Agency Utilities

This chapter explains how to use the Agency Utilities Screen to:

✓ Maintain an agency password.
✓ Browse policy numbers.
✓ Change information that is specific to your agency.

To access the Agency Utilities Screen, select Agency Utilities on the Main Menu.

The Agency Utilities Page displays.

**Updating your password**

Your password expires every 60 days, at which time CollaborativeEdge prompts you to enter a new one.

To update your password, select the Agent Password Maintenance menu option.

The Password Page displays:
Password Page: Directions:

1. Type the old password.
2. Type the new password.
3. Type the new password (again, to verify).
4. Click **Update Password** to make the change, or **Reset** to erase your entries.

Password Page: Notes

The default password is **123456**. After the initial sign-on, you must re-set the password. If you forget the password later, the company can reset it to the default.

**Browse Policy Numbers**

To access this screen, click on **Browse Policy Numbers** on the Agency Utilities Screen.

The Browse Policy Numbers Screen displays.
Agency Customization

Use this function to add or modify agency information, including:

- Name
- Fax
- Address
- Email Address
- Phone
- Web Address (URL)

To access this screen, click on Agency Customization on the Agency Utilities Screen.

The Agency Customization screen displays.
Agency Customization Page: Directions

Complete the applicable fields, then click on the Main button to return to the Main Menu.