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## Producer Experience Portal

# Producer Experience Portal: Manage Delegate Account User Guide

### Purpose:

- The Producer Experience Portal enables Producers, General Agents (GAs), and Agencies to manage delegate users. This section covers how to activate, inactivate, and delete delegate users at will and modify delegate's access level.

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Add Delegate

Delegate List

4 items • Sorted by Type • Filtered by All contacts • Type • Updated 3 minutes ago

Search this list

| Name             | Username | State(s) | Status   | Created Date       | Start Date | End Date | Mobile Phone   | Email                |
|------------------|----------|----------|----------|--------------------|------------|----------|----------------|----------------------|
| William Jenkins  | Lorem    | IL,MT    | Active   | 7/18/2024, 7:51 AM | 8/1/2024   | 8/1/2026 | (630) 585-9807 | loremipsum@gmail.com |
| Patrick Morrison | Ipsum    | IL,MT,TX | Active   | 7/18/2024, 7:51 AM | 8/1/2024   | 8/1/2026 | (630) 585-9807 | loremipsum@gmail.com |
| Denise Nickel    | Dolor    | IL       | Inactive | 7/18/2024, 7:51 AM | 8/1/2024   | 8/1/2026 | (630) 585-9807 | loremipsum@gmail.com |
| Trudy Palmer     | Sitamet  | NM       | Inactive | 7/18/2024, 7:51 AM | 8/1/2024   | 8/1/2026 | (630) 585-9807 | loremipsum@gmail.com |

# Manage Delegate Access (Activate)

1. To activate delegate access, select **Manage Access** on the **Delegate Details** page
2. If **Active** status is selected for the Delegate Access, the **Access Start Date** is required. (Access End Date is optional)  
  
***NOTE:** The Access Start Date cannot be back-dated. The start date is defaulted to the current date but can be set to a future date. Once a start date is selected and changes are saved, the delegate will receive a verification email.*
3. Select the **State(s)** for the delegate's access. At least 1 state must be selected
4. To finalize updates, select **Save-**
  - A. A **Password Required** dialog box will open where the producer needs to enter their password
  - B. Select **Save Changes** to enforce updates
5. If you click on **Cancel-**
  - A. You will see a message: **"Are you sure you want to leave?"** with "No" and "Yes" buttons
  - B. If you select **No**, you will be redirected back to the Manage Access dialog box
  - C. If you select **Yes**, all changes will be discarded, and you will be redirected to **Delegate Details** page

The image illustrates the process of activating delegate access through a series of steps across different interface elements:

- Delegate Details Page:** Shows fields for Name, Email, Username, Registered Name, Mobile Number, Access Start Date, and State(s). A red box highlights the "Delegate Details" title.
- Manage Access Dialog:** Contains options for "Active" or "Inactive" status, "Access Start Date" and "Access End Date (optional)" fields, and a "State(s)" dropdown menu. A red box highlights the "Manage Access" button.
- Password Required Modal:** Prompts the user to enter a password to save changes. A red box highlights the "Password" input field.
- Confirmation Dialog:** Asks "Are you sure you want to leave?" with "No" and "Yes" buttons. A red box highlights the "Are you sure you want to leave?" message.

Numbered callouts indicate the sequence of actions:

1. Click "Manage Access" on the Delegate Details page.
2. In the Manage Access dialog, select "Active", set an "Access Start Date", and choose "State(s)".
3. Click "Save" in the Manage Access dialog.
4. In the Password Required modal, enter a password and click "Save Changes".
5. In the confirmation dialog, click "No" to return to the Manage Access dialog or "Yes" to return to the Delegate Details page.

# Manage Delegate Access (Inactivate)

1. If you need to disable a Delegate's access temporarily, you can update their profile to **Inactive** status-

A. Select **Save**

B. A **Password Required** dialog box will open where the producer needs to enter their password

C. Select **Save Changes**

**NOTE:** If an incorrect password is entered when updating Delegate access details, the user will get the following message:

*"The password you entered was not recognized. Please try again. Your account will be locked after 5 failed attempts and will be unlocked automatically after 30 minutes."*

2. You will see a message confirming the Delegate User was inactivated. The message should state **"Your information update is processing. Please wait for few minutes for the changes to reflect on the page."**

3. The Delegate Access status will display as **Inactive** on the Delegate Details page and the Delegate will no longer be able to access their account.

Manage Access

\*Delegate Access

1

☐ Active

☒ Inactive

1A

Save

Password Required

1B

To save changes, Please enter your password.

\* Password

.....

1C

Save Changes

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✓ Your information update is processing. Changes should appear within a few minutes (up to 5 minutes). ✕

Delegate Details

Delete Delegate

Manage Access

Name

William Jenkins

Email

wjenkins95@gmail.com

Username

Wjenkins1

Mobile Number

(639) 989-1215

Registered Name

John Doe

3

Delegate Access

Inactive

Access Start Date

01/01/2025

Access End Date

01/01/2026

State(s)

IL;TX;OK;

Info Change Password Modal

✕

Password Required

NOTE

✕ The password you entered was not recognized. Please try again. Your account will be locked after 5 failed attempts and will be unlocked automatically after 30 minutes.

To save changes to the delegate's information, please enter your password.

\*Password

Previous

Save Changes

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# Manage Delegate Access (Delete)

- 1. If you need to permanently remove access for a delegate, select **Delete Delegate** from the **Delegate Details** page
  - 2. A **Password Required** dialog box will open where the user needs to enter their password
    - A. After entering their password, the user selects **Yes, Delete**
    - B. User will get a prompt to confirm the deletion of the Delegate, and that the deletion cannot be undone. The user will select **Yes, Delete**
  - 3. When a correct password is entered, a message displays confirming **Delegate was deleted successfully**. The delegate is now removed from **My Delegate** list
- NOTE:** Once delegate is deleted, they will NOT appear on the My Delegates list and the Delegate will not be able to log in.

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Delegate Details

1

Delete Delegate

Manage Access

Name

William Jenkins

Email

wjenkins95@gmail.com

Username

Wjenkins1

Mobile Number

(639) 989-1215

Registered Name

John Doe

Delegate Access

Active

Access Start Date

01/01/2025

Access End Date

01/01/2026

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✓ Delegate was deleted successfully ✕

Delegate List

4 items • Sorted by Type • Filtered by All contacts • Type • Updated 3 minutes ago

Name

Username

State(s)

Status

Created Date

Start Date

End Date

Mobile Phone

Email

Patrick Morrison

Ipsium

IL,MT,TX

Active

7/18/2024, 7:51 AM

8/1/2024

8/1/2026

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7/18/2024, 7:51 AM

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Sitamet

NM

Inactive

7/18/2024, 7:51 AM

8/1/2024

8/1/2026

(630) 585-9807

loremipsum@gmail.com

Password Required

Enter your password to delete delegate, William Jenkins. This action cannot be undone

\*Password

2A

Yes, Delete

Delete Delegate

Are you sure you want to delete delegate, William Jenkins?

This action cannot be undone

2B

Yes, Delete

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