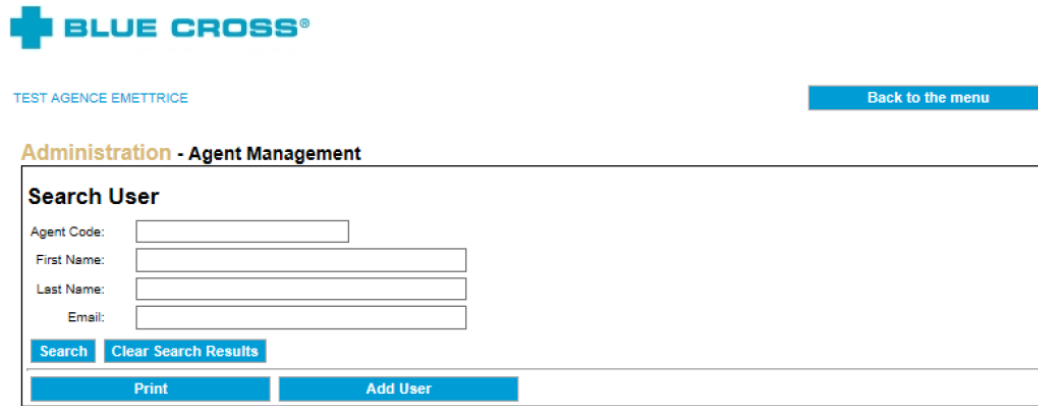


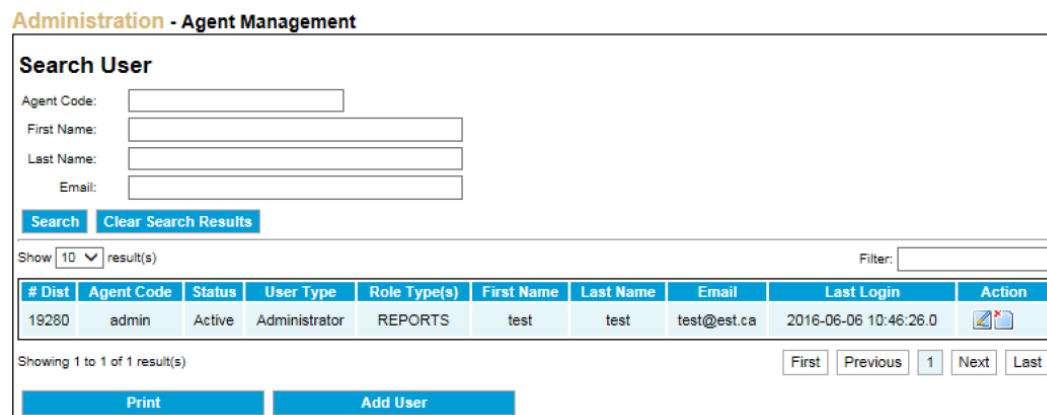
# Creating New Users

At the top of the menu page, select Administration and then Agent Management.



Leave all the fields blank and click on **Search**.

All existing agent codes will be listed under the search fields.





Under the list, select **Add User**. A new section will appear underneath.

## Administration - Agent Management

### Search User

Agent Code:   
First Name:   
Last Name:   
Email:

Show  result(s) Filter:

| #     | Dist | Agent Code | Status | User Type     | Role Type(s) | First Name | Last Name | Email        | Last Login            | Action  |
|-------|------|------------|--------|---------------|--------------|------------|-----------|--------------|-----------------------|---|
| 19280 |      | admin      | Active | Administrator | REPORTS      | test       | test      | test@test.ca | 2016-06-06 10:46:26.0 |   |

Showing 1 to 1 of 1 result(s)

**User Code:** \*

**Distributor Number:** 19280

Please Note: The password must contain between 8 and 12 characters inclusively, with a minimum of one numerical character. Also, it must be composed of alphanumeric characters only.

**Password:** \*

**Password (Confirmation):** \*

**Password Expiration?:**  (Forces user to change password on first login)

**First Name:** \*

**Last Name:** \*

**Type ID:** \*

**Role Type(s):**

**Language:** \*

**Email:** \*

**Status:** \*

\* Mandatory Information

Complete it as follows:

**User Code** = Agent code (ex: first name)

**Password:** Enter a password and confirm it. It should be alphanumeric (letters and numbers) and include 8 to 12 characters (ex: *abcd1234*). This is temporary and will be valid for 7 days.

Please make sure to select **Password Expiration** as this will ensure the agent/broker will be prompted to change the temporary password on first login.

**First Name** of agent/broker    **Last Name** of agent/broker

**Type ID:** Select *User* for regular access.

Select *Administrator* if you want agent/broker to have access to the *Agent Management* section (not recommended unless actual administrator).

**Role Type(s):** Only select (blue highlight when you select) if you want the agent/broker to have access to the Reports (*Commission statements* and *Reports on annual plans* coming up for renewal).

**Language:** *English/French*

**Email:** agent/broker's email address. All email addresses listed in online access profiles should be different, no two agent codes should have the same one.

**Status:** *Active*.

Administration - Agent Management

**Search User**

Agent Code:   
First Name:   
Last Name:   
Email:

[Search](#) [Clear Search Results](#)

Show  result(s) Filter:

| #     | Dist | Agent Code | Status | User Type     | Role Type(s) | First Name | Last Name | Email       | Last Login            | Action |
|-------|------|------------|--------|---------------|--------------|------------|-----------|-------------|-----------------------|--------|
| 19280 |      | admin      | Active | Administrator | REPORTS      | test       | test      | test@est.ca | 2016-06-06 10:46:26.0 |        |

Showing 1 to 1 of 1 result(s) [First](#) [Previous](#) [1](#) [Next](#) [Last](#)

[Print](#) [Add User](#)

User Code: \*

Distributor Number: 19280  
Please Note: The password must contain between 8 and 12 characters inclusively, with a minimum of one numerical character. Also, it must be composed of alphanumeric characters only.

Password: \*

Password (Confirmation): \*

Password Expiration?:  (Forces user to change password on first login)

First Name: \*

Last Name: \*

Type ID: \*

Role Type(s):

Language: \*

Email: \*

Status: \*

[Save User](#)

\* Mandatory Information

Once all fields have been completed, click on **Save User**.

User Blue has been saved successfully!

Warning! This distributor has 7 day(s) to login to his account in order to activate it.

Administration - Agent Management

**Search User**

Agent Code:   
First Name:   
Last Name:   
Email:

[Search](#) [Clear Search Results](#)

Show  result(s) Filter:

| #     | Dist | Agent Code | Status | User Type     | Role Type(s) | First Name | Last Name | Email        | Last Login            | Action |
|-------|------|------------|--------|---------------|--------------|------------|-----------|--------------|-----------------------|--------|
| 19280 |      | Blue       | Active | User          | --           | Blue       | Cross     | test@test.ca |                       |        |
| 19280 |      | admin      | Active | Administrator | REPORTS      | test       | test      | test@est.ca  | 2016-06-06 10:46:26.0 |        |

Showing 1 to 2 of 2 result(s) [First](#) [Previous](#) [1](#) [Next](#) [Last](#)

[Print](#) [Add User](#)

If you have any questions or need assistance, please call Info-Partners at 1-800-361-2538 (option 1).