

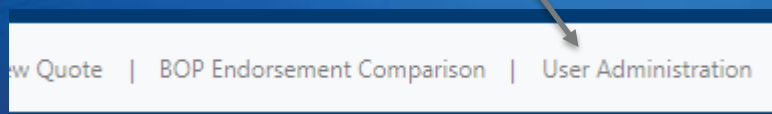
**AmeriTrust BOP Portal
System Training Documentation
Agent Administration**



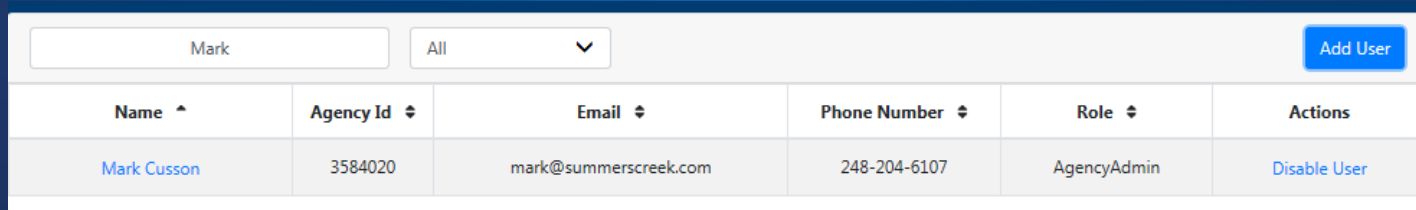
User Administration

Those users within an agency with special permissions will be able to create and maintain their agencies' users.

Click "User Administration" in the main navigation bar.



This will list all of the users for the agency you are administrator.

A screenshot of the 'User Administration' interface. At the top, there is a search box containing 'Mark' and a dropdown menu set to 'All'. To the right is a blue 'Add User' button. Below this is a table with columns: Name, Agency Id, Email, Phone Number, Role, and Actions. One user is listed: Mark Cusson, Agency Id 3584020, Email mark@summerscreek.com, Phone Number 248-204-6107, Role AgencyAdmin, and Action Disable User.

Name ^	Agency Id ⇅	Email ⇅	Phone Number ⇅	Role ⇅	Actions
Mark Cusson	3584020	mark@summerscreek.com	248-204-6107	AgencyAdmin	Disable User

- **Name** – First Name and Last Name
- **Agency ID** – This is the unique agency number AmeriTrust has appointed your agency.
- **Email** – Email address of the user, this also serves as the users login id
- **Phone Number** – Phone number of the user
- **Role** – This will be either "AgencyAdmin" or "AgencyUser" based on permission level.

User Admin - Edit User

As agency administrator you have permission to edit certain fields on your users.

Name ^	Agency Id	Email	Phone Number	Role	Actions
Mark Cusson	3584020	mark@summerscreek.com	248-204-6107	AgencyAdmin	Disable User

Click on the name of the user. This will open a window to edit fields.

Edit User

Agency: MEADOWBROOK, INC (3584020)

Role: Admin

First Name *
Mark

Last Name *
Cusson

Email Address
mark@summerscreek.com

Phone Number *
248-204-6107

Close Save

Fields that are greyed out can not be modified. If you do need to change the role from Admin to User or User to Admin please contact the main support line for assistance.

Click Save after changes are completed.

Agent Admin - Disable/Enable User

As agency administrator you have permission to disable or re-enable users.

Name ^	Agency Id ⇅	Email ⇅	Phone Number ⇅	Role ⇅	Actions
Mark Cusson	3584020	mark@summerscreek.com	248-204-6107	AgencyAdmin	Disable User

If a user is currently active, click the “Disable User” Action. You will get a confirmation warning, click Confirm to continue.

Are you sure? ×

You are about to disable the account for Mark Cusson.

Actions

Enable User

“Enable User” works the identical way. This is how you will remove access once it is created. Please note that any quotes created by a disabled user are still accessible by anyone under your agency code.

Agent Admin - Add User

As agency administrator you have permission to create new users.

Name ^	Agency Id ⇅	Email ⇅	Phone Number ⇅	Role ⇅	Actions
Mark Cusson	3584020	mark@summerscreek.com	248-204-6107	AgencyAdmin	Disable User

Add User

New User

Agency *
MEADOWBROOK, INC (3584020)

Role *
User

First Name *

Last Name *

Email Address *

Phone Number *

Close Submit

Click on "Add User" button. This will open a new window. Please note that if you want to setup an additional Agent Admin, please contact our support line.

Once finished, click on the "Submit" button. This will email the new user with their login information and also provide a link to the portal.