

# How To Add A New Agent In PriscaTech



This guide provides a straightforward process for adding a new agent in PriscaTech, ensuring users can efficiently manage their agency's personnel.

## 1 Start from your Dashboard in PriscaTech and Click "Agencies"

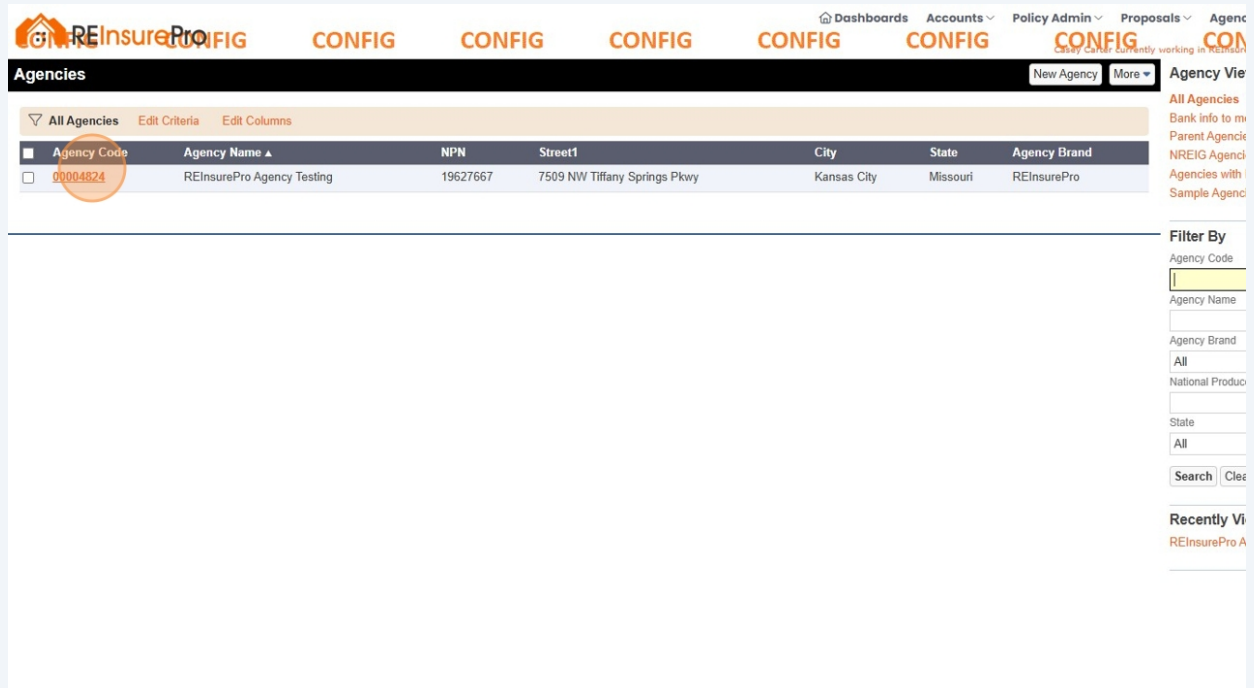
A screenshot of the PriscaTech dashboard. The top navigation bar includes links for Dashboards, Accounts, Policy Admin, Proposals, Agency Admin, and Reports. The 'Agency Admin' link is highlighted with an orange circle. Below the navigation bar, the main content area is divided into several sections. On the left, there is a 'New Application' button. In the center, there is a table titled 'Progress' with columns for Application Member Name, Entry Date, Agency, Agent, and Entry User. On the right, there is a section titled 'Applications this Year' and another titled 'My Open Endorsements' with columns for Endorsement Number, Account, Billing Account, and Endorsement Type. The 'My Open Endorsements' section shows 0 to 0 of 0 items.

Application Member Name	Entry Date	Agency	Agent	Entry User
None	05/12/2025	REInsurePro Agency Testing	Casey Carter	Matt Lanning

Application Member Name	Type	Status
Realty Group I LLC	Application	New
Realty Group I LLC	Application	Submitted
Building Trust LLC	Application	Submitted

Endorsement Number	Account	Billing Account	Endorsement Type
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## 2 Select your agency code



