



DONEGAL®
INSURANCE GROUP

***Agency Contact
Guide***

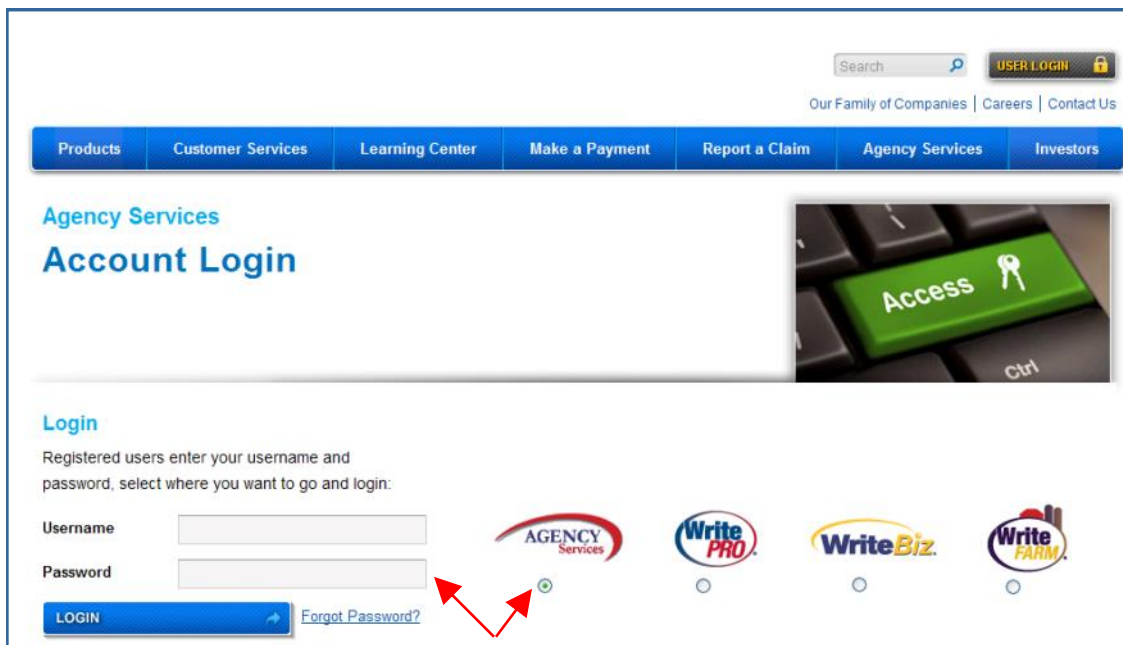
Agency Contact Guide

Edition Date: 07/02/2018

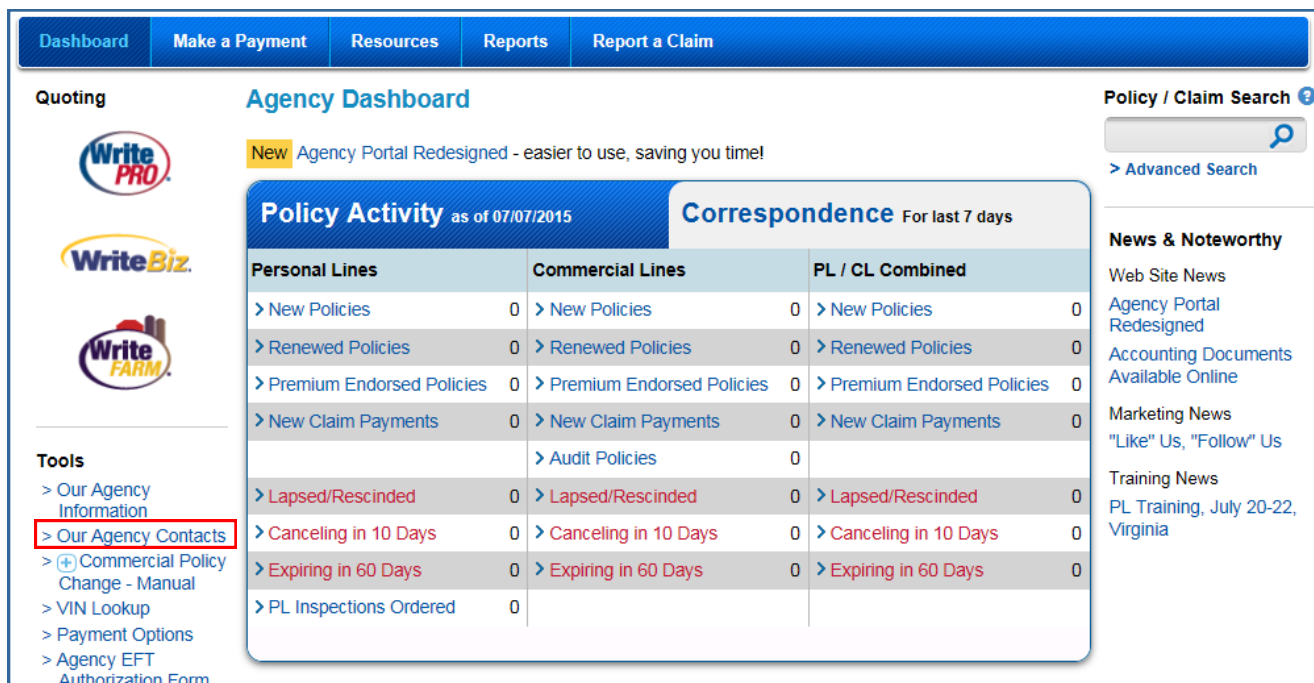
Confidentiality Agreement

This material contains confidential and proprietary information of the Donegal Insurance Group, intended to facilitate the use of Donegal business tools and software. Any other use or distribution of this information is prohibited.

CREATE EMPLOYEE WEB USER ID



**SELECT “Agency Services”
ENTER “Contact Maintenance” or “Agency Principal” user ID & password
LOGIN**



SELECT “Our Agency Contacts”

CLICK "Create New Contact"

NOTE:

For security purposes, there should be **NO SHARED LOGINS** between the employees of your agency.

Each web user should have their own unique user ID and password for accessing the company websites.

COMPLETE Individual Contact Info
SELECT "Allow this contact to use website?"
ENTER User Name & new password
SELECT "CSR Incentive" to participate in incentive program

Contact Primary Location Info:

Location:
 SELECT LOCATION

Address: Phone:
Fax:
Email:

Please verify that the location information is correct.
 Use the Text block below to communicate Location Information changes, or any other general correspondence to the Donegal Branch Office.

**SELECT location from drop down menu
 Changes in agency location data can be entered into the text block
 for submission to the branch office**

Contact Attributes

Check All That Apply

<p>Personal Lines</p> <p><input type="checkbox"/> PL Incentives Contact</p> <p><input type="checkbox"/> PL Contact</p> <p><input type="checkbox"/> PL Claims Contact</p> <p><input type="checkbox"/> PL Cancel-Lapse Contact</p>	<p>Commercial Lines</p> <p><input type="checkbox"/> CL Transactions Report Email</p> <p><input type="checkbox"/> CL Incentives Contact</p> <p><input type="checkbox"/> CL Contact</p> <p><input type="checkbox"/> CL