Instructions for Adding a User for a Broker

Go to the Bill It Now Website (www.billitnow.com)

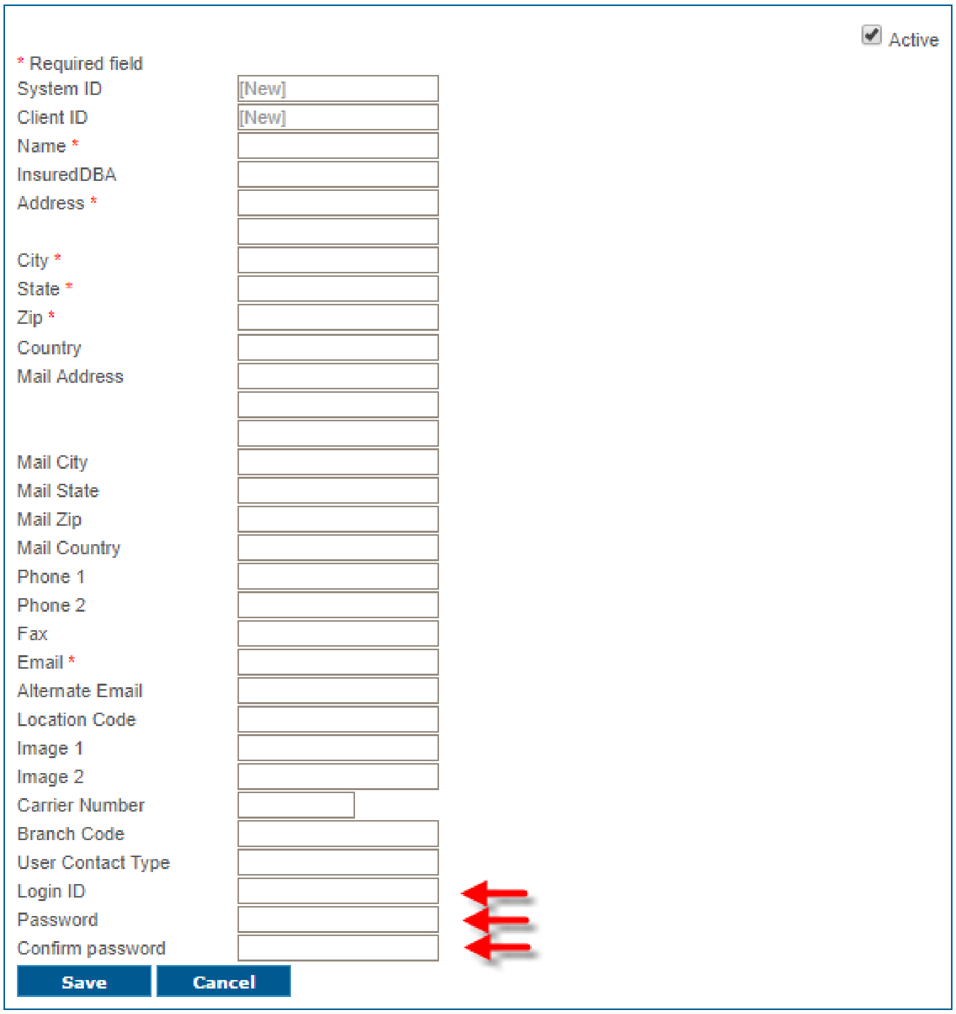
Most brokers are set up in the feed if an email address is provided for that broker. The default user for the broker can then set up other users in their company, if necessary. If an email was not provided and a user needs to be set up, please follow these instructions.

1. After logging into the billing system, click 'Broker in the Accounts section.

2. Search for the broker by name or broker number or scroll through the broker list. Click on the broker name.

3. In the left navigation of the Company Profile page, click 'Add new Website User'

4. Enter all the required information for the new user. The Login ID and Password are also required fields, so please assign a username and initial password, then click ‘Save’. You will need to communicate this username and password to the new user.



5. Choose the permissions to assign to the user. Click the boxes to allow appropriate access for the new user. If you click the checkbox in the top left, this will assign all permissions at once. Make sure to click ‘Save’.

Permission

Broker

- Can Reset PolicyHolder Password — This section allows the user to reset passwords.

LossPayee

- Can View LossPayee — This section allows the user to view loss payee.

Misc

- Can Login — This section allows the user to login.

Office

- Can View Office Account — This section allows the user to view the company profile.

Policy

- Can View Policy
- Can Pay Policy
- Can Edit User Name and Password

This section allows the user to view policy details, make an online payment for a policy.

Policyholder

- Can View Policyholder
- Can Edit Policyholders

This section allows the user to view/edit policyholders.

Report

- Can View BrokerCommission Report
- Can View BrokerListing Report
- Can View ActivePolicyHolder Report
- Can View PendingCancellation Report
- Can View FutureReceivable Report
- Can View Billed Balance Report
- Can View Premium Report
- Can View Payment Txn Report
- Can View Credit Balance Report
- Can View Commission and Fee Payment Report
- Can View Overnight Result Transaction Report
- Can View Earlier Report
- Can View Installments Report
- Can View Policy Balance Reports

This section allows the user to view reports.

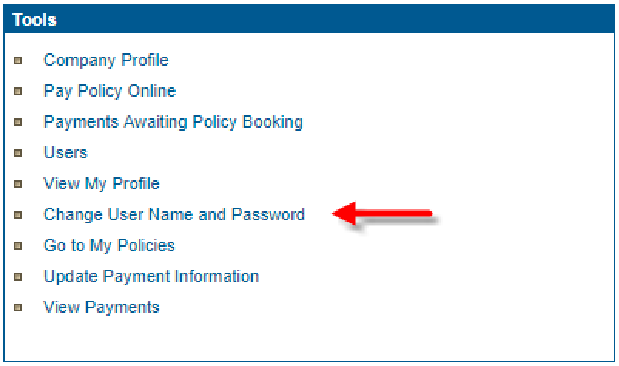
Site Users

- Can View Site Users
- Can Add Site Users
- Can Edit Site Users
- Can Delete Site Users

This section allows the user to add and delete site users.

Save Cancel

6. When the new user logs in with the credentials that you communicate to them, they can choose to change their username and password by clicking 'Change User Name and Password' in the Tools section.


Tools
Company Profile
Pay Policy Online
Payments Awaiting Policy Booking
Users
View My Profile
Change User Name and Password
Go to My Policies
Update Payment Information
View Payments