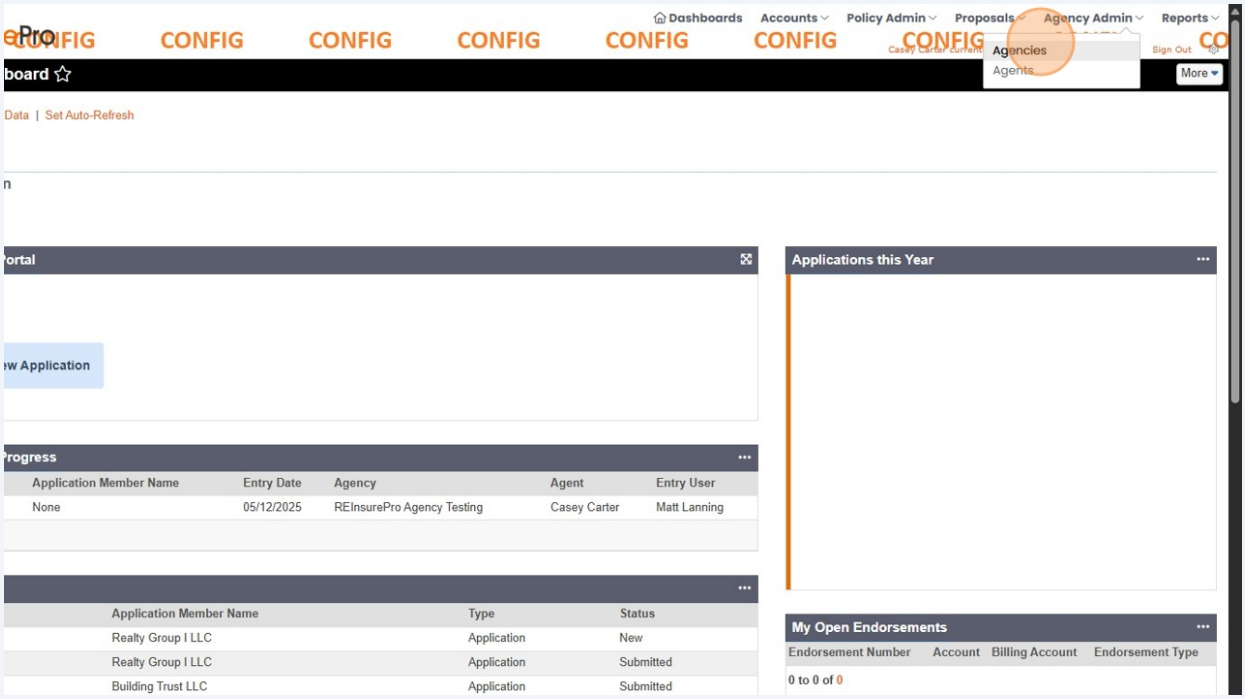
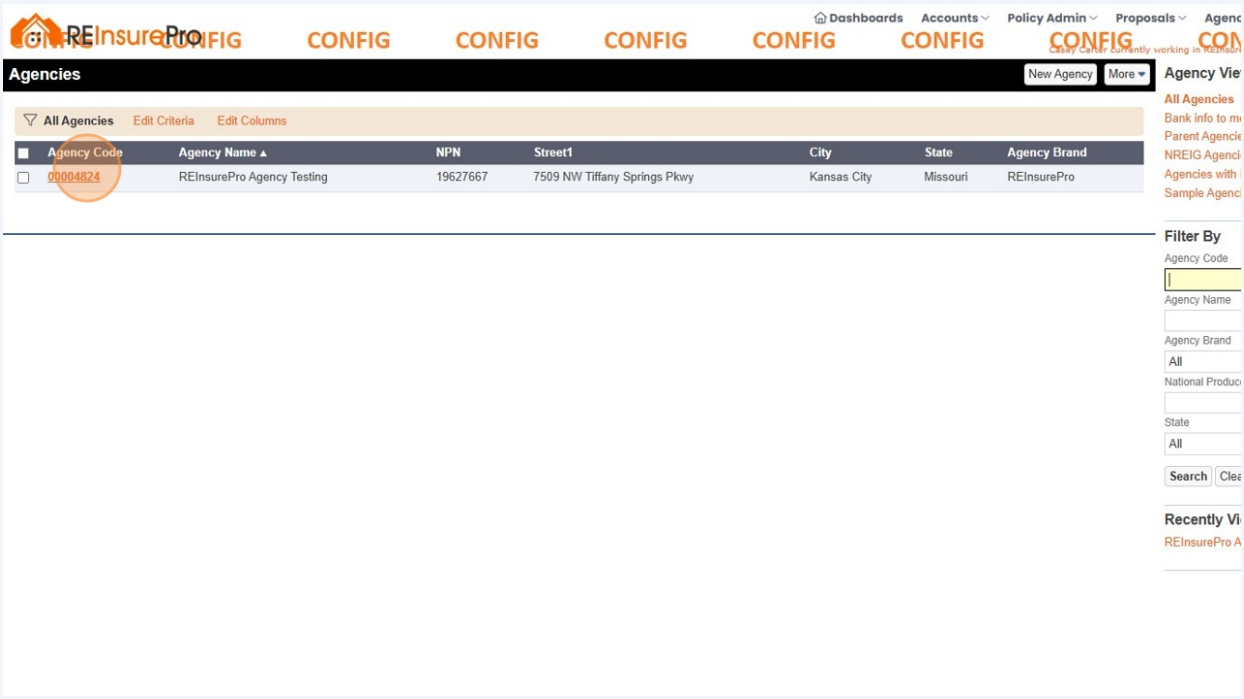
How To Add A New Agent In PriscaTech

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

