

Agent Interact

Roles and Permissions

Access to Agency Commission Statement – This role gives the user the ability to access agency commission statements through the “My Agency Commissions” tab in the quoting system. For more information, see UPC’s Commission Statement Guide. *(This role must also have either UPC Agent Support or UPC Independent Agent role to operate.)*

Agency User Administration – This role gives the user access to administer users for the agency, download commission statements and setup ACH for direct deposit. *(This role must have either UPC Agent Support or UPC Independent Agent role to operate.)*

Agent Support Role (View Only Access) – This “CSR” role allows a user to only view policies or quotes, take payments, and regenerate documents. It does not allow changes to be made to a policy.

Agent Licensed to Bind – Access to Agency Book – This role gives full agent access to quote, bind, process payments, cancel, and endorse a policy. The user can view the agency book.

Agent Licensed to Bind – User Book Access Only – This role gives full agent access to quote, bind, process payments, cancel, and endorse a policy. The user can only view their book.

Bind on behalf of Licensed Agent - This role allows the user to quote and bind a policy but requires a licensed agent’s name to be selected.

Quote without Binding User – Licensed agent can quote but cannot bind. This user role is usually limited for wholesaler agency use only.

Service Multiple Agencies/Locations – If your agency services more than one location, this role will allow the user to access other locations’ book. This role will only work if we have your agency connected to another agency(s). If you do not have access to your other locations, please email salesdept@upcinsurance.com.

My Sub Agency Commission – This will allow an agency’s User Administrator to add users for their agency and any sub agencies connected to the agency.