Agent Center Administration Tips

Administrator’s Authority

You have the authority to add, update and remove users in your office. When you add users, you give them authority to the functions on Agent Center which are needed for their jobs.

Administrators must have access to a function to grant access to that function for another user. If the authority is changed for one administrator, it changes for all administrators and users in your agency.

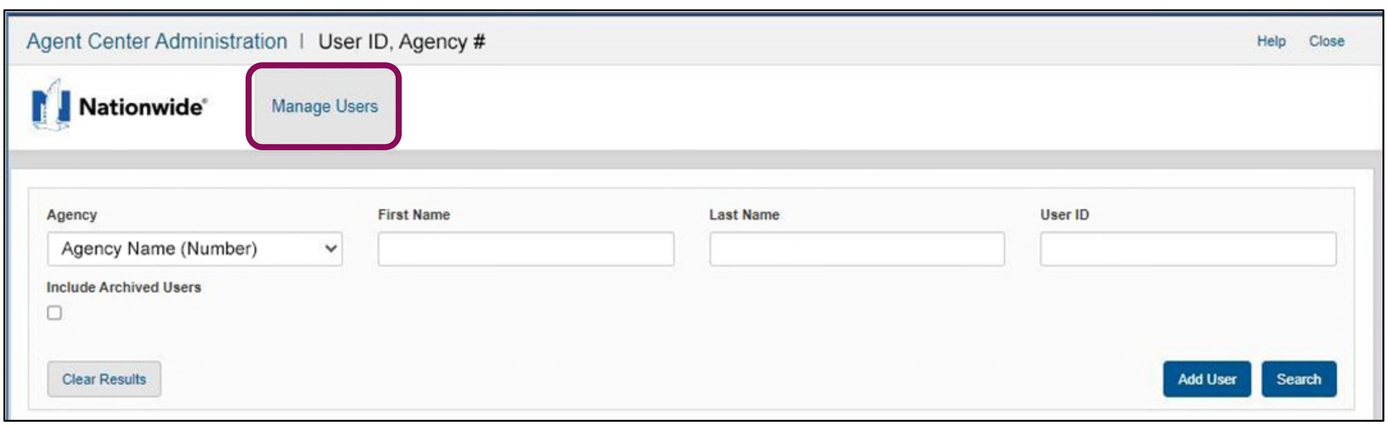
It is recommended that your agency always have two administrators.

Add Administrator

To request new/additional administrators:

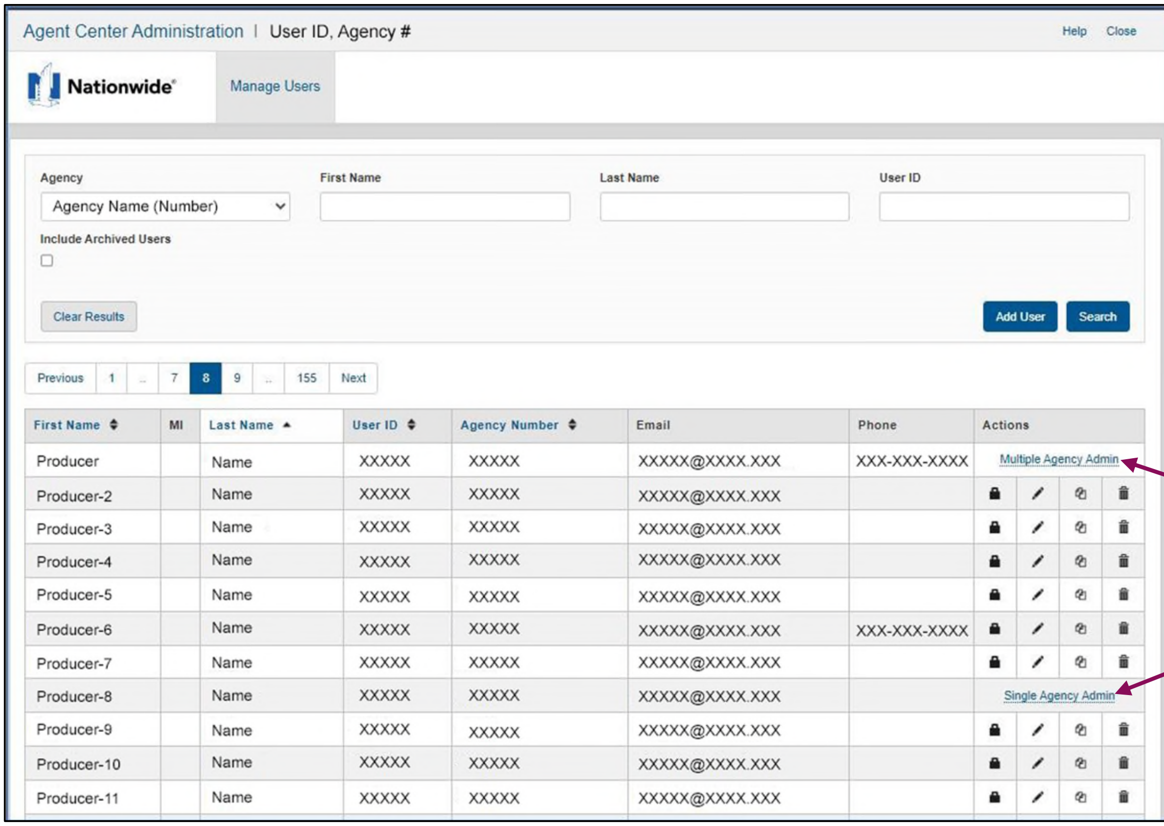
1. The individual must have an active Agent Center User ID.
2. Contact the IT Service Desk - access can only be requested by current administrator, agency owner/principal, or your sales manager.
3. Provide the following information so the new administrator's identity can be verified:
   - First and Last name
   - Email address
   - Agency Number