**REInsurePro** CONFIG CONFIG CONFIG CONFIG CONFIG CONFIG CONFIG CONFIG

**Agencies** New Agency More Agency View

▼ All Agencies Edit Criteria Edit Columns

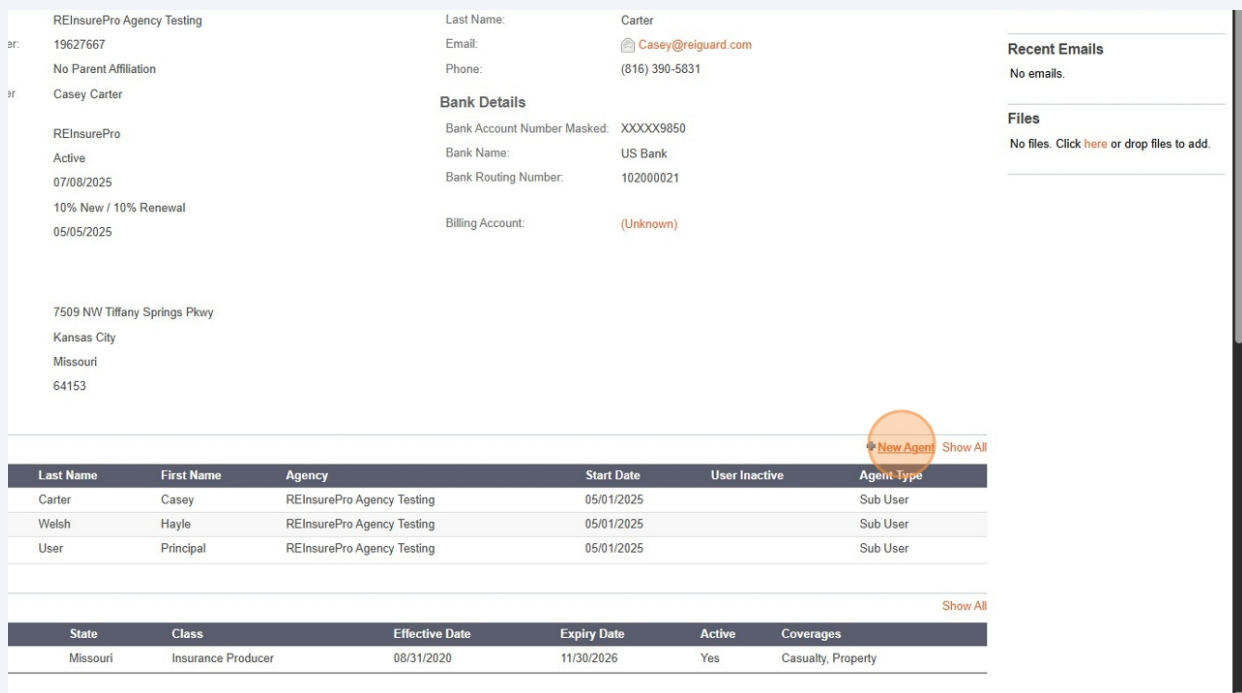
Agency Code	Agency Name	NPN	Street1	City	State	Agency Brand
00004824	REInsurePro Agency Testing	19627667	7509 NW Tiffany Springs Pkwy	Kansas City	Missouri	REInsurePro

**Filter By**

Agency Code  
 Agency Name  
 Agency Brand  
 All  
 National Product  
 State  
 All  
 Search Clear

**Recently Viewed**  
 REInsurePro A

## 3 Click "New Agent" and continue entering the agents information.



REInsurePro Agency Testing  
 19627667  
 No Parent Affiliation  
 Casey Carter  
 REInsurePro  
 Active  
 07/08/2025  
 10% New / 10% Renewal  
 05/05/2025  
 7509 NW Tiffany Springs Pkwy  
 Kansas City  
 Missouri  
 64153

Last Name: Carter  
 Email: Casey@reiguard.com  
 Phone: (816) 390-5831

**Bank Details**  
 Bank Account Number Masked: XXXXX9850  
 Bank Name: US Bank  
 Bank Routing Number: 102000021  
 Billing Account: (Unknown)