Claims Contact</p> <p><input type="checkbox"/> CL Cancel-Lapse Contact</p> <p><input type="checkbox"/> CL Automated Renewal Contact</p>	<p>Other Contacts</p> <p><input type="checkbox"/> Customer Service Rep</p> <p><input type="checkbox"/> Commission Statement Contact</p> <p><input type="checkbox"/> Automation Contact</p> <p><input type="checkbox"/> Accounting Contact</p>
---	---	--

APPLY "Contact Attributes"

NOTE: Selecting an item in the Contact Attributes section designates that user as the recipient of company email notifications for the selected contact type.

If you make NO selection for either PL or CL Claims Contact, the Agency Principal will automatically receive these notifications by default. The Agency Principal will also automatically receive email notifications of a **TOTAL LOSS** regardless of who is designated as a Claims Contact.

Contact for Agency Codes
Please indicate the Agency Codes this person can view on the website and receive communications for.

Agency	Address	Principal	Contact Management	Agency Sweep (EFT)	Account Clerk
<input type="checkbox"/> 000: TEST AGENCY	FOR WRITEPRO TESTING MARIETTA PA 017547	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> 550: DONEGAL TEST AGENCY	FOR GEORGIA WRITEPRO TESTING MARIETTA PA 017547	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Reset Form Submit Form

SELECT the agency code(s) you want the user to view on the website
SELECT "Agency Sweep (EFT)" to allow user to post Electronic Funds Transfers on the website
SELECT "Account Clerk" to grant user access to Commission Reports on the website
CLICK "Submit Form" to complete
NOTIFY employee of new user ID & password

NOTE: Selecting "Contact Management" allows the designated user access to the Agency Contact portion of the site and the ability to modify or establish user information at the agency level. Typically this designation should NOT be assigned to each individual user.