Manage Users



The “Manage Users” tab automatically displays when accessing Agent Center Administration. Select “Search” to display a list of all your agency’s users who have authority to sign into Agent Center.

Manage Users (cont'd)



Agent Center Administration | User ID, Agency #   Help Close

Nationwide® Manage Users

Agency: Agency Name (Number) | First Name | Last Name | User ID

Include Archived Users

Clear Results   Add User   Search

Previous 1 .. 7 8 9 .. 155 Next

First Name	MI	Last Name	User ID	Agency Number	Email	Phone	Actions
Producer		Name	XXXXX	XXXXX	XXXXX@XXXX.XXX	XXX-XXX-XXXX	Multiple Agency Admin
Producer-2		Name	XXXXX	XXXXX	XXXXX@XXXX.XXX		
Producer-3		Name	XXXXX	XXXXX	XXXXX@XXXX.XXX		
Producer-4		Name	XXXXX	XXXXX	XXXXX@XXXX.XXX		
Producer-5		Name	XXXXX	XXXXX	XXXXX@XXXX.XXX		
Producer-6		Name	XXXXX	XXXXX	XXXXX@XXXX.XXX	XXX-XXX-XXXX	
Producer-7		Name	XXXXX	XXXXX	XXXXX@XXXX.XXX		
Producer-8		Name	XXXXX	XXXXX	XXXXX@XXXX.XXX		Single Agency Admin
Producer-9		Name	XXXXX	XXXXX	XXXXX@XXXX.XXX		
Producer-10		Name	XXXXX	XXXXX	XXXXX@XXXX.XXX		
Producer-11		Name	XXXXX	XXXXX	XXXXX@XXXX.XXX		

"Admin" displays as a designation for you and other agency administrators. You cannot edit producers who have admin rights.

As an administrator, you will maintain this list and the information available. The list is sortable by first or last name, User ID, or Agency Number.

- "First Name/MI/Last Name" displays existing users in alphabetical order based on last name.
- "User ID" displays the assigned Agent Center User ID.
- "Agency Number" displays the agent number the user is associated with.
- "Email" displays the email address associated with the user in the system.
- "Phone" displays the phone number associated with the user in the system.
- "Actions"

Access – Select the lock icon from the "Actions" column. Review the user's access as needed to assist them with any concerns they may have regarding access to the Agent Center. You can assist them with Identity Authentication activity, Password Reset activity, and Login Failure history.

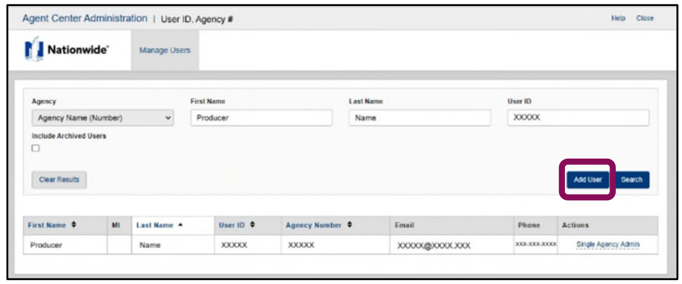
Edit – Select the pencil icon (edit icon) from the actions column and make changes to the user's information as necessary. After updating the data, select the 'Submit' button. A name change for a Transition agency user may require additional fields to be completed before final submission. A confirmation message displays on the screen indicating the ID was successfully updated and the user information displays.

Copy – Select the page icon to copy all the data for a user so it may be duplicated in order to create a new user with the same settings.

Delete –Select the trash can icon from the Actions column. A message or modal displays to advise of any additional information needed to complete the user deletion process. If you select 'Delete' or 'Submit' the process continues and a successful deletion message displays on the screen. The delete function removes this user from your list and prevents them from having authority on the Agent Center.