**Recent Emails**  
 No emails.

**Files**  
 No files. Click [here](#) or drop files to add.

[New Agent](#) Show All

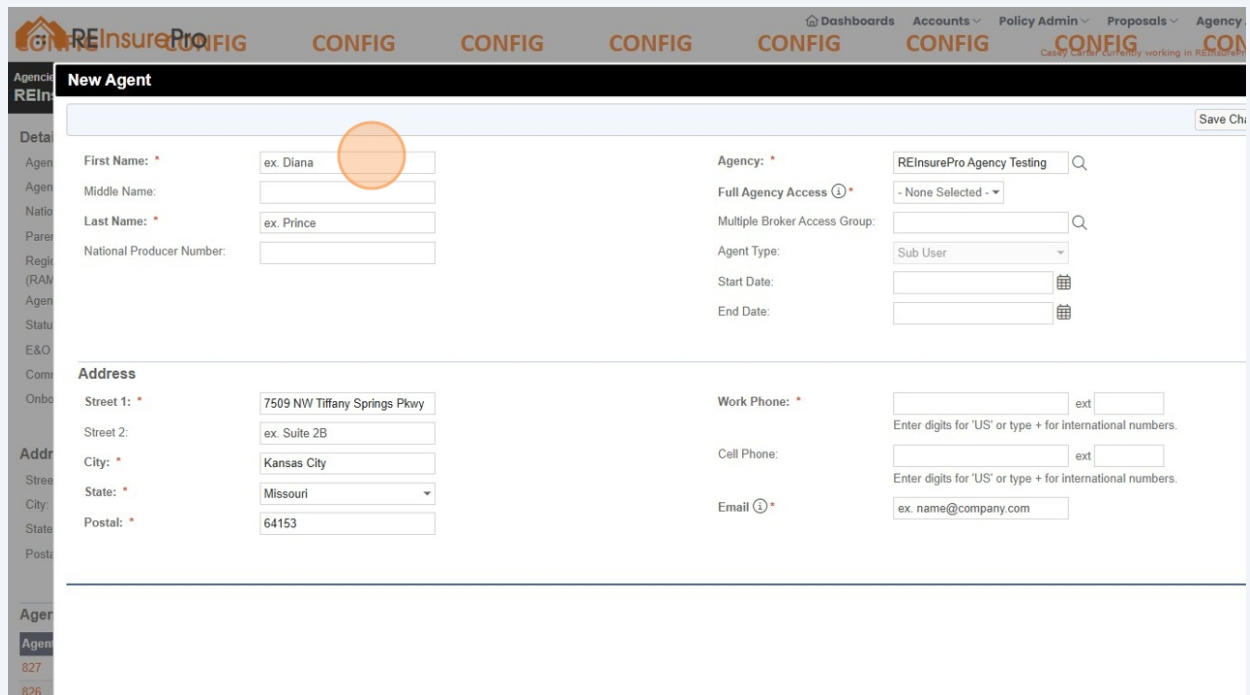
Last Name	First Name	Agency	Start Date	User Inactive	Agent Type
Carter	Casey	REInsurePro Agency Testing	05/01/2025		Sub User
Welsh	Hayle	REInsurePro Agency Testing	05/01/2025		Sub User
User	Principal	REInsurePro Agency Testing	05/01/2025		Sub User

Show All

State	Class	Effective Date	Expiry Date	Active	Coverages
Missouri	Insurance Producer	08/31/2020	11/30/2026	Yes	Casualty, Property

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Start with the name and continue to enter all required information with the red asterisk



**REinsurePro** CONFIG CONFIG CONFIG CONFIG CONFIG CONFIG CONFIG CONFIG CONFIG

Agency: REinsurePro

**New Agent** Save Changes

First Name: \* ex. Diana

Middle Name:

Last Name: \* ex. Prince

National Producer Number:

Agency: \* REinsurePro Agency Testing

Full Agency Access ⓘ \* - None Selected -

Multiple Broker Access Group:

Agent Type: Sub User

Start Date:

End Date:

