# **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.

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	Home	User List Commissions Acce	355						
å	Agency Management								
0	Quotes	Q Search by name				Add User			
El	Policies	Name 🕈	Email	Producer Code	Status	User Role	A	ctions	1
\$	Commission Statements	Example User	tuser@mailinator.com	999994	Pending	Accounting	$\sim$	/	×
ß	Tools & Reports	Test Admin	test@email.com	999994	Active	Administrator	$\geq$	1	ĩ
121	Resources +	Test User	TUser@Example.com	999994	Pending	Accounting	$\geq$	1	X
Personal Products		Show 10 -	Records		1 - 3 of 3	1< <			
$\ominus$	Personal Auto								
ক্ষ	Personal Motorcycle								

- 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.

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Primary Role *	▼ Secondary Role ▼
First Name *	Last Name *
Email *	Username *

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• "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	$\odot$	$\odot$	$\bigotimes$
Accounting	$\odot$	$\odot$	$\otimes$
All Other	$\odot$	$\otimes$	$\otimes$

- 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.

User Info Emai	il Alerts		
Residential Earthquake		Personal Property	
All Documents	$\bigcirc$	All Documents	
Invoices	0	Billing Notice(s)	
Notice of Cancellation	$\bigcirc$	Cancellation/Non-Renewal Notice(s)	
Policy Forms	$\bigcirc$	Lapse Notice(s)	
		Policy Declaration(s)	
			~
		Cancel Ad	d User



• 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'.

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Enable User	Î
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• **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 <a href="https://www.commons.org">TechSupport@ArrowheadGrp.com</a> or call 760-710-6844. We're here to help you make the most of your experience on Arrowhead Exchange!