Add User

Step 1

Action	Screen
On the “Manage Users” page, select the “Add User” button to open a blank “Add User” template.	

Step 2

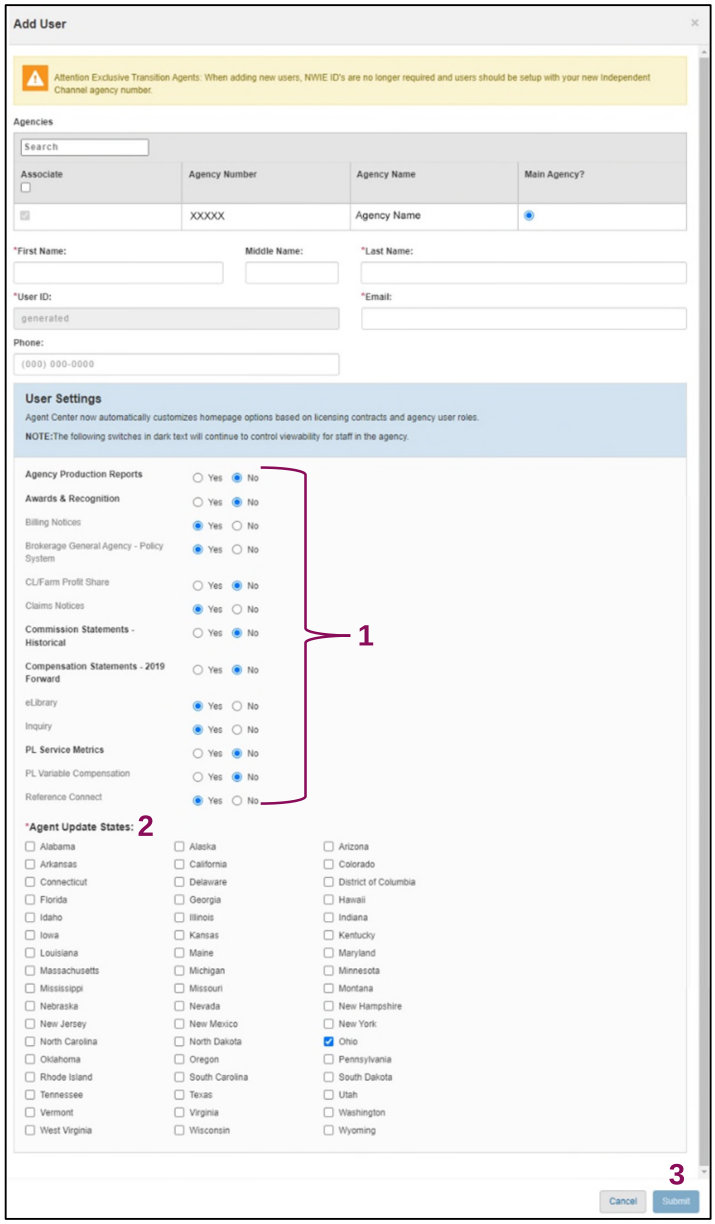
Action

Complete the basic information and Producer settings sections:

- **Associate Agency** - if you, as the administrator:
  - Have access to one agency code, the new user will automatically have the same main agency assigned.
  - Have access to more than one agency, a list of your agency access appears.
    - Select the User's main agency.
    - Check the boxes for all agencies the user needs to access.
- **Producer Information** - Provide complete information. The user's phone number is helpful to the Service Desk staff as they provide customer service to your agency. You must provide the email address for each new user. They will receive their User Account ID and a one-time password directly from the company to this address.
- **User Settings** - From the list that displays:
  1. Producers will have access to links and information within Agent Center based on your agency's contract. Additional items such as reports, and download config are available only to admins.
  2. Use the checkboxes below the “Agent Update States” field to select additional states for agent updates (notifications through Agent Center). The agency resident state is the default.
  3. After you complete the fields, select “Submit” and the system automatically assigns a new User ID.

A confirmation message displays on the screen indicating the ID was successfully added and the user information displays. A confirmation email is sent to the administrator adding the user outlining the basic information. A password will be assigned, and an email message sent to the producer which includes their one-time password.

Screen



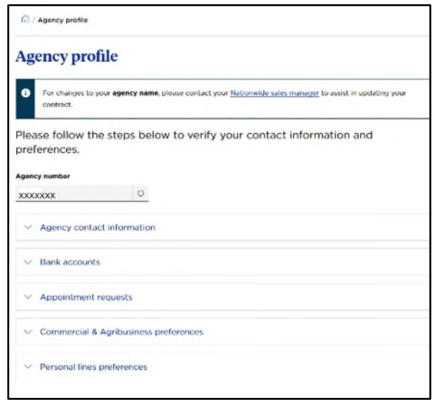
Note: The User ID is not active until the password email has been received.

