

## Registration

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To register as a policyholder on the CopperPoint system, two pieces of information will be needed: Account Number and Policy Number.

With these, go to [ce.copperpoint.com](https://ce.copperpoint.com) to be taken to this screen:

### Sign In

Username:

Password:

\* ☐ I agree to CopperPoint's [Terms & Conditions](#)

[Forgot your password?](#)

Sign In

Don't have a login?

[Sign up](#)

[Legal & Privacy](#)

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 the 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.

On the next page, enter your account number and policy number, found on your policy or billing documents. The account number will begin with 50000-, and the policy number will begin with 10-. (For registration with accounts or policies with different numbers, please contact Customer Support.)

# Enter Your Details

Please provide verification information for the account you wish to access. To register with CopperPoint, Please enter the following:

Account Number

50000#####

Policy Number

10#####

Cancel

Sign Up

If you do not have all the information above, contact CopperPoint at 800.231.1363 to request help creating a Customer Portal Login.

The system will then refresh to the CopperPoint CustomerEngage login page. 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.

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
Policy	View policy details and documents, create certificates of insurance.
Billing	Make payments, view invoices, enroll in AutoPay
Claims	File a notice of loss, read claim adjuster notes, download claim reports
Payroll Reporting	Enter payroll reports, view payroll documents
Account Admin	Add and remove users, change user permissions

## Electronic Notifications

Users with the Account Admin permission can enable these notifications for each user via the User Administration tab. Signing up to receive notifications will enable all available account event notifications.

Signing up to receive notifications will enable <b><u>all</u></b> available account event notifications.	Billing invoice is ready
	Billing invoice is unpaid and due soon
	Account/Policy document has been posted
	Payroll report is unfinished and due soon

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.