



November 15, 2024

Agency Portal Features

Cal Mutual has expanded **Agency Portal Tools** to support Agency Administrators.

1. Assign an **Administrator** to your Agency. The Administrator will have access to the following:
 - a. **Agency Accounts**
 - i. Account View – View commission activity
 - ii. Commission Statements – View, Print, and Email commission statements
 - iii. Policy View – Look up a policy number and view when commission was posted and paid.
 - b. **Agency Users**
 - i. Add and close users
 - ii. View User Details
 - iii. Reset Passwords

Agency Portal – Administrator Manual

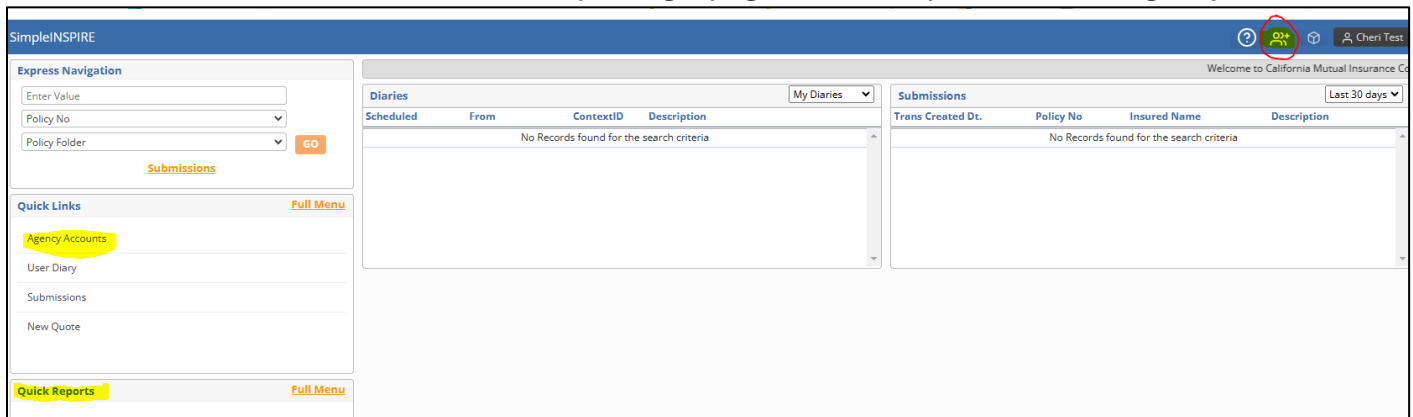
To access the Administrator features a designated person within your agency must be assigned as an Administrator as an Agent Type.

Once assigned, you will now have additional functions available to only Administrators. Administrators have the option of being assigned to more than one agency.

Contact Cal Mutual for assistance in assigning an Administrator to your agency(ies), by emailing Mary Soliven – msoliven@calmutual.com .

Administrator Login

- Login with User ID and Password – MFA will be by Authenticator App or Email
 - Home Screen for Administrators
- **Quick Links and User Icon**
 - Quick Links - Agency Accounts – Commissions
 - Administrator User Icon – top of login page – click to open access to Agency Accounts.



- **Administrator – Add/close users**
 - Click on the Administrator User Icon at the top right of the page.
 - Click on the Agency Id at the top left and the list of agencies will populate. Select Agency ID and the Agency Maintenance will open. (If you Administer more than one agency, all authorized agencies will populate - select Agency)
 - **To add a user**, select the + sign to the right of Agent Users Column.
 - Enter the detail for the user, including:
 - Name
 - User ID – (firstlast name – no spaces) i.e if name is Jane Doe, user will be JANEDOE
 - Email Address
 - Agent Type from drop down list
 - MFA Type – Multi Factor Identifier can be Microsoft Authenticator or Email Address
 - License Information, if licensed
 - Enter Authorization Products by selecting “Authorization” to the right of Agent Info header

- Select Authorized Products for user – NB
- Save and Close – user will receive an email to complete the registration
- **To Close a User**, select the user and in the User Details, change the User Status to “Closed”.

The screenshot displays the 'Agency Users' management interface. On the left, there is a sidebar with 'Upload Logo' and 'Agency Users' buttons. The main area is divided into 'Agent Info' and 'Authorization' tabs. Below these is a table of 'Agent Users' with columns for User Id, First Name, Last Name, and Status. One user, 'CHERITEST' (Cheri Test), is listed with an 'ACTIVE' status. Below the table is the 'User Details' form for the selected user. This form includes fields for FML (Cheri), User Id (CHERITEST), Agent Type (Administrator), User Status (Active), MFA Type (Email Authentication), Email Id (bcschmidt945@gmail.com), Date Created (06/07/2023), Status Date (12/12/2024), and Current Status (Completed). There are 'Reset', 'Cancel', and 'Reset Password' buttons at the bottom of the form. At the very bottom, there is a 'License Info' section with a table header for State, Type, Lic#, and Expiry Date.

