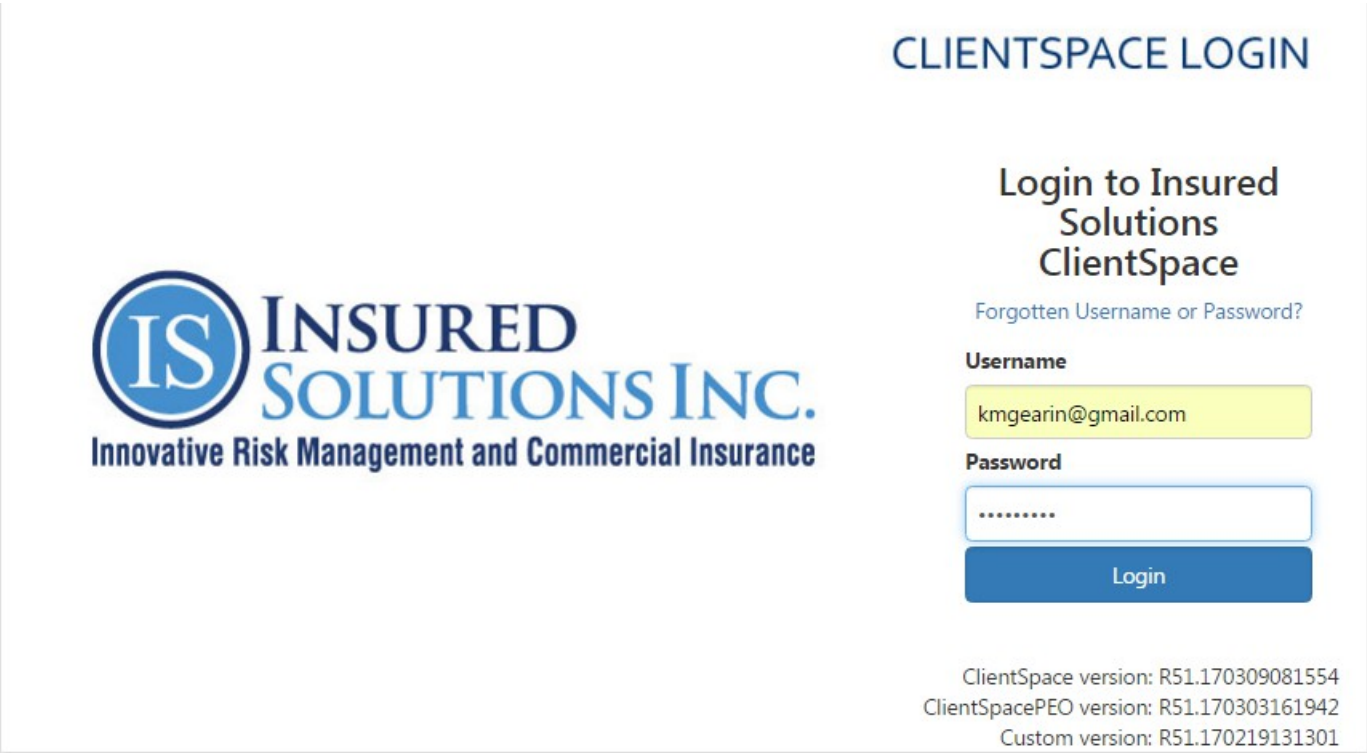


# How to Add a New User to your Insured Solutions Broker Portal



The screenshot shows the ClientSpace login interface for Insured Solutions Inc. On the left is the company logo, which consists of a blue circle containing the letters 'IS' in white, followed by the text 'INSURED SOLUTIONS INC.' in blue, and 'Innovative Risk Management and Commercial Insurance' in a smaller blue font below it. On the right, the page is titled 'CLIENTSPACE LOGIN' in blue. Below the title, it says 'Login to Insured Solutions ClientSpace'. There is a link for 'Forgotten Username or Password?'. The 'Username' field is highlighted in yellow and contains the email address 'kmgearin@gmail.com'. The 'Password' field is a white box with a blue border containing seven dots. Below the password field is a blue 'Login' button. At the bottom right, there are three lines of version information: 'ClientSpace version: R51.170309081554', 'ClientSpacePEO version: R51.170303161942', and 'Custom version: R51.170219131301'.

