

Agency Contact Guide

Agency Contact Guide

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Confidentiality Agreement

This material contains confidential and proprietary information of the Donegal Insurance Group, intended to facilitate the use of Donegal business tools and software. Any other use or distribution of this information is prohibited.

CREATE EMPLOYEE WEB USER ID



SELECT "Agency Services" ENTER "Contact Maintenance" or "Agency Principal" user ID & password LOGIN

Dashboard	Make a Payment	Resources R	lepoi	rts Report a Claim						
Quoting	Agenc	y Dashboard						Policy / Claim Search 🧿		
Write PRO	New Agency Portal Redesigned - easier to use, saving you time!									
	Polic	y Activity as of	07/07	Corresp	00	ndence For last 7 days		News & Noteworthy		
Write ^B	Z. Persona	l Lines		Commercial Lines		PL / CL Combined		Web Site News		
	> New P	olicies	0	> New Policies	0	> New Policies	0	Agency Portal		
Write	> Renew	ed Policies	0	> Renewed Policies	0	> Renewed Policies	0	Accounting Documents		
FARM	> Premiu	Premium Endorsed Policies 0		> Premium Endorsed Policies		> Premium Endorsed Policies	0	Available Online		
	> New C	laim Payments	0	> New Claim Payments	0	> New Claim Payments	0	Marketing News		
Tools				> Audit Policies	0			"Like" Us, "Follow" Us		
> Our Agency	> Lapsed	l/Rescinded	0	> Lapsed/Rescinded	0	> Lapsed/Rescinded	0	PL Training News		
> Our Agency C	ontacts > Cancel	ing in 10 Days	0	> Canceling in 10 Days	0	Canceling in 10 Days	0	Virginia		
> Commercia Change - Mar	Al Policy > Expirin	g in 60 Days	0	> Expiring in 60 Days	0	> Expiring in 60 Days	0			
> VIN Lookup	> PL Ins	pections Ordered	0							
> Payment Option	ons									
Agency EFT Authorization	Form									

SELECT "Our Agency Contacts"

Dashboard	Make a F	ayment	Resources	Repo	orts	Report a Claim					
Quoting		Agency	Contact Ma	ainter	nance					Policy / Claim Search 3	
Write)	Please ref	er to the Agency (to the Agency Co	Advanced Search							
Write	iz.	Accurate a section of and accura product ne fax transm									
		Agency	Locations		Contact	Type		Display Option			
Our Agency Information Our Agency C	Contacts	All Create Ne	w Contact	~	Show Al	Il Contact Types	~	Abbreviated	~		
> + Commercia	al Policy	Name		Licens	ed Emai	il		Pho	one		
> VIN Lookup	lual	AAA, TE	ST	No							
> Payment Option	ons	ACCES	S, EZLYNX	LYNX No							
Authorization	Form	AGENC	Y, TEST	No							
> Insured APP & Authorization	& RCC Forms	ASDFAS ASDFAS	SDF. SDF ASDFADSF	No				Ph:			

CLICK "Create New Contact"

Dashboard Ma	ke a Payment	Resources	Reports	Report a Claim			
uoting	Contac	t Details				Policy / Claim Search 🚱	
Write			15 1022541		Return To List of Contacts »	Q	
PRO	PLEASE I If you are	adding a licens	does NOT n ed contact th	naintain licensing info	ormation for contacts. should continue to follow existing	> Advanced Search	NOTE:
WriteRiz	procedure	es to communic	ate Licensing	Information to the D	onegal branch office.	Quick Page Links	For security
	Individ	ual Contact Info	6			> Top > Individual Contact	purposes, there
Write	First Na	ime:	Mide	Middle Name: Last Name:		Info > Login Information for Website	should be
	Legal F	irst Name:	Lega	al Middle Name:	Legal Last Name:	 Contact Primary Location Info 	between the
ools • Our Agency	Title:		Pho	ne Number:	Fax Number:	 Contact Attributes Contact for Agency Codes 	employees of your agency.
Our Agency Conta	E-mail	Address:	Are	you adding a licensed	i contact?	> Submit Form	Each web user
 VIN Lookup 							should have their
Agency EFT	Login I	nformation for	Vebsite				own unique user II
Authorization For Insured APP & RC		v this contact to u	se website? -	Check the box to ALL	OW this user to use the website.		and password for
Authorization For	User Na	ame:	New	Password:			company websites
 'rincipal Reports Monthly Agency Experience Monthly Direct Bill Commissions 	Both us employe passwo	ername and pass ees of their new u rd when they logi	word should t ser name and n.	be 8 characters or more I password once create	CSR Incentive e in length. Please advise your ed. User will have to select a new		