Selecting "Account Clerk" allows the designated user access to the Direct Bill Commission reports which can typically only be seen by the holder of an "Agency Principal" user ID. An "Account Clerk" user will ONLY be able to see the commissions report and will not be able to access any of the other reports that are usually available to the Agency Principal. Typically this designation should NOT be assigned to each individual user.

The "Principal" option can NOT be assigned at the agency level. This user type can ONLY be designated by the company upon receipt of an Agency Principal Web Registration Form.

If the "Agency Sweep (EFT)" field is grayed out, contact Automation Support at 888-640-5840 to activate.

CHANGE EMPLOYEE WEB USER

Agency Contact Maintenance

Please refer to the Agency Contact Guide for details on how to maintain your agency contact information.

Welcome to the Agency Contact Maintenance section of our site.

Accurate and timely updating of your employees' contact information (email address, attributes, etc) on this section of the Donegal Web Site will be VERY IMPORTANT going forward so that we can more quickly and accurately communicate information to you. We will now be able to quickly e-mail you important product news, WritePro and WriteBiz enhancement information, and much more, rather than the traditional fax transmission and paper mail.

Filtering Options

Agency Locations: All | Contact Type: Show All Contact Types | Display Option: Abbreviated




Create New Contact

Name	Licensed Email	Phone
AAA, TEST	No	
ACCESS, EZLYNX	No	
AGENCY, TEST	No	
ASDFASDF, ASDFA	No	

CLICK employee name in contact list

Dashboard
Make a Payment
Resources
Reports
Report a Claim

Quoting

Tools

- > Our Agency Information
- > Our Agency Contacts
- > Commercial Policy Change - Manual
- > VIN Lookup
- > Payment Options
- > Agency EFT Authorization Form
- > Insured APP & ROC Authorization Forms

Principal Reports

- > Monthly Agency Experience
- > Monthly Direct Bill Commissions
- > YTD Claims Incurred Loss
- > Travel Incentive Bonus Points
- > Service Center Activity

Contact Details

[Return To List of Contacts >](#)

Licensed: No
Status: ACTIVE
Deactivate

Individual Contact Info

First Name:	Middle Name:	Last Name:
TEST	E	USER4
Legal First Name:	Legal Middle Name:	Legal Last Name:
TEST	E	USER4
Title:	Phone Number:	Fax Number:
	111-222-3333	222-333-4444
E-mail Address:		
<input type="text"/>		

Login Information for Website

Allow this contact to use website? - Check the box to ALLOW this user to use the website.

User Name:	New Password:
<input type="text"/>	<input type="text"/>
<input type="checkbox"/> CSR Incentive	

Both username and password should be 8 characters or more in length. Please advise your employees of their new user name and password once created. User will have to select a new password when they login.

Contact Primary Location Info:

Location:

Address: TEST AGENCY
FOR WRITEPRO TESTING
MARIETTA, PA 17547

Phone: _____
Fax: _____
Email: _____

Please verify that the location information is correct.
Use the Text block below to communicate Location Information changes, or any other general correspondence to the Donegal Branch Office.

Contact Attributes

Check All That Apply

<p>Personal Lines</p> <p><input type="checkbox"/> PL Incentives Contact</p> <p><input type="checkbox"/> PL Contact</p> <p><input type="checkbox"/> PL Claims Contact</p> <p><input type="checkbox"/> PL Cancel-Lapse Contact</p>	<p>Commercial Lines</p> <p><input type="checkbox"/> CL Transactions Report Email</p> <p><input type="checkbox"/> CL Incentives Contact</p> <p><input type="checkbox"/> CL Contact</p> <p><input type="checkbox"/> CL Claims Contact</p> <p><input type="checkbox"/> CL Cancel-Lapse Contact</p> <p><input type="checkbox"/> CL Automated Renewal Contact</p>	<p>Other Contacts</p> <p><input checked="" type="checkbox"/> Customer Service Rep</p> <p><input type="checkbox"/> Commission Statement Contact</p> <p><input type="checkbox"/> Automation Contact</p> <p><input type="checkbox"/> Accounting Contact</p>
---	---	---

Contact for Agency Codes

Please indicate the Agency Codes this person can view on the website and receive communications for.