• Agency Accounts

- Click on Agency ID and select Agency – Go you may have more than one if you are assigned to more than one agency.
- Account View will populate with Commission Activity based upon filters
 - Agency Statements – date, reference number, credit amount and account balance.
 - Refund – date, check number, debit amount and account balance.
- Comm Statements
 - The default filter date is one year from the current date. Update filter as needed.
 - The left window lists the commission statements by statement date.
 - Select commission statement and right window will populate with policy transactions within the statement.
 - Click on the dice next to statement date to open options to print the statement or email the statement.

SimpleINSPIRE

Agency Accounts

Agency ID: [Redacted] Go Clear Name: [Redacted] Edit Agency

Account View

From: 10/16/2023 To: 10/15/2024 GO

Account View	Stmnt Dt	Stmnt No.	Total Comm.	Acct. No.	Policy No.	Transactions	Ref#	Comm %	Comm. Amt.	Prem/Paid
Comm. Statements	10/15/2023	MM112310	-11,100.42	BOP610042	BOP610042	PAYMENT	66D5D4901BA86F8E00002F3A0	14.00	-188.58	1,347.00
Policy View	11/30/2023	MM115606	-12,811.96	BOP610685	BOP610685	PAYMENT	4337	14.00	-78.40	560.00
	11/30/2023	MM115703	-1,647.36	BOP610979	BOP610979	PAYMENT	66D743B61167E41C000013E20	14.00	-2,479.68	17,712.00
	12/31/2023	MM115755	-22,300.94	BOP610988	BOP610988	PAYMENT	66F038EA23CC0FC00001F9C0	14.00	-781.76	5,584.00
	01/31/2024	MM115858	-19,818.36	BOP611211	BOP611211	PAYMENT	66E9953B360416E400000C160	14.00	-58.10	415.00
	03/01/2024	MM115941	-19,649.15	BOP611607	BOP611607	PAYMENT	66DAEEEB0D211A8400002F3C0	17.00	-70.72	416.00
	04/01/2024	MM116048	-24,543.71	BOP611641	BOP611641	PAYMENT	5617	17.00	-663.51	3,903.00
	05/01/2024	MM116246	-15,855.22	BOP611966	BOP611966	PAYMENT	9461	17.00	-946.90	5,570.00
	06/01/2024	MM116344	-18,210.77	CP2290017	CP2290017	PAYMENT	66F2A24005094252000023860	14.00	-149.24	1,066.00
	06/30/2024	MM116447	-20,308.96	CP2290159	CP2290159	PAYMENT	2723	14.00	-607.18	4,337.00
	07/31/2024	MM116553	-25,214.41	CP2290280	CP2290280	PAYMENT	4765	14.00	-50.68	362.00
		MM116656	-23,093.88	CP2290280	CP2290280	PAYMENT	66E6A12806610DE90000276A0	14.00	-318.36	2,274.00
		MM116767	-16,895.25	CP2290321	CP2290321	PAYMENT	66E9697C0BA72FAE000004450	14.00	-90.30	645.00
				CP2290348	CP2290348	PAYMENT	66D59AD70C13FC16000023830	14.00	-154.42	1,103.00
				CP22903619	CP22903619	PAYMENT	66F235243AE4C40B0000276B0	14.00	-54.74	391.00
				CP22903623	CP22903623	PAYMENT	66EABC900CFA8CB7000004430	14.00	-226.24	1,616.00
				CP22904354	CP22904354	PAYMENT	66F548713A823C2D00002B520	14.00	-45.36	324.00
				CP22904637	CP22904637	PAYMENT	66ED743411B3B1E50000276B0	14.00	-76.30	545.00
				CP22904738	CP22904738	PAYMENT	66D6215D3120E67100001B820	14.00	-261.66	1,869.00
				CP22905184	CP22905184	PAYMENT	66D2135A2533DFAA00002F3C0	14.00	-280.00	2,000.00
				CP22905184	CP22905184	PAYMENT	66F8AE4F0925D105000023840	14.00	-23.38	167.00
				CP22905204	CP22905204	PAYMENT	1231	14.00	-399.84	2,856.00

Print Statement
Email Statement

- Policy View – to view commission activity on a specific policy number, enter the policy number, select GO, and detail will appear providing the detailed payments on the policy, including insured commission payment dates, commission base, commission percentage and commission paid.