



# How to Update Users

## Portal Instruction Guide – Agent Portal

Click on any Table of Contents section to go directly to that section.

<b>Add User</b> .....	<b>1</b>
<b>Edit User</b> .....	<b>3</b>
<b>Lock User</b> .....	<b>4</b>
<b>Unlock User</b> .....	<b>5</b>
<b>Deactivate User</b> .....	<b>5</b>
<b>Where to Get Help</b> .....	<b>6</b>

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

## Add User

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

The screenshot shows the top navigation bar with the text "EXPLORE HOW YOUR BUSINESS ALIGNS WITH OUR APPETITE" and a "VIEW OUR APPETITE GUIDE >>" button. Below this are six metric cards: Quotes (9), Prospects (0), Renewals (2), Changes (4), Delinquencies (2), and Cancellations (0). On the right, the "Quick Links" section includes: Make a Payment, Report an Injury or Incident, Change a Policy, View Account Activity, Generate Certificate of Insurance, Generate A Loss Run, **Update Your Details** (highlighted with a red box), and Virtual Claims Kit.

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

The screenshot shows the "Organization Management" header. Below it is a button labeled "Add A New User" (highlighted with a red box). Underneath is a table with the following columns: Name, Role, Active, Locked, and Actions. The table contains three rows of data:

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

At the bottom of the table, it says "Results of 10".



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

**Add New User** [x]

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.

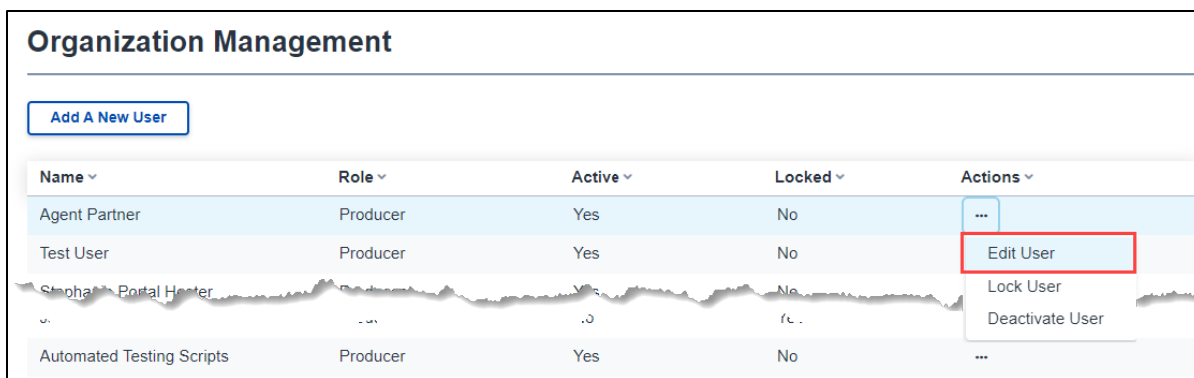
**Confirmation** [x]

New User Added!

Buttons: Cancel, OK

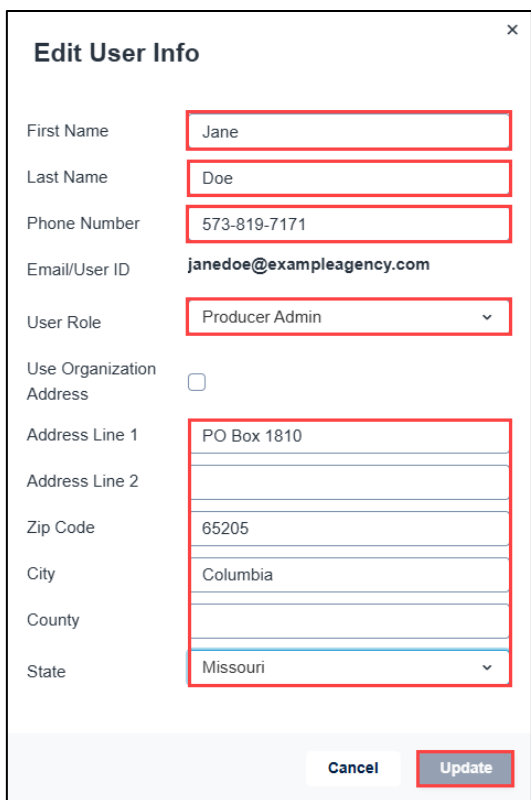
## Edit User

1. Locate the **Organization Management** header.
2. Under **Actions**, select the **Three Dots** on the desired user profile.
3. Select **Edit User**.



