



Agency Administrator Portal Features:

November 17, 2025

Cal Mutual has expanded Agency Portal Tools to support our valued agencies.

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

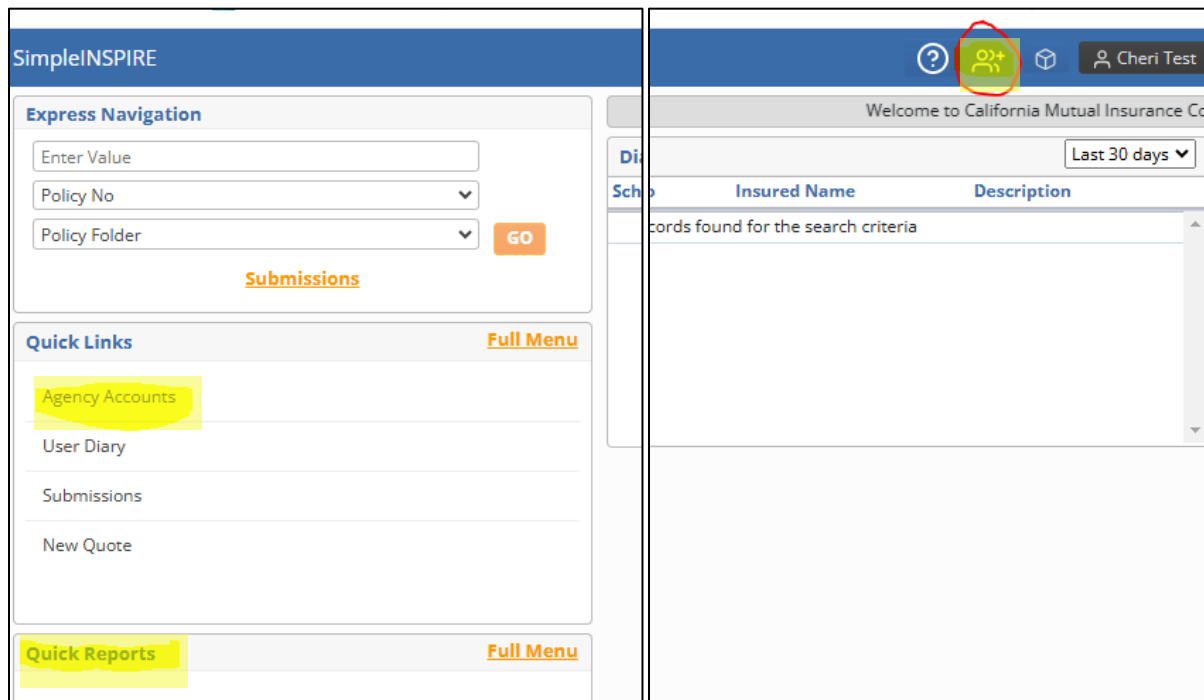
To access the Administrator features, a designated person within your agency must be assigned as an Administrator as an Agent type

Once you have been assigned, you will now have additional functions available only to 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) or our front desk (frontdesk@calmutual.com)

Administrator Login:

- Login with User ID and Password – MFA will be by Authenticator App or Email
 - Home screen for Administrators
- **New Quick Links and User Icon**
 - Quick Links – Agency Accounts – Commissions
 - Administrator User Icon – located at top right 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 details for the user, including:
 - Name
 - User ID – (FIRSTNAMELASTNAME – no spaces)
 - 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 'Administrator' interface for managing users. On the left, there's a sidebar with 'Upload Logo' and 'Agency Users'. The main area is divided into 'Agent Info' and 'Authorization' tabs. Under 'Agent Info', there's a table of 'Agent Users' with columns: User Id, First Name, Last Name, and Status. One user is listed: 'CHERITEST' with first name 'Cheri' and last name 'Test', status 'ACTIVE'. Below the table is the 'User Details' form for the selected user. The form includes fields for FMI (Cheri), User Id (CHERITEST), Agent Type (Administrator), User Status (Active), Email Id (bcschmidt945@gmail.com), Date Created (06/07/2023), Status Date (12/12/2024), MFA Type (Email Authentication), and Current Status (Completed). There are 'Reset', 'Cancel', and 'Reset Password' buttons. At the bottom, there's a 'License Info' section with a table for State, Type, Lic#, and Expiry Date.

State	Type	Lic#	Expiry Date
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Agency Accounts

The screenshot shows the SimpleINSPIRE web application interface. At the top is a blue header with the text "SimpleINSPIRE". Below the header is a section titled "Express Navigation" which contains a text input field labeled "Enter Value", a dropdown menu labeled "Policy No", another dropdown menu labeled "Policy Folder", and an orange "GO" button. Below this section is a link labeled "Submissions". Further down is a section titled "Quick Links" with a link labeled "Full Menu" to its right. The "Quick Links" section contains four items: "Agency Accounts" (highlighted in yellow), "User Diary", "Submissions", and "New Quote". At the bottom of the "Quick Links" section is another link labeled "Quick Reports" (highlighted in yellow) with a "Full Menu" link to its right.

