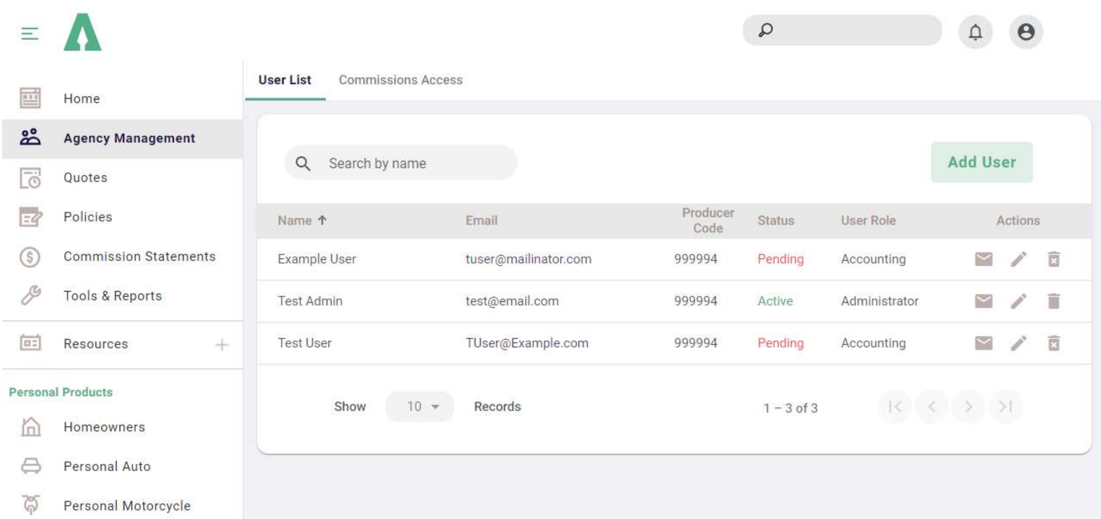
Agency Management

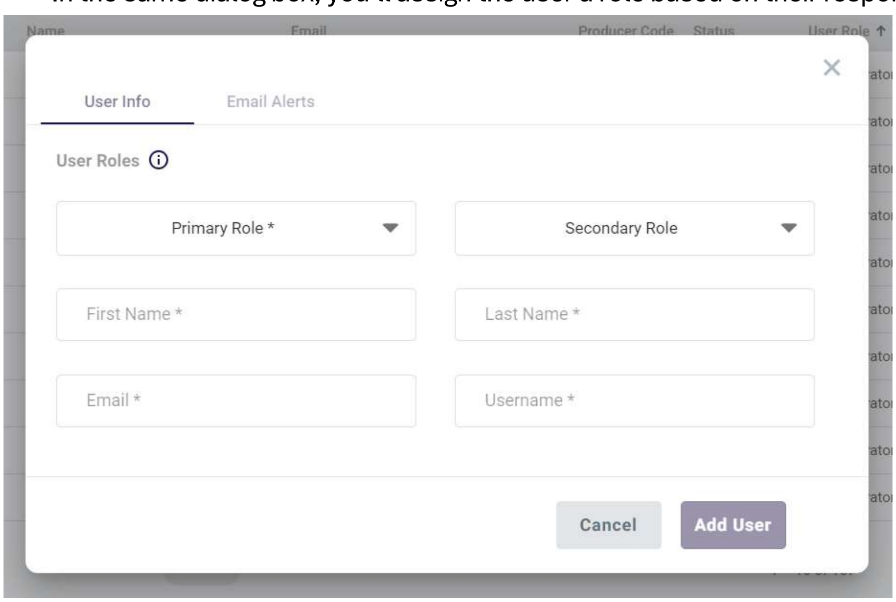
Users with an **Administrator** role can access the Agency Management section via the left navigation menu. This section is where you can manage all user accounts for your agency.

Adding a new user

- In the left-hand navigation menu, click on “Agency Management” to access your agency’s user management dashboard.
- Locate and click the “Add User” button on the upper right corner. This action will open a dialog box where you can enter the new user’s details.



- In the dialog box, you’ll see several fields that need to be completed, including name, email and username.
- In the same dialog box, you’ll assign the user a role based on their responsibilities.

