

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"

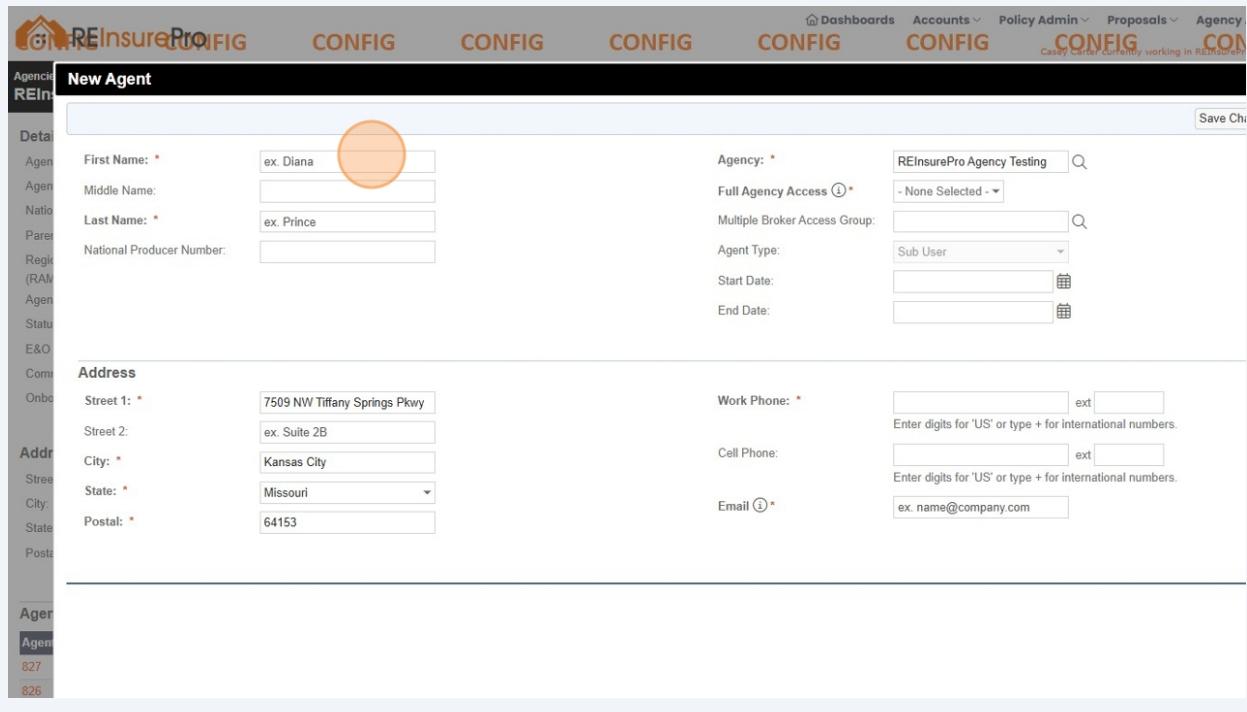
The screenshot shows the PriscaTech dashboard with a navigation bar at the top. The 'Agencies' menu item is highlighted with a red circle. Below the navigation bar, there are several cards: 'New Application' (highlighted with a blue box), 'Progress' (showing one entry for 'None' with 'Entry Date' 05/12/2025, 'Agency' REInsurePro Agency Testing, 'Agent' Casey Carter, and 'Entry User' Matt Lanning), 'Applications this Year' (empty), and 'My Open Endorsements' (empty).

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



New Agent

Address

First Name: * ex. Diana

Middle Name:

Last Name: * ex. Prince

National Producer Number:

Agency: * REInsurePro Agency Testing

Full Agency Access ① * - None Selected -

Multiple Broker Access Group:

Agent Type: Sub User

Start Date:

End Date:

