Base.	Comm. %	Comm. Amt.
06/30/2023	MM115168	PAYMENT	647F0707265064160000276B0	CA	Comm basis	06/07/2023	1,385.00	1,385.00	14.00	-193.90
07/31/2023	MM115266	PAYMENT	64A690482EA215C70000082B0	CA	Comm basis	07/07/2023	396.00	396.00	14.00	-55.44
08/31/2023	MM115361	PAYMENT	64CF684E0E0FDA530000276D0	CA	Comm basis	08/07/2023	396.00	396.00	14.00	-55.44
09/30/2023	MM115462	PAYMENT	64F8670831B7447E0000082E0	CA	Comm basis	09/07/2023	396.00	396.00	14.00	-55.44
10/31/2023	MM115516	PAYMENT	651FE6801B5765C500001E9E0	CA	Comm basis	10/09/2023	396.00	396.00	14.00	-55.44

Fig. 3

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- **Active Agency Report** – Includes Agency Data and lists all active users in your agency (Fig. 1)

- Enter “As of Date”
- Chose to Generate in Excel format or PDF
- Agency Experience Report – Includes premiums written/earned, loss/LAE incurred, loss ratio, policy counts, by line of business
- Inforce Policy Report – lists all active policies as of date; several sort features; detail or summary. (Fig 3)

Line of Business	Premium Written	Ino/Dec Prior Year	Premium Earned	Losses Incurred	EP/LI Current Year	EP/LI Prior Year	Current Inforce Count	12/31 Inforce Count	Y-T-D Change	Change from prior Month	New in Month
Commercial											
BOP (Offices)	64,409.00	90.09%	33,035.00	0.00	0.00%	0.00%	9	4	5	0	0
BOP Apts/Condo	393,931.00	86.49%	293,973.00	(941.00)	(0.32%)	1.41%	33	29	4	1	1
CPP - Claims Only	0.00	0.00%	0.00	0.00	0.00%	0.00%	0	0	0	0	0
CPP - Snack and Beverage	0.00	0.00%	0.00	0.00	0.00%	0.00%	0	0	0	0	0
CPP- Contract Consultant	0.00	0.00%	0.00	0.00	0.00%	0.00%	0	0	0	0	0
CPP-Apartments	0.00	0.00%	0.00	0.00	0.00%	0.00%	0	0	0	0	0
CPP-Bed N Breakfast	84,949.00	(65.40%)	170,436.00	43,014.00	25.24%	13.76%	17	32	(15)	(2)	0
CPP-Condos	0.00	0.00%	0.00	0.00	0.00%	0.00%	0	0	0	0	0
CPP-Maids	0.00	0.00%	0.00	0.00	0.00%	0.00%	0	0	0	0	0
CPP-Mercantile/Apts	367,215.00	5.25%	357,672.00	2,176.00	0.61%	5.59%	44	44	0	0	1
CPP-Motels	609,857.00	48.92%	462,516.00	110,090.00	23.80%	13.26%	44	43	1	1	1
Farmowners	0.00	0.00%	0.00	0.00	0.00%	0.00%	0	0	0	0	0
Total Commercial:	1,520,361.00	21.72%	1,317,632.00	154,339.00	11.71%	9.99%	147	152	(5)	0	3
Personal											
DF - SS	47,867.00	12.10%	52,807.00	0.00	0.00%	0.00%	30	35	(5)	0	0
HO - SS	64,495.00	(26.26%)	79,162.00	5,555.00	7.02%	99.27%	35	47	(12)	(1)	0
Total Personal:	112,362.00	(13.67%)	131,969.00	5,555.00	4.21%	67.45%	65	82	(17)	(1)	0
Y-T-D 11/30/2024	1,632,723.00	18.38%	1,449,601.00	159,894.00	11.03%	15.98%	212	234	(22)	(1)	3
Y-T-D 11/30/2023	1,379,190.00		1,235,208.00	197,378.00			234				
Y-T-D Change	253,533.00	18.38%	214,393.00	(37,484.00)			(22)	234	(22)	(1)	3