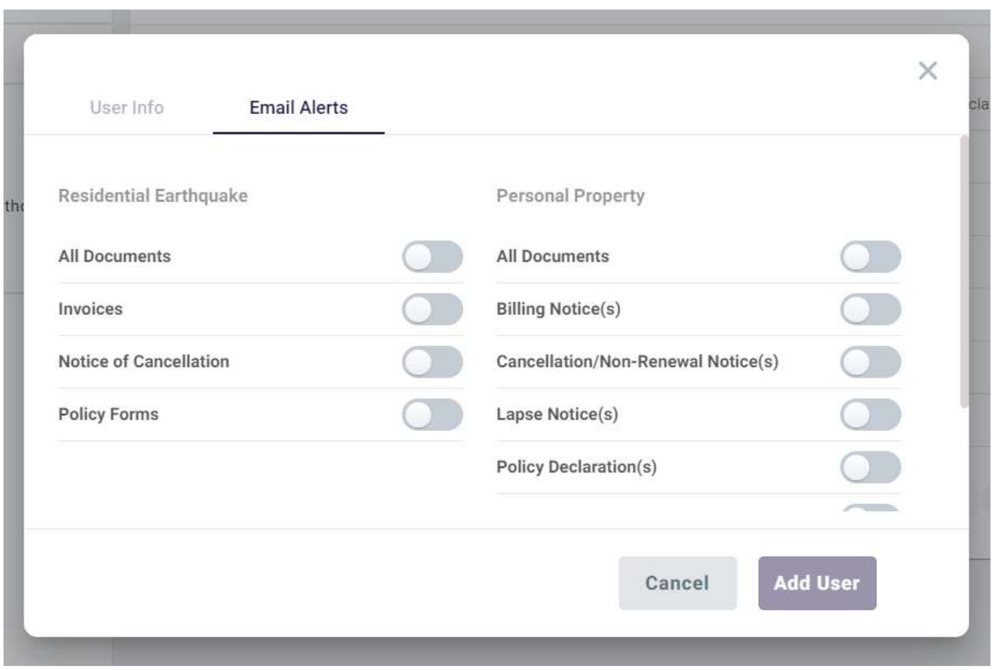


- "User Roles" define what parts of the system users can manage, such as Quote / Service or Commission Statements.

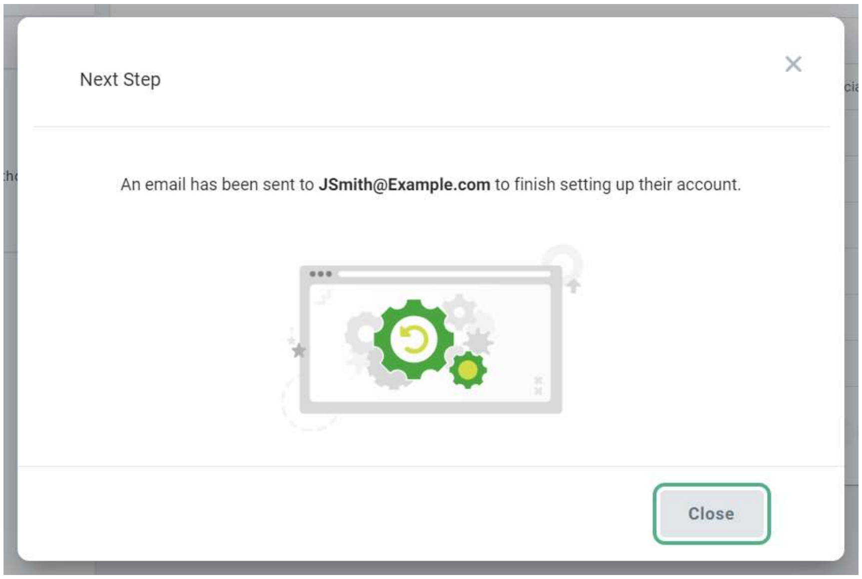
User Roles

	Quote / Service	Commission Statements	Add / Delete users
Administrator	✓	✓	✓
Accounting	✓	✓	✗
All Other	✓	✗	✗

- If you'd like the new user to receive automatic notifications when certain documents become available, you'll want to configure their email alerts by clicking on the "Email Alerts" tab within the same dialog box.
- Toggle the switch right for each type of notification the user should receive, such as Policy Forms and Billing Notices.
- To complete the process, be sure to click the "Add User" button once you've selected the appropriate alerts and double-checked the information you've entered for accuracy.



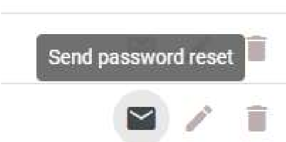
- After clicking the “Add User” button, you’ll be notified that the new user will receive an email prompting them to finalize their account registration. You may click on the “Close” button to return to the Agency Management dashboard.



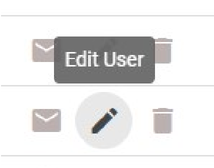
Managing Existing Users

After creating user accounts, administrators have several options for managing them effectively. Look for the following icons next to each user’s account:

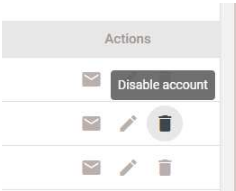
- **Send password reset:** Look for the envelope icon next the user’s name. Clicking this will send a password reset email to the user’s registered email address, allowing them to update their login credentials.



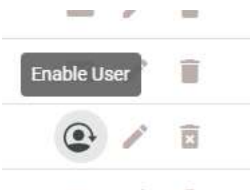
- **Edit user:** To modify a user’s information, such as changing their role or email address, click the pencil icon. This will open their account details for editing (note: usernames cannot be changed).



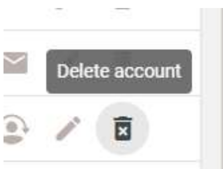
- **Disable account:** If you need to temporarily suspend a user's access, click the trash can icon. The user's status will switch to "Disabled", and they won't be able to log in until re-enabled.



- **Enable user:** To reactivate a previously disabled account, click the user icon, which will change the user's status back to 'active'.



- **Delete account:** For accounts that are no longer needed, you can click the trash can with an 'x' icon to permanently remove the user from the system. Keep in mind that this action cannot be undone, so proceed with caution.



You're all set!

Managing your agency's users in Arrowhead Exchange is designed to be simple and efficient. By following the steps outlined here, you'll be able to seamlessly control user roles, account settings and everyday operations. And should you need any further assistance or have questions along the way, our tech team is here to help. Just reach out to us at TechSupport@ArrowheadGrp.com or call 760-710-6844. We're here to help you make the most of your experience on Arrowhead Exchange!