Agency	Address	Principal	Contact Management	Agency Sweep (EFT)	Account Clerk
<input checked="" type="checkbox"/>	000 TEST AGENCY	FOR WRITEPRO TESTING MARIETTA PA 017547	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	550 TEST AGENCY	FOR GEORGIA WRITEPRO TESTING MARIETTA PA 017547	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Policy / Claim Search

[Advanced Search](#)

Quick Page Links

- > Top
- > Individual Contact Info
- > Login Information for Website
- > Contact Primary Location Info
- > Contact Attributes
- > Contact for Agency Codes
- > Submit Form

Reset Form
Submit Form

ADD, CHANGE or REMOVE contact data entry
Logins for existing contacts can be also created here if needed
CLICK "Submit Form" when completed

DEACTIVATE EMPLOYEE WEB USER

Agency Contact Maintenance

Please refer to the [Agency Contact Guide](#) for details on how to maintain your agency contact information.

Welcome to the **Agency Contact Maintenance** section of our site.

Accurate and timely updating of your employees' contact information (email address, attributes, etc) on this section of the Donegal Web Site will be VERY IMPORTANT going forward so that we can more quickly and accurately communicate information to you. We will now be able to quickly e-mail you important product news, WritePro and WriteBiz enhancement information, and much more, rather than the traditional fax transmission and paper mail.

Filtering Options

Agency Locations: All | Contact Type: Show All Contact Types | Display Option: Abbreviated

Create New Contact

Name	Licensed Email	Phone
AAA, TEST	No	
ACCESS, EZLYNX	No	
AGENCY, TEST	No	
ASDFASDF, ASDFASDF	No	

CLICK employee name in Contact List

Contact Details

Return To List of Contacts »

Licensed: No Status: ACTIVE **Deactivate**

Individual Contact Info

First Name: TEST Middle Name: E Last Name: USER4

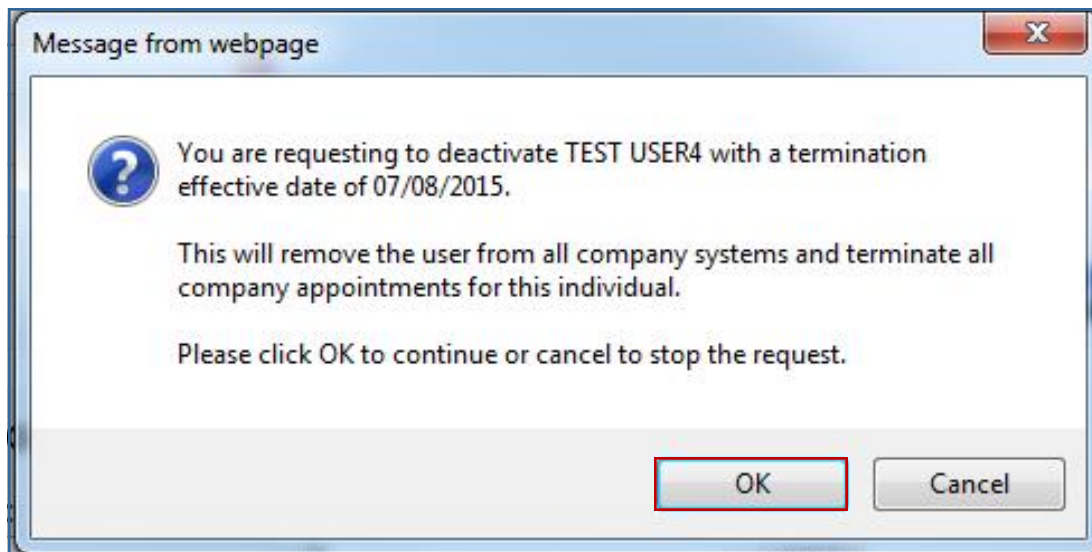
Legal First Name: TEST Legal Middle Name: E Legal Last Name: USER4

Title: Phone Number: 111-222-3333 Fax Number: 222-333-4444

E-mail Address:

CLICK the "Deactivate" button




ENTER deactivation date
ENTER deactivation reason
CLICK "Continue"



CLICK "OK" to confirm deactivation request

Dashboard
Make a Payment
Resources
Reports
Report a Claim

Quoting

Tools

- > Our Agency Information
- > Our Agency Contacts
- > (+) Commercial Policy Change - Manual
- > VIN Lookup
- > Payment Options
- > Agency EFT Authorization Form
- > Insured APP & RCC Authorization Forms

Principal Reports

- > Monthly Agency Experience
- > Monthly Direct Bill Commissions
- > YTD Claims Incurred Loss
- > Travel Incentive Bonus Points
- > Service Center Activity

Contact Details

[Return To List of Contacts »](#)

Licensed: **No** Status: **ACTIVE**

✔ Deactivation submitted:

Your request for contact deactivation, including removal of web access, is being processed and will be completed by close of business on the date requested

If you would like web access for this contact removed immediately, uncheck the "Allow contact to use web site" checkbox under "Login Information for Website", and submit your changes.

Individual Contact Info

First Name:	Middle Name:	Last Name:
TEST	E	USER4
Legal First Name:	Legal Middle Name:	Legal Last Name:
TEST	E	USER4
Title:	Phone Number:	Fax Number:
	111-222-3333	222-333-4444
E-mail Address:		
KIMFERRY@DONEGALGROU		

Policy / Claim Search ?

> Advanced Search

Quick Page Links

- > Top
- > Individual Contact Info
- > Login Information for Website
- > Contact Primary Location Info
- > Contact Attributes
- > Contact for Agency Codes
- > Submit Form

Allow this contact to use website? - *Uncheck the box to DISALLOW this user to use the website.*

User Name	New Password	
<input type="text" value="SURPRISE1000"/>	<input type="text"/>	<input checked="" type="checkbox"/> CSR Incentive

Both User Name and password should be 8 characters or more in length. User will have to select a new password when they login.

Deactivation acknowledgement generated.

**Request will be processed by close of business of the deactivation date entered.
RETURN to "List of Contacts"**

For IMMEDIATE user termination, after acknowledgement has been received:

**DESELECT web access check box
CLICK "SUBMIT FORM" button at bottom of page**




Page 8

07/02/2018

REACTIVATE EMPLOYEE WEB USER

Dashboard
Make a Payment
Resources
Reports
Report a Claim

Quoting

Tools

- > Our Agency Information
- > Our Agency Contacts
- > (+) Commercial Policy Change - Manual
- > VIN Lookup
- > Payment Options
- > Agency EFT Authorization Form
- > Insured APP & RCC Authorization Forms

Principal Reports

- > Monthly Agency Experience
- > Monthly Direct Bill Commissions

Contact Details

[Return To List of Contacts »](#)

Licensed: **No** Status: **ACTIVE** Deactivate

Individual Contact Info

First Name:	Middle Name:	Last Name:
<input type="text" value="TEST"/>	<input type="text" value="E"/>	<input type="text" value="USER5"/>
Legal First Name:	Legal Middle Name:	Legal Last Name:
<input type="text" value="TEST"/>	<input type="text" value="E"/>	<input type="text" value="USER5"/>
Title:	Phone Number:	Fax Number:
<input type="text"/>	<input type="text" value="111-222-3333"/>	<input type="text" value="222-333-4444"/>
E-mail Address:		
<input type="text" value="KIMFERRY@DONEGALGROU"/>		

Login Information for Website

Allow this contact to use website? - *Check the box to ALLOW this user to use the website.*

User Name:	New Password:	<input type="checkbox"/> CSR Incentive
<input type="text"/>	<input type="text"/>	

Both username and password should be 8 characters or more in length. Please advise your employees of their new user name and password once created. User will have to select a new password when they login.

Policy / Claim Search ?

> Advanced Search

Quick Page Links

- > Top
- > Individual Contact Info
- > Login Information for Website
- > Contact Primary Location Info
- > Contact Attributes
- > Contact for Agency Codes
- > Submit Form

SELECT "Allow this contact to use website?" check box
ENTER a new password
CLICK "Submit Form" button at bottom of page
ADVISE employee of new password;

PLEASE NOTE: For security purposes, Automation Support will not be able to reactivate agency employee logins.

*Questions? Contact our **Resource Center** at **888-640-5840**.*