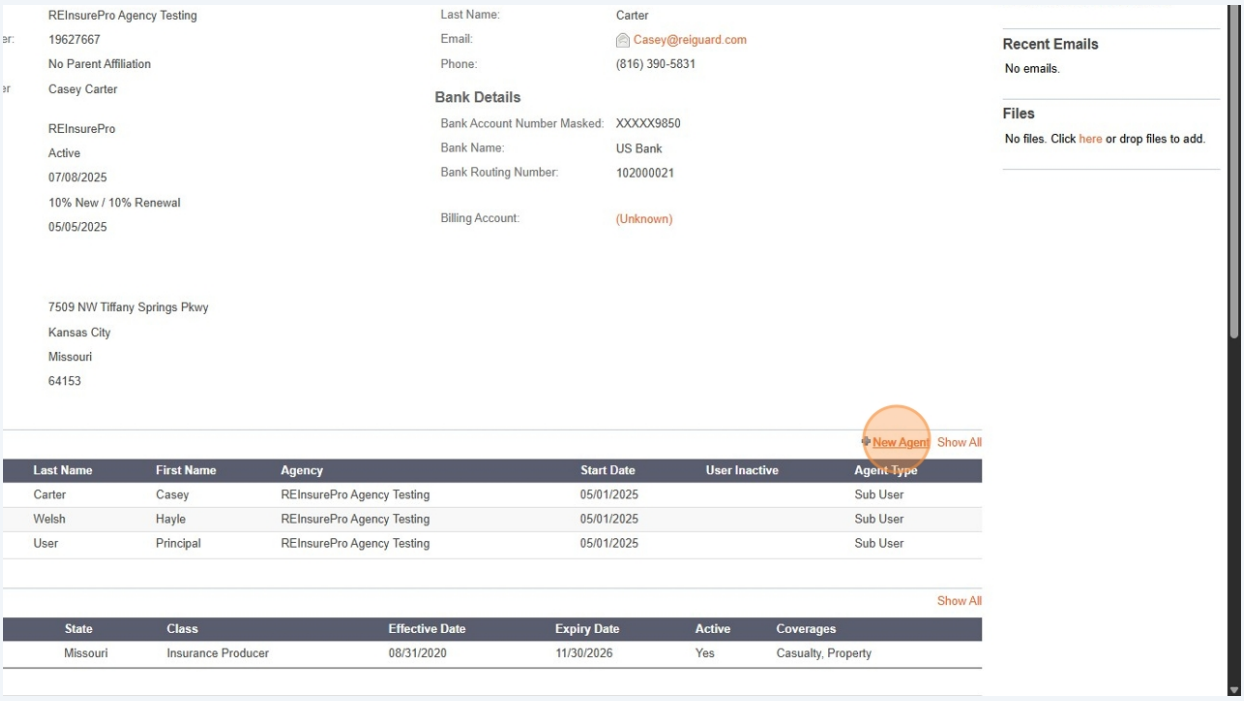
1 Start from your Dashboard in PriscaTech and Click "Agencies"



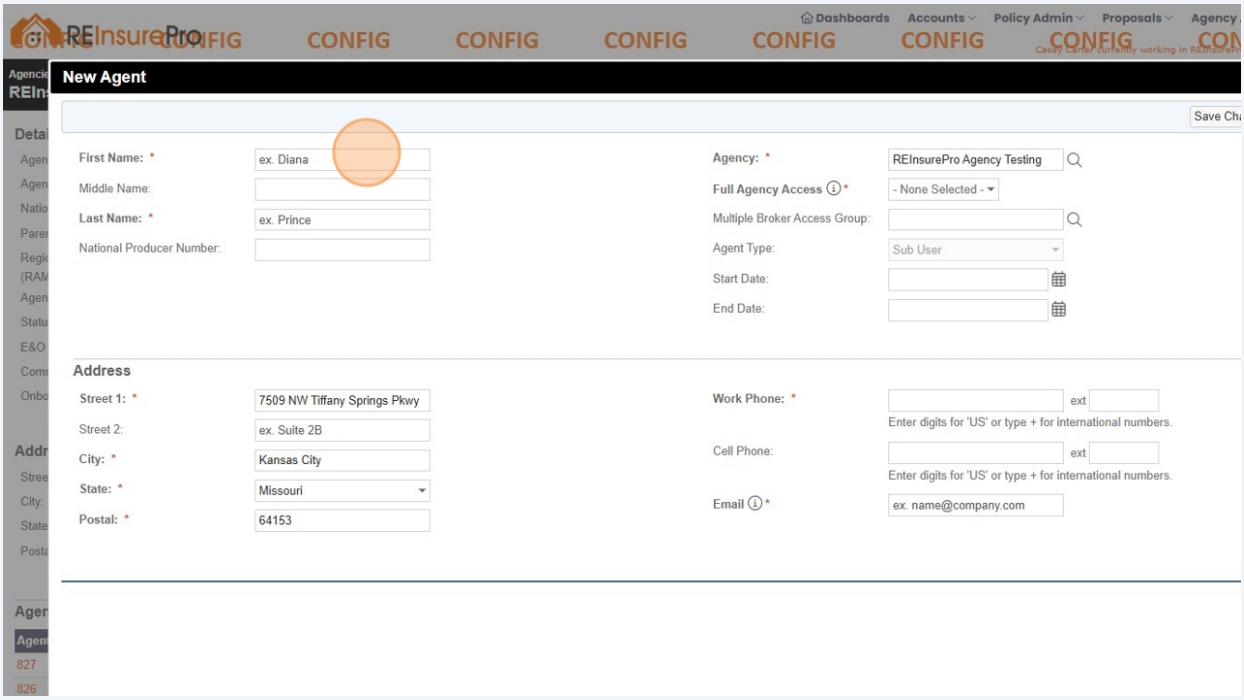
