

How to Update Users

Portal Instruction Guide – Producers

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NOTE: Log in to the Producer portal using Google Chrome, Microsoft Edge, or Mozilla Firefox.

Add User

- From the **Quick Links**, select **Update Your Details**.

- Locate the **Organization Management** header.
- Select **Add a New User**.

Name	Role	Active	Locked	Actions
Agent Partner	Producer	Yes	No	...
Test User	Producer	Yes	No	...
Test Securitylab.io	Producer	No	Yes	...

Results of 10

4. Enter **First Name, Last Name, Phone Number, Email/User ID** on the Add New User dialog box.
5. Select a **User Role**.
6. Enter an **Address** or select **Use Organization Address**.
7. Select **Add User**.

Add New User

First Name: Jane

Last Name: Doe

Phone Number: 573-819-7171

Email/User ID: janedoe@exampleagency.com

User Role: Producer Admin

Use Organization Address:

Address Line 1: PO Box 1810

Address Line 2: -

Zip Code: 65205

City: Columbia

County: Boone

State: Missouri

Buttons: Cancel, Add User

8. Select **OK** on the New User Added dialog box.

Confirmation

New User Added!

Buttons: Cancel, OK

Edit User

1. On the **Organization Management** header, under Actions, select **Edit User**.

Organization Management

[Add A New User](#)

Name	Role	Active	Locked	Actions
Agent Partner	Producer	Yes	No	...
Test User	Producer	Yes	No	<ul style="list-style-type: none"> Edit User Lock User Deactivate User
Stophard Portal Header		Yes	No	
Automated Testing Scripts	Producer	Yes	No	...

2. Update **First Name**, **Last Name** or **Role**.
3. Select **Update**.

Edit User Info

First Name
Jane

Last Name
Doe

Role
Producer

[Cancel](#) [Update](#)

4. Select **OK** on the User info updated dialog box.

Confirmation

✓ User info updated!

[Cancel](#) [OK](#)

Lock User

To temporarily disable a user, use the Lock User function.

1. On the **Organization Management** header, under Actions, select **Lock User**.

Organization Management

[Add A New User](#)

Name	Role	Active	Locked	Actions
Agent Partner	Producer	Yes	No	...
Test User	Producer	Yes	No	Edit User
Stephan Portal Master	Producer	Yes	No	Lock User
Automated Testing Scripts	Producer	Yes	No	Deactivate User

2. Select **OK** on the User is locked dialog box.

Success

User is locked

OK

Unlock User

Use the Unlock User function to reenable a locked user.

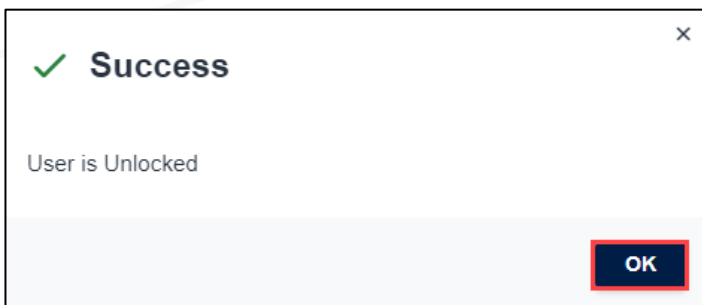
1. On the **Organization Management** header under Actions, select **Unlock User**

Organization Management

[Add A New User](#)

Name	Role	Active	Locked	Actions
Agent Partner	Producer	Yes	No	...
Test User	Producer	Yes	No	...
Stephan Portal Master	Producer	Yes	No	...
Jane Doe	Producer Admin	Yes	Yes	Edit User
				Unlock User
				Deactivate User

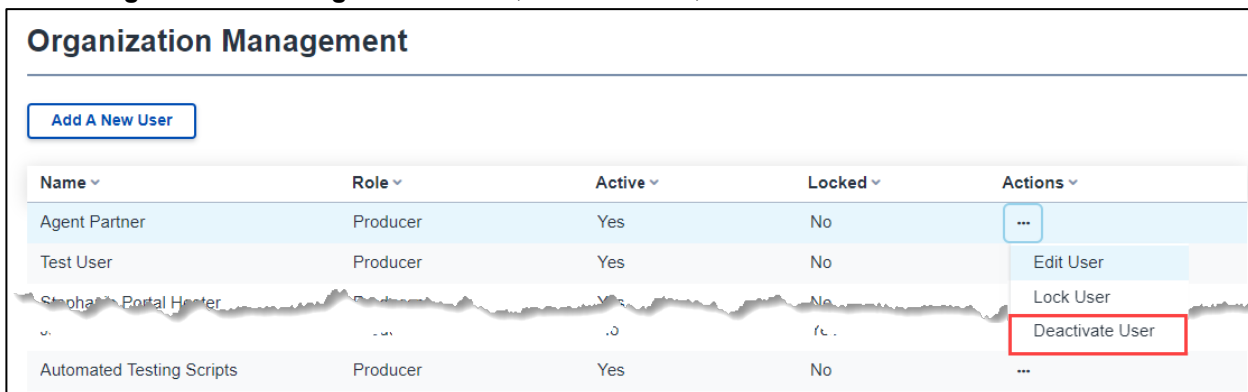
2. Select **OK** on the User Info Updated dialog box.



Deactivate User

Use the Deactivate User function to remove a user from the portal permanently.

1. On the **Organization Management** header, under Actions, select **Deactivate User**.



2. Select **OK** on the User Deactivated dialog box.

Where to Get Help

If this document does not address your questions, please contact **Customer Care** at customercare@mem-ins.com or 1.800.442.0593.