Using the ‘User Admin’ function on the Agile Broker Portal

Purpose:

This tutorial explains how to use the ‘User Admin’ feature on the new Agile Broker Portal. This is special access that can be granted to a few individuals from each brokerage. From there, they can manage other user accounts within their organization to use the Broker Portal.

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1. Log into the Agile Broker Portal, click on the right-upper corner (*padlock icon*) and click **<User admin>.**

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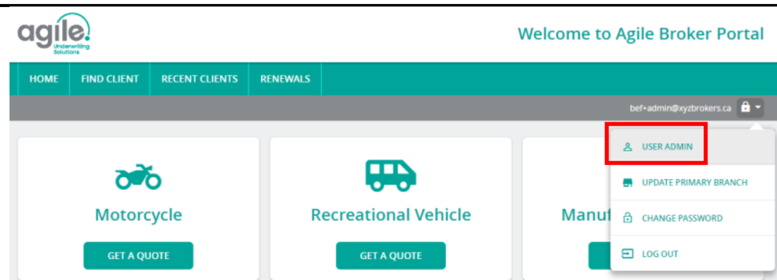

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2. The existing users and their status will be displayed on this page.

3. To update an existing user account, go to **step 6**.

4. To create a new user account, click **<Add user>**.

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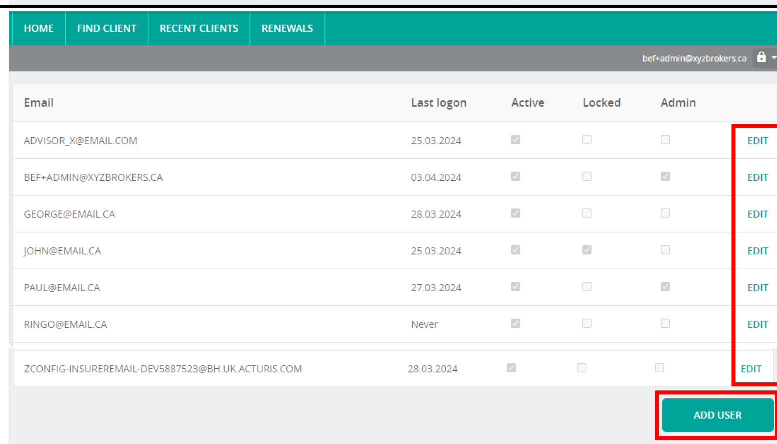

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5. Enter the advisor’s **email address** and **“Active = Yes”**. If this person also needs to have ADMIN access for managing other accounts, check “Admin user = Yes”. Then, click **<Add>**.

6. The person will receive an email to complete the sign-up process and log onto the portal.

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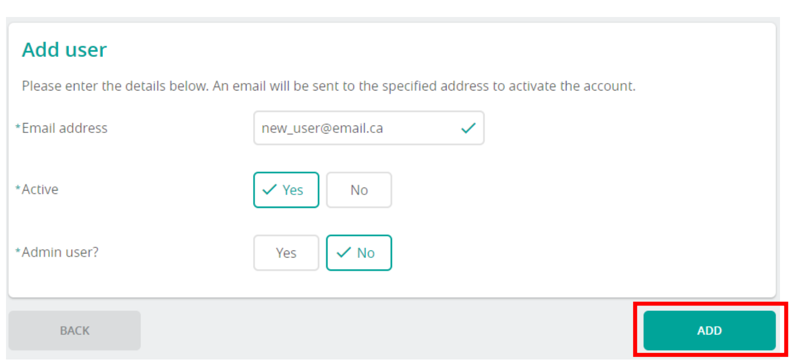

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7. If you need to **change an existing user account**, locate the corresponding line and click on **<Edit>**. 8. Make the necessary changes and click **<Update>** to save. The parameters are: **Active:** Determines if the account is enabled. Marking "No" will completely remove the access and can only be reactivated by an admin. **Locked:** Marking "Yes" forces the user to go through the account validation steps and resets the password. **Admin user:** Allows access to manage other user accounts within the organization.