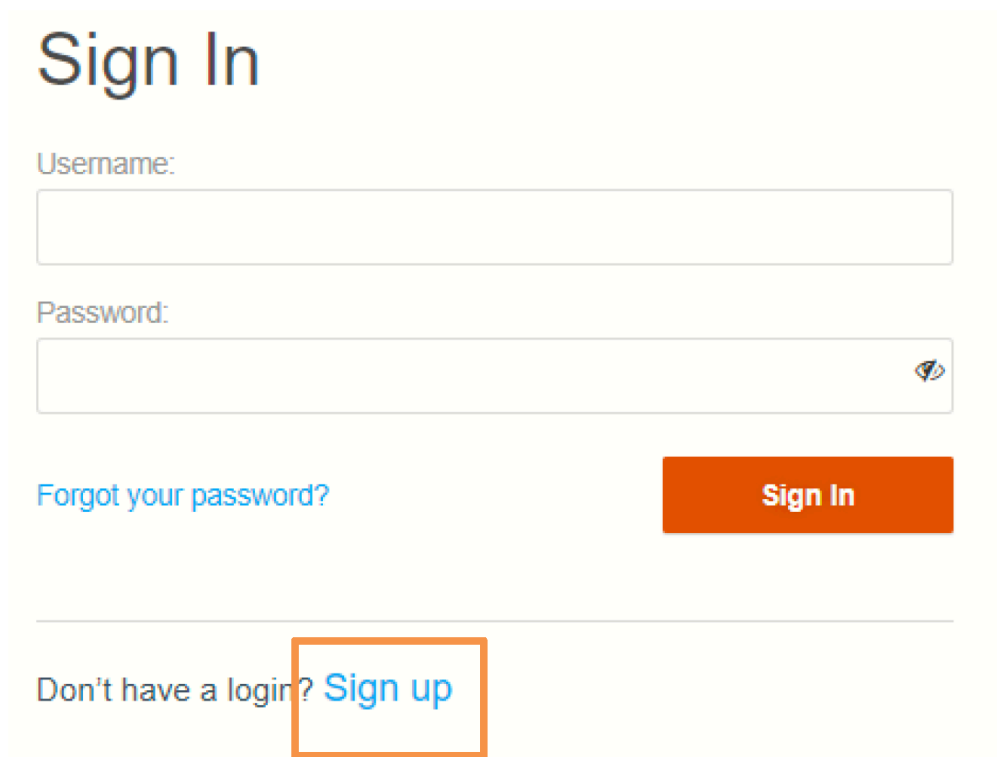


## Registration

To register as a policyholder on the CopperPoint system, three pieces of information will be needed: Account Number, Policy Number, FEIN (Tax ID).

With these, go to copperpoint.com and select Customer Login to be taken to this screen:



The screenshot shows the 'Sign In' page. At the top, the heading 'Sign In' is displayed in a large, dark blue font. Below the heading are two input fields: 'Username:' followed by a white text box, and 'Password:' followed by a white text box with a small eye icon on the right side. To the left of the 'Sign In' button is a blue link that says 'Forgot your password?'. The 'Sign In' button is a solid orange rectangle with the text 'Sign In' in white. Below a horizontal line, the text 'Don't have a login?' is followed by a blue link 'Sign up' which is highlighted with an orange rectangular border.

If you do not already have an account, select the “Sign up” link at bottom.

Complete the registration information (first name, last name, email, password) on the next screen. When these password requirements at bottom below are fulfilled, the Next button will be orange. You may use the eye icon to view your typed password before hitting Next.

## Sign Up

First Name:

Last Name:

Email:

Password:



Next

Already have a login?

[Sign In](#)

**The password must contain at least:**

- 8 characters
- One uppercase character
- One lowercase character
- One number
- One special character (~!@#\$%^&\* \_-+=)

On the next screen, when the required account information is entered, the Sign Up button will turn orange.

## Enter Your Details

Please provide verification information for the account you wish to access. To register with CopperPoint, please enter your Tax ID and one of the following:

- Account Number
- Policy Number

For assistance with registration, please call 1-800-231-1363.

FEIN ##-##### or SSN ###-##-####

Account Number

Policy Number

[Cancel](#)

[Sign Up](#)

The system will then refresh to the CopperPoint CustomerEngage homepage. The first registered user is automatically an account administrator with access to the User Administration tab. User admins can add, remove, and modify other users, including other administrators.

## User Administration

Click on the User Administration tab to **add a new user**. Users will need the Account Admin permission to use this page.

After clicking the orange +Add New User button, the email address of the new user will need to be entered. Any email address can be used, as long as it has not been registered with any other account.

### Add New User

Email:

willie.mcgee1982@mailinator.com

Cancel

Add User

Complete the user's name and add appropriate permissions for the user by clicking the Grant button next to each authority profile. All users have the Basic profile by default, and Account Admin users inherit all other profiles.

Role	Description
<b>Policy</b>	View policy details and documents, create certificates of insurance
<b>Billing</b>	Make payments on account, view invoices
<b>Claims</b>	File a notice of loss, read claim adjuster notes, download claim reports
<b>Payroll Reporting</b>	Enter payroll reports, view payroll documents
<b>Account Admin</b>	Add and remove users, change user permissions

After adding users, a blue confirmation message will appear, and the users will receive an email inviting them to establish an account password.

**To remove a user**, click the Remove button on the User Administration page next to the listed name. An admin can remove any other user.

**To change permissions of any user**, click on the View Details link next to the user's name. On the Authorized User Details page that opens, the top section will display authorities granted for that user. Use the Remove button to remove a permission. The bottom section will list authorities that the user does not currently hold; click the Add button to include the authority within the user's profile.