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

4. Update **First Name, Last Name, Phone Number, User Role** or **Address**.
5. Select **Update**.



### Edit User Info

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

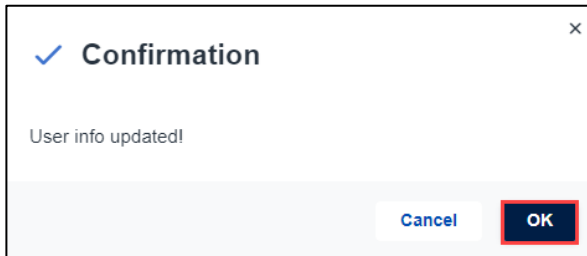
City: Columbia

County:

State: Missouri

Cancel Update

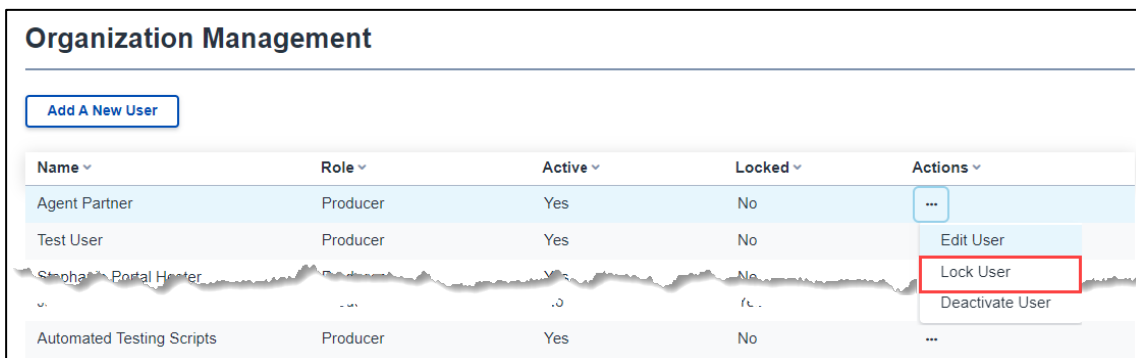
6. Select **OK** on the user info updated dialog box.



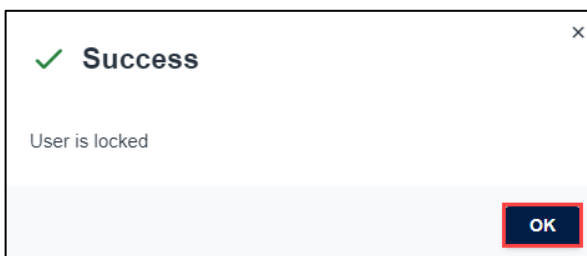
## Lock User

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

1. Locate the **Organization Management** header.
2. Under **Actions**, select the **Three Dots** on the desired user profile.
3. Select **Lock User**.



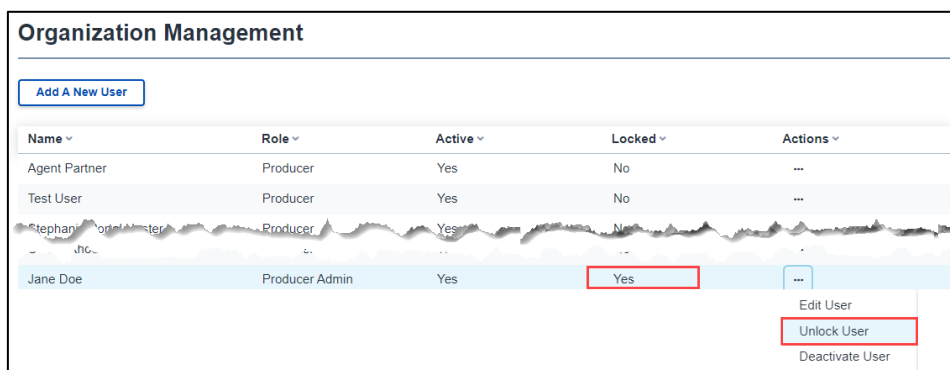
4. Select **OK** on the User is locked dialog box.



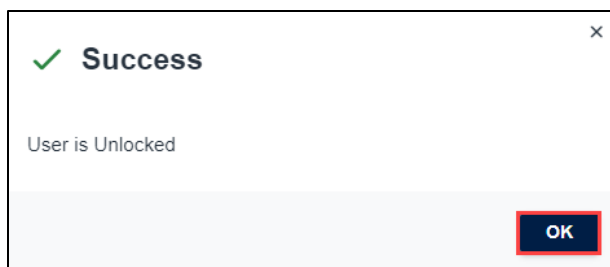
## Unlock User

Use the Unlock User function to reenable a locked user.

1. Locate the **Organization Management** header.
2. Under **Actions**, select the **Three Dots** on the desired user profile.
3. Select **Unlock User**.



4. Select **OK** on the user is unlocked dialog box.



## Deactivate User

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

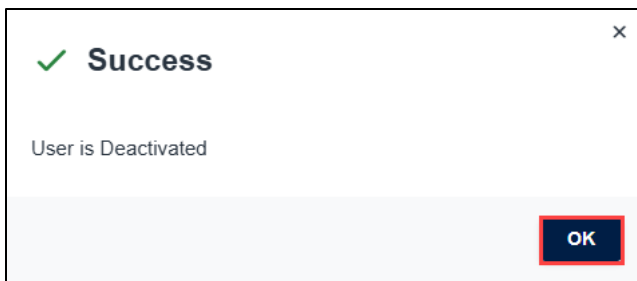
1. Locate the **Organization Management** header.
2. Under **Actions**, select the **Three Dots** on the desired user profile.
3. Select **Deactivate User**.

### 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 Host	...	...	...	Lock User
...	...	...	...	Deactivate User
Automated Testing Scripts	Producer	Yes	No	...

4. 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](mailto:customercare@mem-ins.com) or 800.442.0593.