**Address**

Street 1: \* 7509 NW Tiffany Springs Pkwy

Street 2: ex. Suite 2B

City: \* Kansas City

State: \* Missouri

Postal: \* 64153

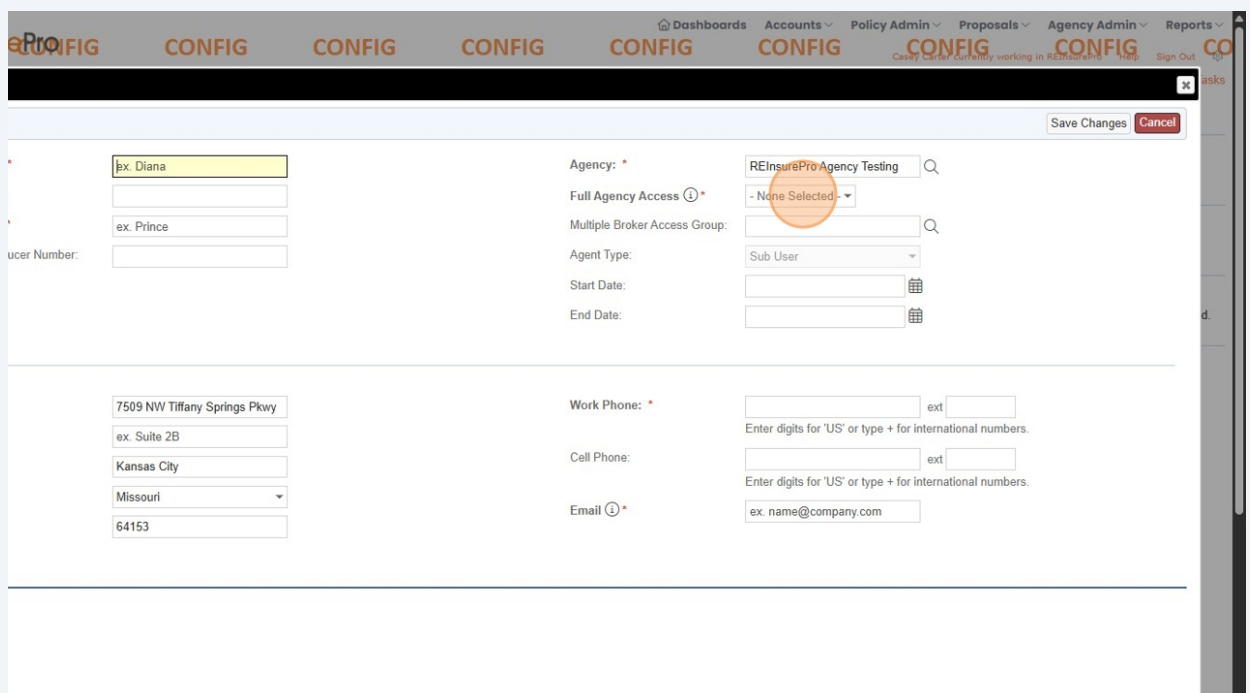
Work Phone: \* ext.

Cell Phone: ext.

Email ⓘ \* ex. name@company.com

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This particular dropdown is "Full Agency Access". What this function does is allow you to manage your agency security. If an agent is set to Full Agency Access "Yes" they can see all proposals and policies within your agency. If an agent is set to Full Agency Access "No" they will only see their own proposals and policies.



**REinsurePro** CONFIG CONFIG CONFIG CONFIG CONFIG CONFIG CONFIG CONFIG CONFIG

Agency: REinsurePro

**New Agent** Save Changes Cancel

First Name: \* ex. Diana

Middle Name:

Last Name: \* ex. Prince

National Producer Number:

Agency: \* REinsurePro Agency Testing

Full Agency Access ⓘ \* - None Selected -

Multiple Broker Access Group:

Agent Type: Sub User

Start Date:

End Date:

**Address**

Street 1: \* 7509 NW Tiffany Springs Pkwy

Street 2: ex. Suite 2B

City: \* Kansas City

State: \* Missouri

Postal: \* 64153

Work Phone: \* ext.

Cell Phone: ext.

Email ⓘ \* ex. name@company.com

## 6 Select the start date for your agent.

Pro CONFIG CONFIG CONFIG CONFIG CONFIG CONFIG CONFIG CONFIG CONFIG

Save Changes Cancel

ex. Diana

ex. Prince

User Number:

7509 NW Tiffany Springs Pkwy

ex. Suite 2B

Kansas City

Missouri

64153

Agency: \* REInsurePro Agency Testing

Full Agency Access ① \* - None Selected -

Multiple Broker Access Group:

Agent Type: Sub User

Start Date:

End Date:

Work Phone: \* ext.

Enter digits for 'US' or type + for international numbers.

Cell Phone: ext.

Enter digits for 'US' or type + for international numbers.

Email ① \* ex. name@company.com

## 7 Click "Save Changes". After they are added, your agent will receive an email with their login.

Pro CONFIG CONFIG CONFIG CONFIG CONFIG CONFIG CONFIG CONFIG CONFIG

Save Changes Cancel

ex. Diana

ex. Prince

User Number:

7509 NW Tiffany Springs Pkwy

ex. Suite 2B

Kansas City

Missouri

64153

Agency: \* REInsurePro Agency Testing

Full Agency Access ① \* - None Selected -

Multiple Broker Access Group:

Agent Type: Sub User

Start Date:

End Date:

Work Phone: \* 64153

Cell Phone: 64153

Email ① \* ex. name@company.com

Calendar: Jul 2025

Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2