Agency Profile Updates

What's changed?

- AMS download & registration is still accessible from the "Agency" tab of the mega menu, but it is no longer available from Agency profile
- Two pages are being retired since that functionality was added within Agency Profile:
  - Licensing maintenance
  - Producer audit from Agent Center administration

Agency profile – All Functions

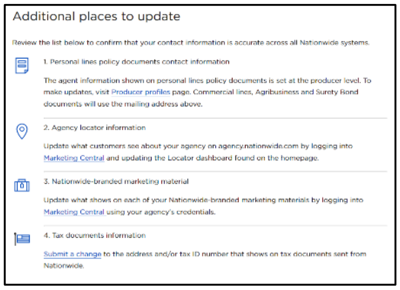
Action	Screen
Available for all agency staff under the "Agency" tab, "Agency profile" section. This feature provides the ability to request updates to agency and producer information. Use the links on the page to complete forms which are electronically submitted through DocuSign to Licensing staff for processing.	

The following licensing maintenance forms/features are available:

- Update agency bank account information - premium sweep (Compensation bank accounts should be updated directly in SAP Sales Cloud)
- Add non-resident states, company appointments, or product lines to existing agencies/producers
- Cancellation requests for producers, states, or company appointments/product lines
- Producer name, email, or home address changes
- Adding a new producer to an existing agency (administrator must forward form link to the new producer to complete and submit).

Complete the form and sign electronically. Prompts and instructions are provided within each form. Once you select the "Finish" button, the form will route appropriately.

Agency profile – Agency contact information

Action	Screen
"Agency contact information" - request updates to agency and producer information: • Office location address • Mailing address • Phone and email address • Office phone • Fax (optional) • Agency email address • Website (optional) "Additional places to update" This section provides other places where the agency contact information may need to be updated. Review and update as needed.	 

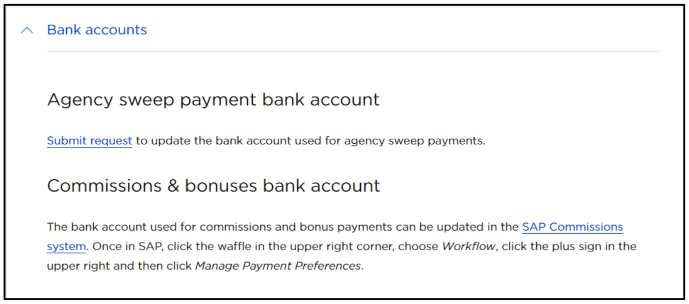
Agency profile – Bank accounts

Action

Update bank accounts for:

- Agency Sweep
- Commissions – link to SAP Commissions system

Screen



Agency profile – Appointment requests

Action

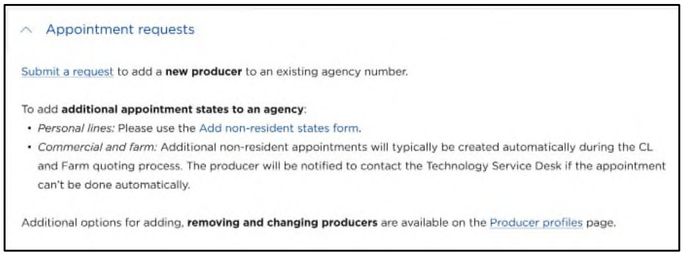
Producer updates:

- Add a new producer
- Appointment requests

Edit:

- Name
- Home address
- Telephone
- Email

Screen



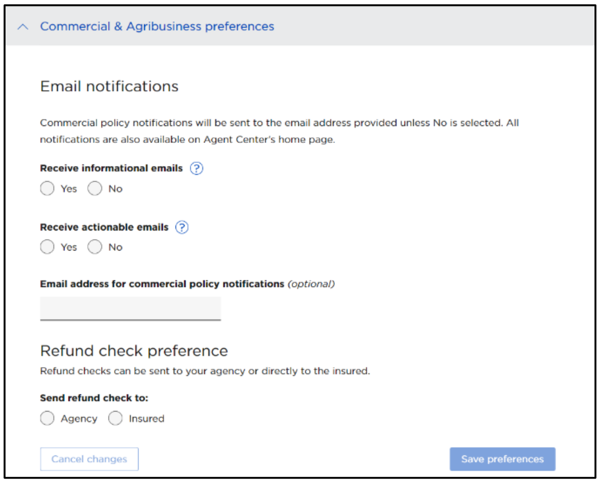
Agency profile – Commercial & Agribusiness preferences

Action

Commercial & agribusiness preferences on:

- Email for policy notifications
- Informational & actionable email notifications
- Refund check preference

Screen



Agency profile – Personal lines preferences

Action

Personal lines preferences on:

- Email notifications
- Service Alliance 360
- Nationwide-branded marketing materials
- Tax document information

Screen