**CLIENTSPACE LOGIN**

Login to Insured Solutions ClientSpace

[Forgotten Username or Password?](#)

**Username**  
kmgearin@gmail.com

**Password**  
.....

Login

ClientSpace version: R51.170309081554  
ClientSpacePEO version: R51.170303161942  
Custom version: R51.170219131301

# After Logging In Select “Agent List”

The screenshot shows the ClientSpace Broker Portal interface. At the top left is the ClientSpace logo. The top right shows the user email kmgearin@gmail.com. A dark navigation bar contains 'Work Items' and 'Broker Portal' (with a close button). Below this is a sidebar with 'Broker Portal' and a main content area. The main content area has a blue header 'SUBMISSION CENTER' and a row of buttons: 'Quick Quote', 'Quick Submission', 'View Marketing Agreement', 'Update Agency', 'Agent List', and 'Refresh'. A blue arrow points to the 'Agent List' button. Below the buttons is a search bar with 'Quick Search...', a 'Search' button, and 'More' options. Below the search bar is a filter bar with 'Agent' and 'Park, KayKay'. At the bottom is a table with columns: Company Name, Status, Date Submitted, Contract Effective, and Agent.

Company Name	Status	Date Submitted	Contract Effective	Agent
ABC	Dead	10/15/2013	10/31/2013	Park, KayKay
ABC C	Dead		07/31/2014	Park, KayKay