COMPLETE Individual Contact Info SELECT "Allow this contact to use website?" ENTER User Name & new password SELECT "CSR Incentive" to participate in incentive program

Location:	
SELECT LOCATION	\checkmark
Address:	Phone:
	Fax:
	Email:
Please verify that the location info	nation is correct.
Use the Text block below to com	nunicate Location Information changes, or any other generation
correspondence to the Donegal	ranch Office

SELECT location from drop down menu Changes in agency location data can be entered into the text block for submission to the branch office

Contact Attributes Check All That Apply		
Personal Lines	Commercial Lines	Other Contacts
PL Incentives Contact	CL Transactions Report	Customer Service Rep
PL Contact	Email	Commission Statement
PL Claims Contact	CL Incentives Contact	Contact
PL Cancel-Lapse Contact	CL Contact	Automation Contact
	CL Claims Contact	Accounting Contact
	CL Cancel-Lapse Contact	
	CL Automated Renewal Contact	

APPLY "Contact Attributes"

NOTE: Selecting an item in the Contact Attributes section designates that user as the recipient of company email notifications for the selected contact type.

If you make NO selection for either PL or CL Claims Contact, the Agency Principal will automatically receive these notifications by default. The Agency Principal will also automatically receive email notifications of a TOTAL LOSS regardless of who is designated as a Claims Contact.



SELECT the agency code(s) you want the user to view on the website

SELECT "Agency Sweep (EFT)" to allow user to post Electronic Funds Transfers on the website SELECT "Account Clerk" to grant user access to Commission Reports on the website CLICK "Submit Form" to complete

NOTIFY employee of new user ID & password

NOTE: Selecting "Contact Management" allows the designated user access to the Agency Contact portion of the site and the ability to modify or establish user information at the agency level. Typically this designation should NOT be assigned to each individual user.

Selecting "Account Clerk" allows the designated user access to the Direct Bill Commission reports which can typically only be seen by the holder of an "Agency Principal" user ID. An "Account Clerk" user will ONLY be able to see the commissions report and will not be able to access any of the other reports that are usually available to the Agency Principal. Typically this designation should NOT be assigned to each individual user.

The "Principal" option can NOT be assigned at the agency level. This user type can ONLY be designated by the company upon receipt of an Agency Principal Web Registration Form.

If the "Agency Sweep (EFT)" field is grayed out, contact Automation Support at 888-640-5840 to activate.

CHANGE EMPLOYEE WEB USER

Dashboard	Make a l	Payment	Resources	Repo	orts Repo	ort a Claim				
Quoting		Agency	Contact M	ainte	nance					Policy / Claim Search 3
Alleite		Please ref	er to the Agency	Contact	Guide for det	ails on how to	mainta	ain your agency conta	ect information.	9
PRO	<i>b</i>	Welcome	> Advanced Search							
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Information > Our Agency	Contacts	Create New Contact								
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> VIN Lookup	anual	AAA, TE	ST	No						
> Payment Op	otions	ACCES	C EZI VNV	No						
> Agency EFT Authorizatio	n Form	AGENC	Y. TEST	No	-					
> Insured APF Authorizatio	e & RCC	ASDFA:	SDF.	No						

CLICK employee name in contact list

DONEGAL INSURANCE GROUP

AGENCY CONTACT GUIDE

control Details Ream To List of Control With Water No Status ACTUE Control Details With Water No List Water No List Water No Yes Status ACTUE List Water No Yes List Water No List Water No Yes Status ACTUE List Water No Yes List Water No List Water No Yes Status ACTUE Status ACTUE Yes Mater No Status ACTUE Yes Status ACTUE Status ACTUE	Dashboard Make a l	Payment Resource	es Repo	orts Report a (Claim						
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ADD, CHANGE or REMOVE contact data entry Logins for existing contacts can be also created here if needed CLICK "Submit Form" when completed

DEACTIVATE EMPLOYEE WEB USER

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CLICK employee name in Contact List

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write	Individ	ual Contact Info	> Top			
	First Na	ame:	Mide	dle Name:	Last Name:	> Individual Contact
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	. Legal F	irst Name:	Lega	al Middle Name:	Legal Last Name:	> Contact Primary
	TEST		E		USER4	Location Info
Tools	Title:		Pho	ne Number:	Fax Number:	> Contact Attributes > Contact for Agency
> Our Agency			111-	-222-3333	222-333-4444	Codes
Information	Contacts E-mail	Address:				> Submit Form
> + Commercia Change - Mar	al Policy nual					

CLICK the "Deactivate" button



ENTER deactivation date ENTER deactivation reason CLICK "Continue"

?	You are requesting to deactivate TEST USER4 with a termination effective date of 07/08/2015.
	This will remove the user from all company systems and terminate all company appointments for this individual.
	Please click OK to continue or cancel to stop the request.