2 Select your agency code



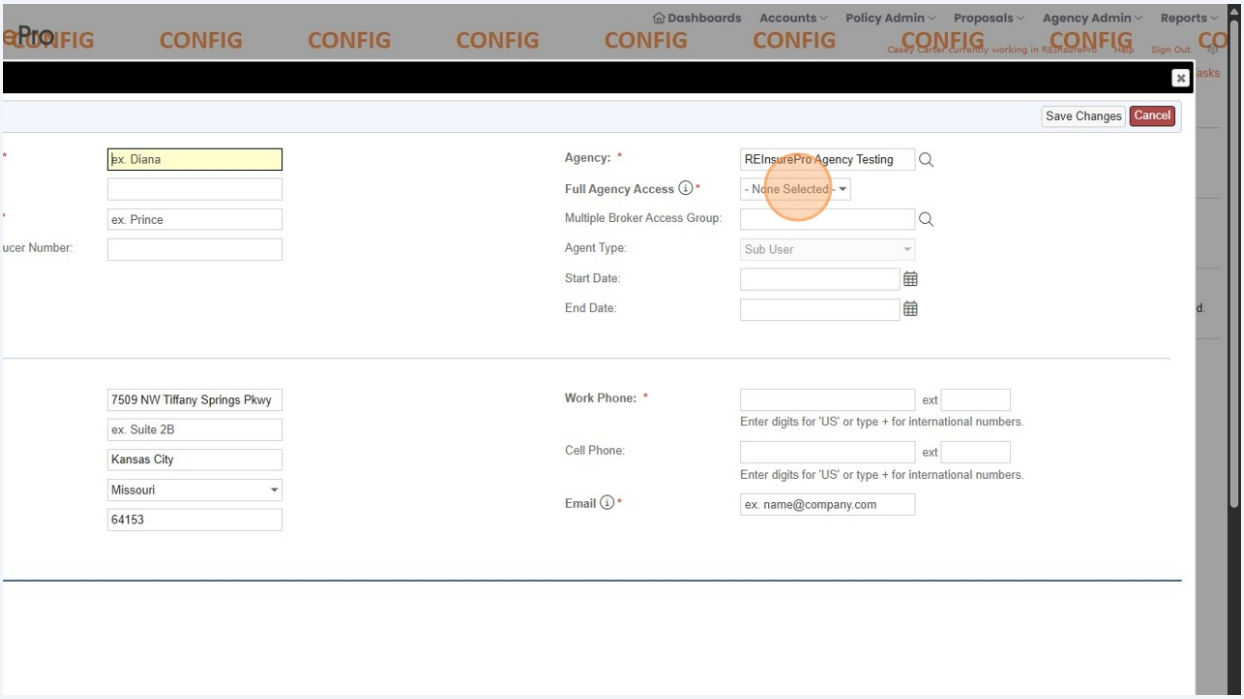
3 Click "New Agent" and continue entering the agents information.



