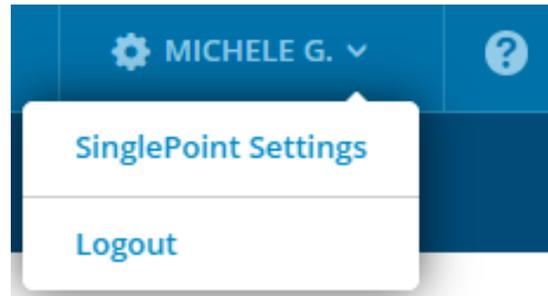




SinglePoint Settings for Administrators

MANAGE SINGLEPOINT FOR YOUR AGENCY

Access SinglePoint Settings here:





Manage Employees
Add, change, and disable user accounts for your agency.



Rating
Manage Settings for Rating

Manage Employee List



Add a New User

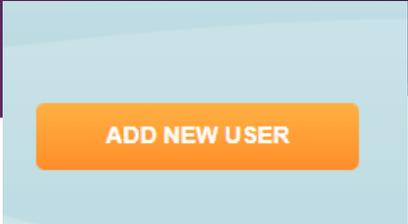
First Name	<input type="text" value="Joe"/>
Last Name	<input type="text" value="Employee"/>
Email	<input type="text" value="joeworks@bostonsoftware.com"/>
Phone	<input type="text"/>
Phone Ext	<input type="text"/>

Permissions:

- Employee
- Manager
- RMV Access
- RMV Access SysControl
- System Admin
- System Employee
- System Manager

Facility	<input type="text" value="Boston Software Corp. - CVB - Needham (1185)"/>
Employer	<input type="text" value="1185"/>

or



Edit or Disable a User

First Name	<input type="text" value="Joe"/>
Last Name	<input type="text" value="Employee"/>
Email	<input type="text" value="joeworks@bostonsoftware.com"/>
Phone	<input type="text"/>
Phone Ext	<input type="text"/>

Permissions:

- Employee
- Manager
- RMV Access
- RMV Access SysControl
- System Admin
- System Employee
- System Manager

Facility	<input type="text" value="Boston Software Corp. - CVB - Needham (1185)"/>
Employer	<input type="text" value="1185"/>

or



Step by Step User Settings in SinglePoint

1-Go to Your Name in Upper Right of SinglePoint

2-Select SinglePoint Settings from Drop down

3-Select Manage Employees

4-To Add a User-Select Add New User. Enter Name, unique email address, RMV Access, facility

5-To Edit or Disable a User, Reset a Password, Change a branch location -Select Name of Employee
Edit Profile or Disable Account

Set Defaults

BUSINESS: Boston Software Corp. - CVB



Auto Rating Defaults

Manage Settings for Auto Rating



Home Rating Defaults

Manage Settings for Home Rating



Dwelling Fire Defaults

Manage Settings for Dwelling Fire Rating



Umbrella Defaults

Manage Settings for Umbrella Rating



Commercial Auto Defaults

Manage Settings for Commercial Auto Rating



Printing

Manage Settings for Quote Printing and PDF



Agency Codes

Manage Agency Codes

Set Defaults for Auto Rating

BUSINESS: Boston Software Corp. - CVB



Coverage 1-12 Quick Defaults

Set up to three different sets of defaults for Coverages 1-12



Vehicle Additional Coverages

Manage defaults for Automatically Added Additional Coverages at the Vehicle level



Carrier Options

Manage defaults for Automatically Added Carrier Options at the Policy level

Set Defaults for Home Rating

BUSINESS: Boston Software Corp. - CVB



Carrier Options

Manage defaults for Automatically Added Carrier Options at the Policy level



Other Defaults

Manage defaults for items like Policy Type, Liability/Med Pay, and Replacement Costs



General Options

Manage defaults for Automatically Added General Options at the Policy level

Set Defaults for Dwelling Fire & Umbrella



Dwelling Fire Defaults

Manage Settings for Dwelling Fire Rating



Umbrella Defaults

Manage Settings for Umbrella Rating

Set Agency Codes



Agency Codes

Manage Agency Codes

<input type="checkbox"/>	 Providence	<input type="button" value="ADD AGENT CODE"/>
<input type="checkbox"/>	<input type="checkbox"/> 0000001 -	
<input type="checkbox"/>	<input type="checkbox"/> 12345 - Test Code for Main Office	
<input type="checkbox"/>	<input type="checkbox"/> 1 - test code	
<hr/>		
<input type="checkbox"/>	 Safeco	<input type="button" value="ADD AGENT CODE"/>
<input type="checkbox"/>	<input type="checkbox"/> 561342 - New test code	
<hr/>		
<input type="checkbox"/>	 Safeco	<input type="button" value="ADD AGENT CODE"/>
<input type="checkbox"/>	<input type="checkbox"/> 561342 - New test code	
<hr/>		
<input type="checkbox"/>	 Safety	<input type="button" value="ADD AGENT CODE"/>
<input type="checkbox"/>	<input type="checkbox"/> 23100 - Main Office	
	32 - Preferred New Business	
	003 - 3 digits	
	0004 - 4 digits	
	44 - BC Discount	
<input type="checkbox"/>	<input type="checkbox"/> 00022 - Kaplansky Test	
	12 - Tom Brady Fans	
<input type="checkbox"/>	<input type="checkbox"/> 001123 - Demo for Safety Code	
	234 - Group Plan	
<hr/>		
<input type="checkbox"/>	 Safety	<input type="button" value="ADD AGENT CODE"/>
<input type="checkbox"/>	<input type="checkbox"/> 23100 -	
<hr/>		
<input type="checkbox"/>	 Travelers	<input type="button" value="ADD AGENT CODE"/>
<input type="checkbox"/>	<input type="checkbox"/> 0A0165 -	
<hr/>		
<input type="checkbox"/>	 Travelers	<input type="button" value="ADD AGENT CODE"/>

Carrier Credentials



Carrier and Third Party Credentials

Update the Username and Passwords for all of your carrier and Third Party accounts.

EDIT CARRIER CREDENTIALS

Show All Hide All

Andover

User ID Agent6578

Password

Arbella Mutual

User ID bostons

Password

Barnstable Mutual

User ID singlepointagent

New Security Measures in SinglePoint

- ▶ 10 Minute limit to address link for creating a New User Account
- ▶ 10 Minute limit to address link for a Password Reset
- ▶ Automatic disabling of User Account if not logged in for 120 days
- ▶ Longer, stronger Password-green bar
- ▶ Recently Updated our End User Licensing Agreement

SinglePoint Settings FAQ's

- ▶ Why when I try to reset a Password, do I not receive the link?
- ▶ This usually occurs when a firewall or anti-virus software blocks the email

- ▶ Who should add New Users?
- ▶ SinglePoint Account Managers at the agency, and BSC as backup

- ▶ Why am I getting an Authentication error when I have updated my Carrier Creds?
- ▶ All Carrier Creds must be updated in the carrier site first, confirm login, then come back to SinglePoint Settings to enter there and SAVE!