If you do not see Agency Accounts as an option under "Quick Links" be sure to click on Full Menu on the right to expand the options and select Agency Accounts from there and then you can follow the steps in the tutorial.

This is a close-up screenshot of the "Quick Links" section. It shows a button labeled "Quick Links" and a button labeled "Full Menu" which is highlighted with a blue rectangular border.

- 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.
- Commission 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 menu next to Statement Date to open options to print the statement or email the statement.

SimpleINSPIRE

Agency Accounts

Agency Id: [REDACTED] Go Clear

Account View

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

Comm. Statements

Stmnt Dt	Stmnt No.	Total Comm.
10/31/2023	MM115210	-11,100.43
11/30/2023	MM115606	-12,811.96
11/30/2023	MM115703	-1,647.36
12/31/2023	MM115755	-22,300.94
01/31/2024	MM115858	-19,818.36
03/01/2024	MM115941	-19,649.15
04/01/2024	MM116048	-24,543.71
05/01/2024	MM116246	-15,855.22
06/01/2024	MM116344	-18,210.77
06/30/2024	MM116447	-20,308.96
07/31/2024	MM116553	-25,214.41
	MM116656	-23,093.88
	MM116767	-16,895.25

Print Statement

Email Statement

SimpleINSPIRE

Agency Accounts

Agency Id: [REDACTED] Go Clear Name: [REDACTED] Edit Agency

Account View

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

Comm. Statements

Stmnt Dt	Stmnt No.	Total Comm.
10/31/2023	MM115210	-11,100.43
11/30/2023	MM115606	-12,811.96
11/30/2023	MM115703	-1,647.36
12/31/2023	MM115755	-22,300.94
01/31/2024	MM115858	-19,818.36
03/01/2024	MM115941	-19,649.15
04/01/2024	MM116048	-24,543.71
05/01/2024	MM116246	-15,855.22
06/01/2024	MM116344	-18,210.77
06/30/2024	MM116447	-20,308.96
07/31/2024	MM116553	-25,214.41
	MM116656	-23,093.88
	MM116767	-16,895.25

Print Statement

Email Statement

Acct. No.	Policy No.	Transactions	Ref#	Comm %	Comm. Amt.	Prem/Paid
BOP610042	BOP610042	PAYMENT	66D5D4901BA86F8E00002F3A0	14.00	-188.58	1,347.00
BOP610685	BOP610685	PAYMENT	4337	14.00	-78.40	560.00
BOP610979	BOP610979	PAYMENT	66D743B61167E41C000013E20	14.00	-2,479.68	17,712.00
BOP610988	BOP610988	PAYMENT	66F038EA23CC0FC00001F9C0	14.00	-781.76	5,584.00
BOP611211	BOP611211	PAYMENT	66E9953B360416E400000C160	14.00	-58.10	415.00
BOP611607	BOP611607	PAYMENT	66DAEEEB0D211A8400002F3C0	17.00	-70.72	416.00
BOP611641	BOP611641	PAYMENT	5617	17.00	-663.51	3,903.00
BOP611966	BOP611966	PAYMENT	9461	17.00	-946.90	5,570.00
CPP290017	CPP290017	PAYMENT	66F2A24005094252000023860	14.00	-149.24	1,066.00
CPP290159	CPP290159	PAYMENT	2723	14.00	-607.18	4,337.00
CPP290280	CPP290280	PAYMENT	4765	14.00	-50.68	362.00
CPP602315	CPP602315	PAYMENT	66EA612806610DE90000276A0	14.00	-318.36	2,274.00
CPP602321	CPP602321	PAYMENT	66E9697C0BA72FAE000004450	14.00	-90.30	645.00
CPP602348	CPP602348	PAYMENT	66D59AD70C13FC16000023830	14.00	-154.42	1,103.00
CPP603619	CPP603619	PAYMENT	66F235243AE4C40B0000276B0	14.00	-54.74	391.00
CPP603623	CPP603623	PAYMENT	66EABC900CFACB7000004430	14.00	-226.24	1,616.00
CPP604354	CPP604354	PAYMENT	66F548713A823C2D000002B520	14.00	-45.36	324.00
CPP604637	CPP604637	PAYMENT	66ED743411B3B1E50000276B0	14.00	-76.30	545.00
CPP604738	CPP604738	PAYMENT	66D6215D3120E67100001B820	14.00	-261.66	1,869.00
CPP605184	CPP605184	PAYMENT	66D2135A253DFAA00002F3C0	14.00	-280.00	2,000.00
CPP605184	CPP605184	PAYMENT	66F8AB4F0925D105000023840	14.00	-23.38	167.00
CPP605204	CPP605204	PAYMENT	1231	14.00	-399.84	2,856.00

- 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.