CLICK "OK" to confirm deactivation request

Dashboard	Make a P	ayment	Resources	Reports	Report a Claim					
Quoting		Contac	t Details				Policy / Claim Search 🕄			
Alleito						Return To List of Contacts »	ب			
PRO		License	> Advanced Search							
Write	WriteBiz. Peactivation submitted: Your request for If you would like contact deactivation, web access for this including removal of contact removed web access, is being immediately, processed and will be uncheck the "Allow									
Tools > Our Agency Information > Our Agency > ⊕ Commerc Change - Ma > VIN Lookup > Payment Op > Agency EFT Authorization	Contacts cial Policy anual otions n Form	processed and will be uncheck the "Allow completed by close of contact to use web business on the date site" checkbox under requested "Login Information for Website", and submit your changes.								
> Insured APP Authorization	9 & RCC n Forms	Individ	ual Contact Info							
		First Name:		Mide	lle Name:	Last Name:				
Principal Rep	orts	TEST		E		USER4				
> Monthly Age	ency	Legal Fi	irst Name:	Lega	al Middle Name:	Legal Last Name:				
Experience	act Bill	TEST		E		USER4				
Commission	IS	Title:		Pho	ne Number:	Fax Number:				
> YTD Claims	Incurred			111-	-222-3333	222-333-4444				
 > Travel Incen Bonus Point > Service Cen Activity 	itive ts ter	E-mail / KIMFEF	Address: RRY@DONEGALC	GROU						
Allow this of	contact to u	se website	? - Uncheck the b	ox to DISAL	LOW this user to u	se the website.				
User Name			New Passwor	d						
SURPRISE	1000				V CS	R Incentive				
Both User Na	ame and p	assword s	hould be 8 char	acters or m	ore in length. Us	er will have to select a new password whe	n they login.			

Deactivation acknowledgement generated. Request will be processed by close of business of the deactivation date entered. RETURN to "List of Contacts"

For IMMEDIATE user termination, after acknowledgement has been received:

DESELECT web access check box CLICK "SUBMIT FORM" button at bottom of page

REACTIVATE EMPLOYEE WEB USER

Dashboard Make	a Payment Resources	Reports Report a Claim							
Quoting	Contact Details			Policy / Claim Search 3					
Write			Return To List of Contacts »	Q					
PRO	Licensed: No	Status: ACTIVE	Deactivate	> Advanced Search					
Write Piz				Quick Page Links					
WINCEDIZ.	Individual Contact In	Individual Contact Info							
	First Name:	Middle Name:	Last Name:	> Individual Contact Info					
Write	TEST	E	USER5	> Login Information for Website					
	Legal First Name:	Legal Middle Name:	Legal Last Name:	> Contact Primary					
	TEST	E	USER5	Location Info					
Tools	Title:	Phone Number:	Fax Number:	> Contact Attributes > Contact for Agency					
> Our Agency		111-222-3333	222-333-4444	Codes					
Information	E-mail Address:			> Submit Form					
> Our Agency Contact > + Commercial Poli Change - Manual	KIMFERRY@DONEG	ALGROU							
> VIN Lookup									
> Payment Options	Login Information fo	r Website							
> Agency EFT Authorization Form	Allow this contact to	use website? - Check the box to ALL	OW this user to use the website						
> Insured APP & RCO			ow the doct to doc the website.						
Authorization Form	^S User Name:	New Password:							
	-		CSR Incentive						
Principal Reports	Both username and pa	ssword should be 8 characters or mor	e in length. Please advise your						
> Monthly Agency	employees of their new	user name and password once creat	ed. User will have to select a new						
Experience > Monthly Direct Bill	password when they lo	gin.							
Commissions									

SELECT "Allow this contact to use website?" check box ENTER a new password CLICK "Submit Form" button at bottom of page ADVISE employee of new password;

PLEASE NOTE: For security purposes, Automation Support will not be able to reactivate agency employee logins.

Questions? Contact our Resource Center at 888-640-5840.