# Select "Add"



kmgearin@gmail.com

Work Items

Broker Portal

Agency

Agency

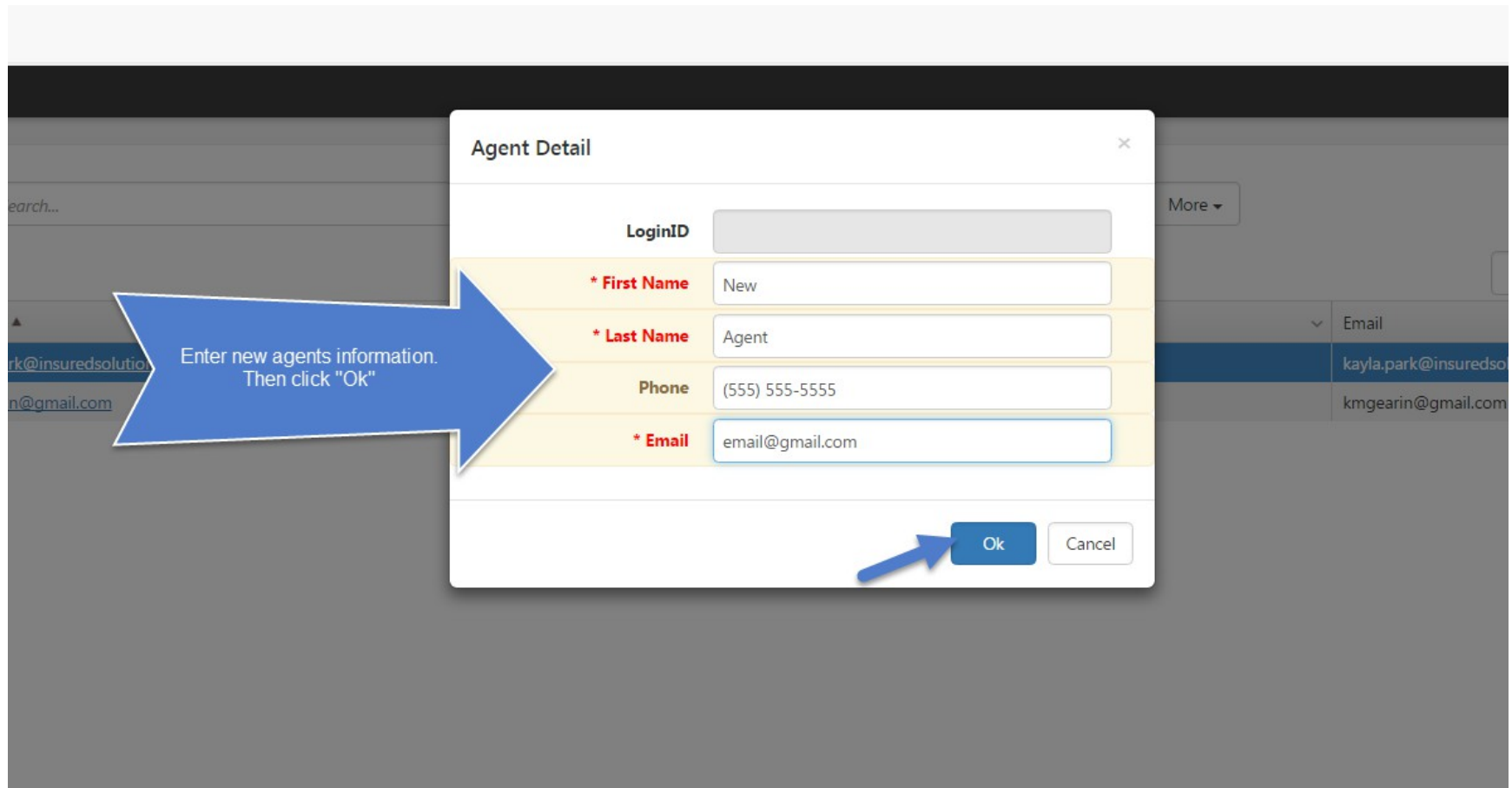
Quick Search...  Search More

Clear

Add Edit

LoginID	Name	Organization	Phone	Email
<a href="mailto:kayla.park@insuredsolutions.net">kayla.park@insuredsolutions.net</a>	Park, Kayla	Insured Solutions Demo Company		<a href="mailto:kayla.park@insuredsolutions.net">kayla.park@insuredsolutions.net</a>
<a href="mailto:kmgearin@gmail.com">kmgearin@gmail.com</a>	Park, KayKay	Insured Solutions Demo Company		kmgearin@gmail.com

# Enter new agent information



The image shows a screenshot of a web application interface. A modal window titled "Agent Detail" is open, displaying a form for entering agent information. The form has five input fields: "LoginID" (disabled), "\* First Name" (containing "New"), "\* Last Name" (containing "Agent"), "Phone" (containing "(555) 555-5555"), and "\* Email" (containing "email@gmail.com"). The fields for First Name, Last Name, Phone, and Email are highlighted in yellow. At the bottom of the modal, there are two buttons: "Ok" and "Cancel". A blue arrow points from the "Ok" button back to the main content area. In the main content area, a large blue arrow points from the text "Enter new agents information. Then click 'Ok'" to the "Ok" button.

Agent Detail

LoginID

\* First Name

\* Last Name

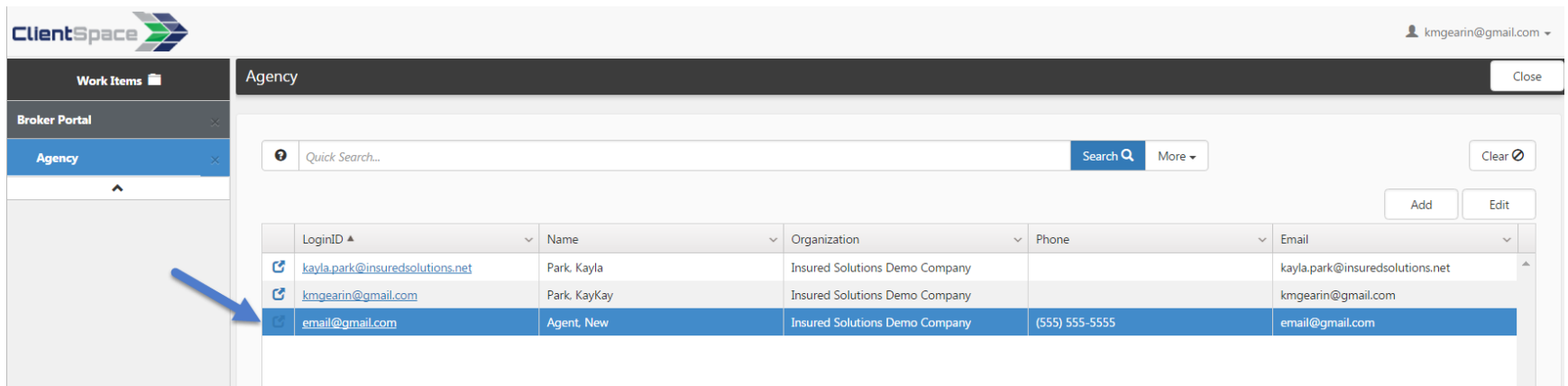
Phone

\* Email

Ok Cancel

Enter new agents information.  
Then click "Ok"

# New agent will be added to your list



The screenshot shows the ClientSpace Agency interface. The top navigation bar includes the ClientSpace logo, a user profile for 'kmgearin@gmail.com', and a 'Close' button. The left sidebar contains 'Work Items', 'Broker Portal', and 'Agency'. The main content area features a search bar with 'Quick Search...' and a 'Search' button. Below the search bar are 'Add' and 'Edit' buttons. A table lists agents with columns for LoginID, Name, Organization, Phone, and Email. The table contains three rows, with the third row, 'email@gmail.com', highlighted in blue and pointed to by a blue arrow.

LoginID ▲	Name	Organization	Phone	Email
<a href="mailto:kayla.park@insuredsolutions.net">kayla.park@insuredsolutions.net</a>	Park, Kayla	Insured Solutions Demo Company		kayla.park@insuredsolutions.net
<a href="mailto:kmgearin@gmail.com">kmgearin@gmail.com</a>	Park, KayKay	Insured Solutions Demo Company		kmgearin@gmail.com
<a href="mailto:email@gmail.com">email@gmail.com</a>	Agent, New	Insured Solutions Demo Company	(555) 555-5555	email@gmail.com