Street 1: * 7509 NW Tiffany Springs Pkwy

Street 2: ex. Suite 2B

City: * Kansas City

State: * Missouri

Postal: * 64153

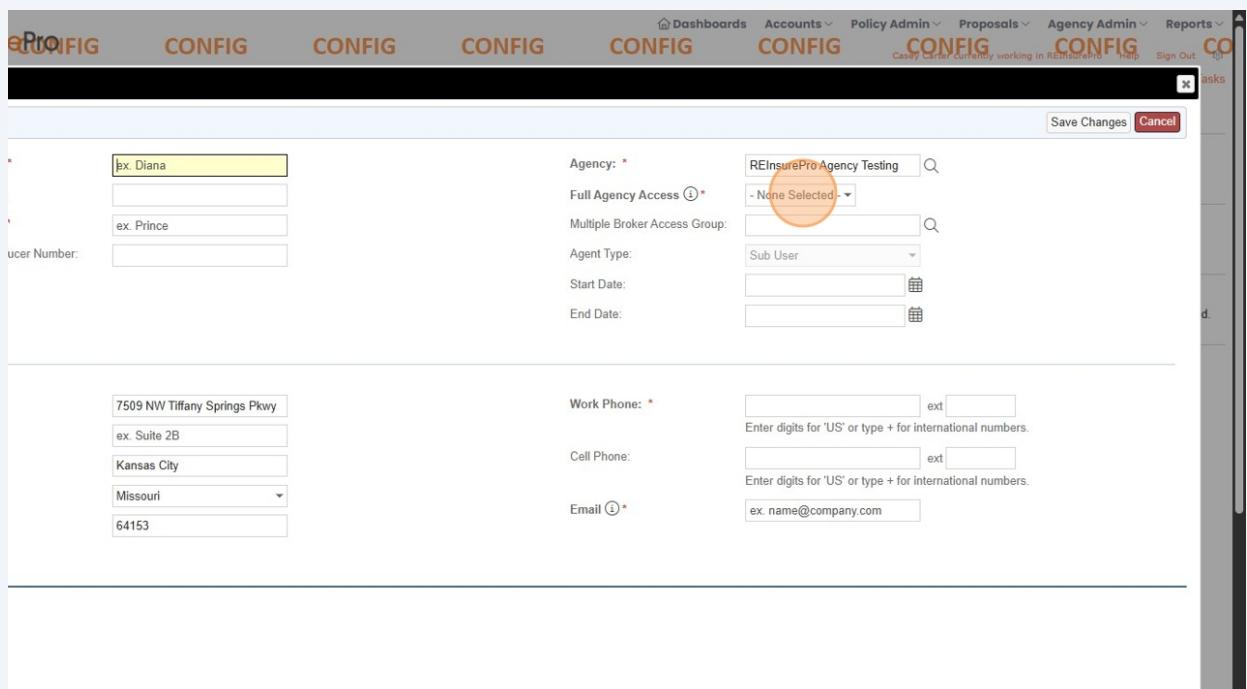
Work Phone: * [] ext []

Cell Phone: [] ext []

Email ① * ex. name@company.com

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.



New Agent

Address

First Name: * ex. Diana

Middle Name:

Last Name: * ex. Prince

National Producer Number:

Agency: * REInsurePro Agency Testing

Full Agency Access ① * - None Selected -

Multiple Broker Access Group:

Agent Type: Sub User

Start Date:

End Date:

Street 1: * 7509 NW Tiffany Springs Pkwy

Street 2: ex. Suite 2B

City: * Kansas City

State: * Missouri

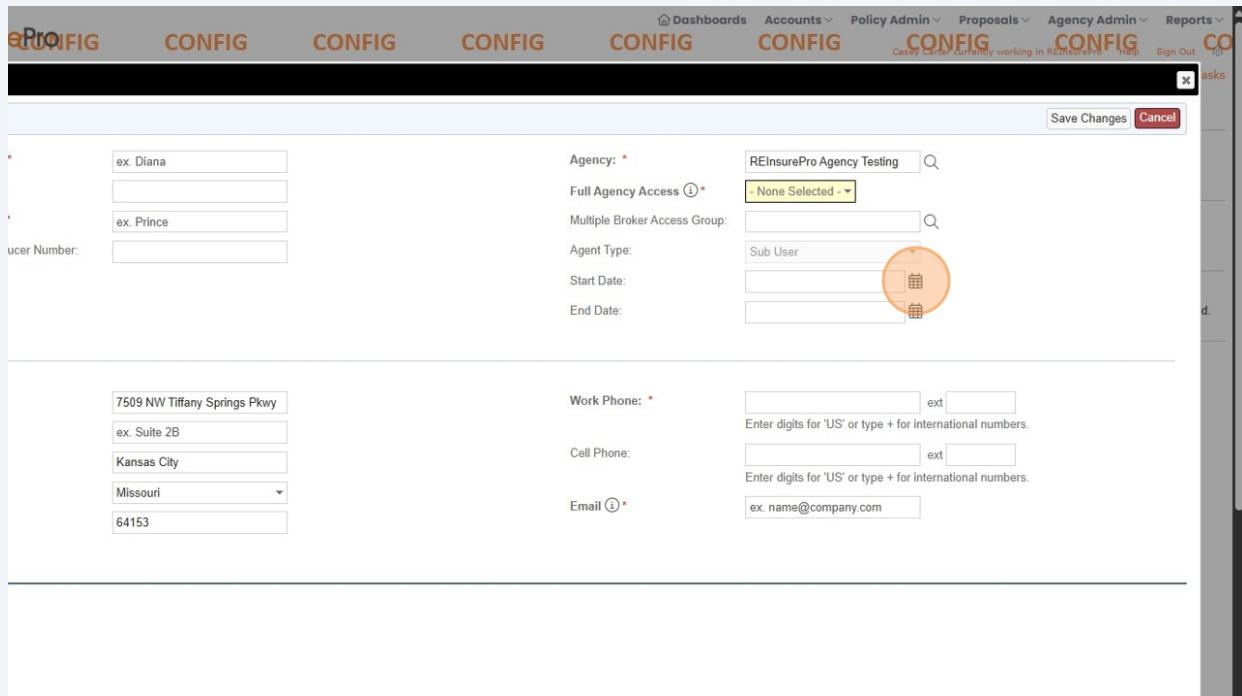
Postal: * 64153

Work Phone: * [] ext []

Cell Phone: [] ext []

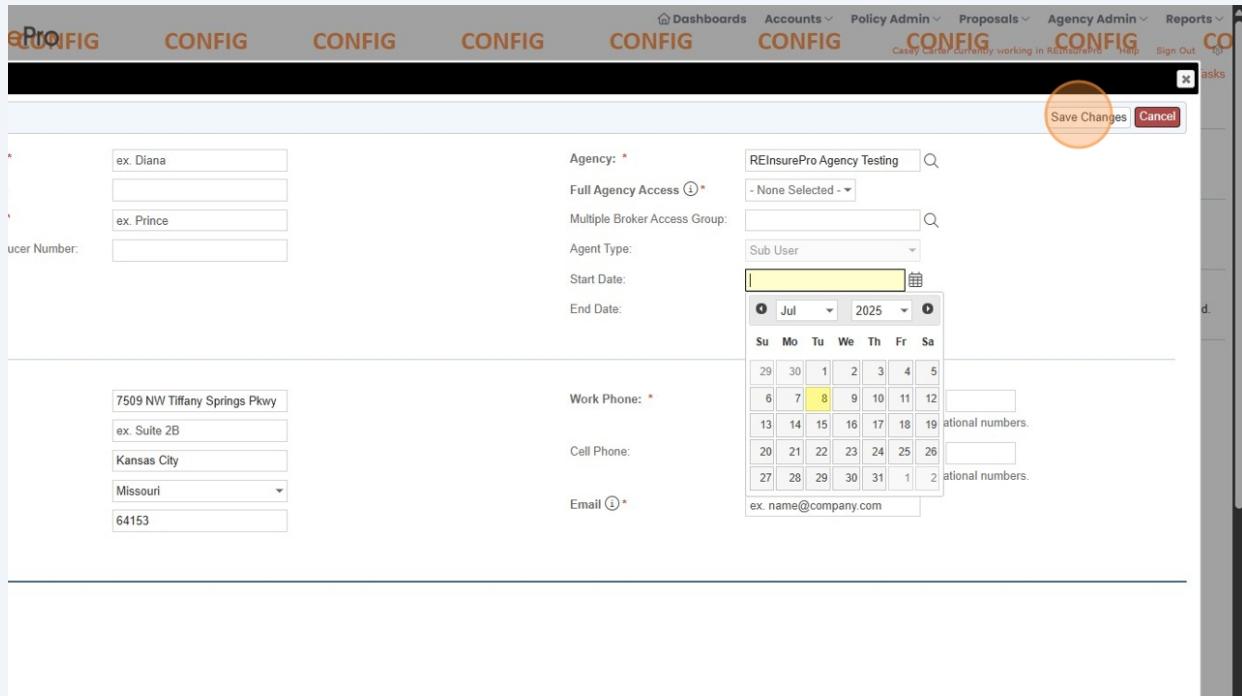
Email ① * ex. name@company.com

6 Select the start date for your agent.



The screenshot shows the REInsurePro Agency Testing interface. The top navigation bar includes links for Dashboards, Accounts, Policy Admin, Proposals, Agency Admin, and Reports. The main content area is titled 'Agent Configuration'. On the left, there are input fields for 'User Number' (with examples 'ex. Diana' and 'ex. Prince') and 'Address' (with examples '7509 NW Tiffany Springs Pkwy', 'ex. Suite 2B', 'Kansas City', 'Missouri', and '64153'). On the right, there are fields for 'Agency' (set to 'REInsurePro Agency Testing'), 'Full Agency Access' (set to '- None Selected -'), 'Multiple Broker Access Group' (empty), 'Agent Type' (set to 'Sub User'), and date selection fields for 'Start Date' and 'End Date'. The 'Start Date' field is highlighted with a red circle.

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



The screenshot shows the same REInsurePro Agency Testing interface as the previous step. The 'Start Date' field is now populated with '2025-07-08'. The 'Save Changes' button at the top right is highlighted with a red circle.