AGENTXPRESS Instructions

Agents have the options of setting up their employees within their office under three separate roles:

1. Agent: has access to policy inquiry, claims inquiry, billing and documents. *No access to reports.*

2. Report viewer: has access to policy inquiry, claim inquiry, billing and documents. Able to access pending cancellation reports, expiration reports, loss run reports. *Not able to view commissions or agency experience reports.*

3. Agency Administrator: has the ability to administer the system in all areas. Can add, edit and delete users within their office. Able to view all reports including commissions and agency experience.

Brief overview of the different tabs in AgentXpress and the functions of each, keep in mind it depends on the user's role as to the functionality.

Policy Inquiry Tab:

This tab gives the user the ability to search by policy number to pull up current or prior policy coverage, billing details, claims summary and documents.

Claim Inquiry Tab:

This tab gives the user the ability to search by claim or policy number to pull up the summary of claim information, claimant information, claim professionals and claim payments.

Reports Tab:

This tab gives the user the ability to pull the following reports:

- Pending Cancellation: searches by selecting the line of business.
- Expiration: gives you a list of expiring policies for a specified time frame.
- Loss Runs: on an individual policy basis.
- Commissions: access to your commission statements on a monthly basis.
- Agency Experience: generates a report for a specified time frame.

About us Tab:

This tab gives you a brief overview of our Companies Philosophy.

Contact us Tab:

This tab gives you contact numbers and fax numbers for different departments. If you are emailing us for changes to a policy or information regarding a claim we request that you contact us using one of the following general email addresses:

- Claims: claims@securitymutual.com
- Endorsements: endorsements@securitymutual.com
- Cancellations: cancellations@securitymutual.com

My Profile Tab:

This tab gives the user the ability to change their password or security question. It also allows you to update your name and email address.

Administration tab:

Agency Administrators are able to perform the following functions using this tab:

1. Add a new user: click on the administration tab, under actions click on +Add, Assign a username and complete the screen. The user will receive an e-mail (from noreply@securitymutual.com) with their temporary password. They need to copy and paste that password in when they log in the first time. User can then go to My Profile tab at the top to change their password to something user friendly for them.

2. Edit/delete user profiles: click on the administration tab and all users will display, highlight the user they wish to edit or delete. Under actions select the "pencil" icon to edit or the "trash can" to delete.

3. Reset Passwords: click on the administration tab, under user management click on the reset "key" icon next to the user name. The user will receive an e-mail (from noreply@securitymutual.com) with their temporary password. They need to copy and paste that password in when they log in the first time. User can then go to My Profile tab at the top to change their password to something user friendly for them.

4. Agency Management: the administrator can edit the Agency Information's e-mail notification under this tab. This e-mail is designed to notify the agency when they have documents ready to print in the system.

If the agency needs help with AgentXpress please direct your call or email to Mindy Dudgeon 607-319-5474 (direct line) or e-mail mdudgeon@securitymutual.com

We are looking forward to receiving more of your valued business!

SHARED PURPOSE. **MUTUAL VALUES.**™