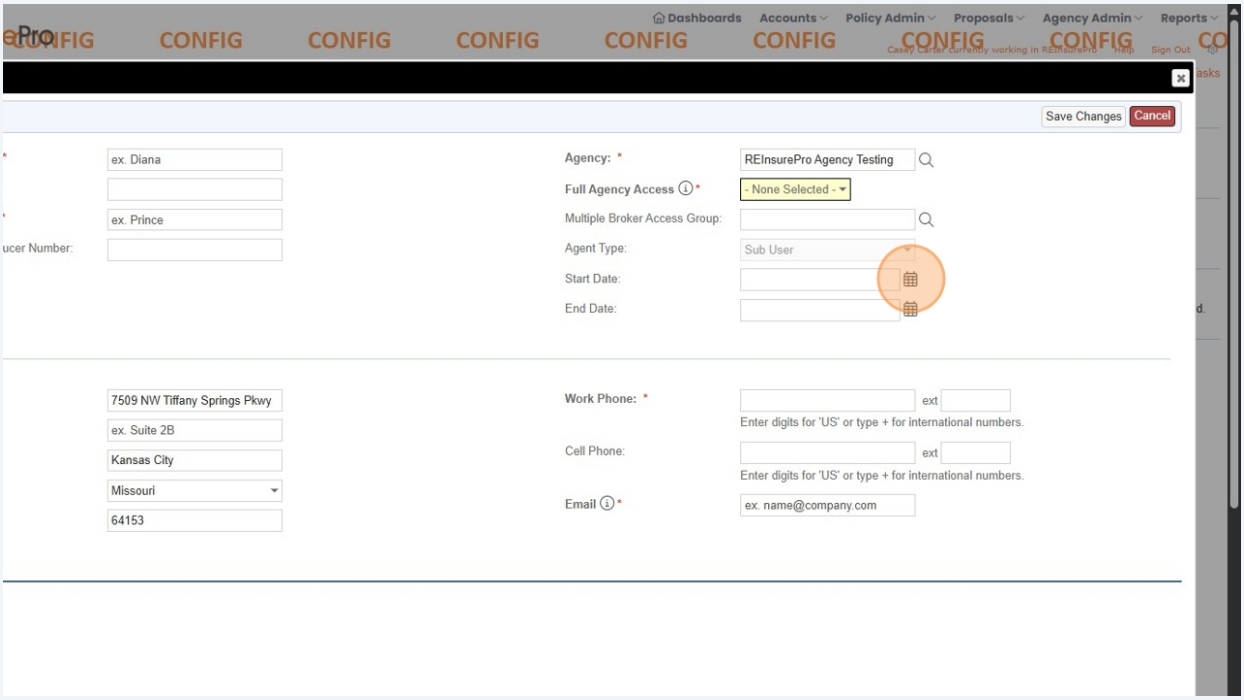
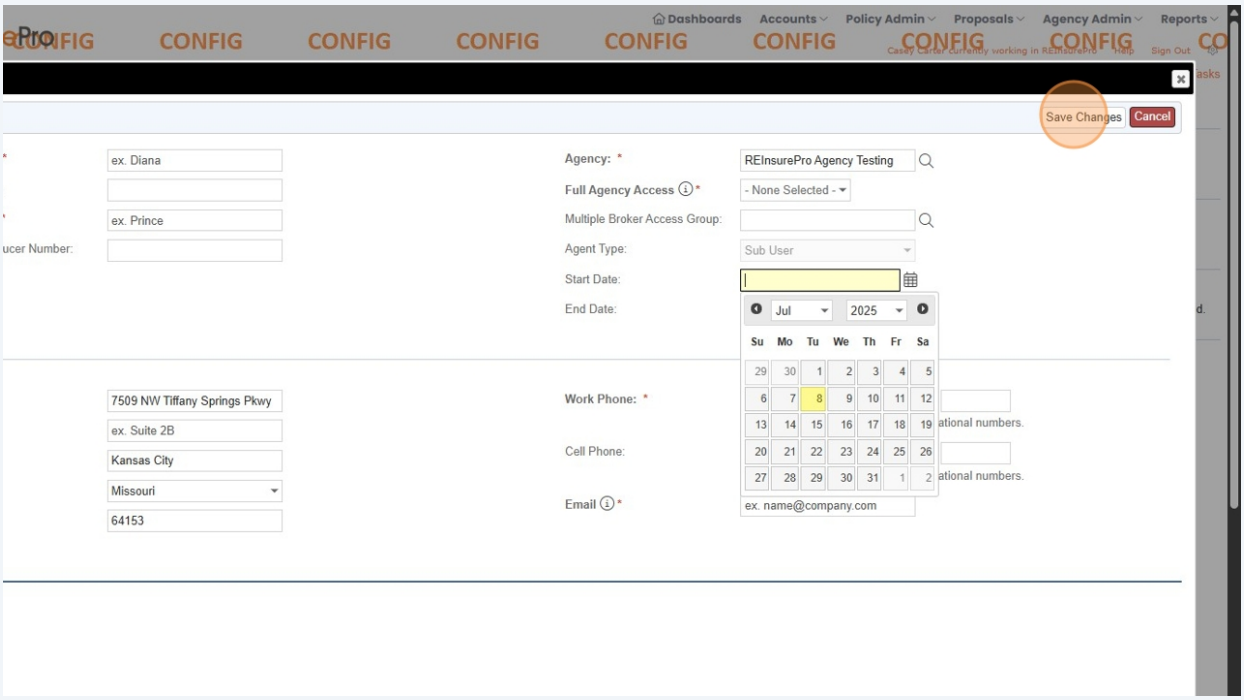
4 Start with the name and continue to enter all required information with the red asterisk



5 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.



6 Select the start date for your agent.



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