

Agency User Administration

Last Updated February 1, 2022

Agencies can now manage Portal access to their producer codes. Users with the Agency Admin permission can add, remove, and modify users. The CopperPoint Portal allows for customization of access based on roles and producer codes/branch locations.

Available Roles	Description
CSR*	Add this user to the list of Account Managers that can be assigned to Accounts/Submissions.
Producer*	Add this user to the list of Licensed Producers that can be assigned to Accounts/Submissions.
Portal Access	Grants the user access to the CopperPoint Portal. Includes policy/account, billing, and claims access under the assigned producer codes.
Commissions	Portal Access + Grants access to view/download commission statements
Agency Admin	Portal Access + Ability to add, remove, and modify Portal users for the assigned producer codes.

*The CSR and Producer roles do not give Portal access unless the user is also assigned Portal Access.

Locations/Producer codes

The CopperPoint Portal allows customization of access based on your agency's producer codes/branch locations. Portal users will only be able to access Accounts/Policies that are under their assigned producer codes. However, users can be given access to one, a custom combination, or all producer codes associated with your organization.

Add a New User

1. Navigate to the User Admin tab in the CopperPoint Portal
2. In the upper-right corner, select Add New User



+ Add New User

4. Fill in the user's name and email address.
5. Select the Add Role button next to each role the user should have.
6. Select the Add Location next to each location/producer code the user should have or the Add All Locations button to add all available locations.
7. Select Add User at the bottom to complete the process. If user is given Portal Access, they will receive a Portal registration email shortly.

**If a user is having trouble logging in and/or they are unable to reset their password, please try removing them and re-adding them to the Portal.

Modifying Users

1. Navigate to the User Admin tab in the CopperPoint Portal.
2. Select the Edit link to the right of the desired user.



Edit

3. Adjust roles, locations, and notifications.
4. Select Done at the bottom of the page. If the user is given Portal access, they will receive a Portal registration email shortly.

Removing Users

1. Navigate to the User Admin tab in the CopperPoint Portal.
2. Select the Remove link to the right of the desired user.



Remove

Download a List of All Users

1. Navigate to the User Admin tab in the CopperPoint Portal.
2. Select the Export user list link in the upper-right corner.

[Export user list](#)

Electronic Notifications

Agents now have the option to receive various notifications for all policies under their respective producer codes. Users with Agency Admin permissions can turn on these notifications for their users via editing a user. These notifications can be also opted into by the individual user via their My Profile tab inside the CopperPoint Portal.

Invoice Reminder	An invoice is unpaid and due soon
Invoice Ready	An invoice has been billed and is ready
Notice of Cancellation	A Notice of Cancellation has been generated
Payroll Reminder	A Payroll report is unfinished and due soon

If your company has an email filter/firewall you may need to allow emails from PortalAdmin@copperpoint.com.