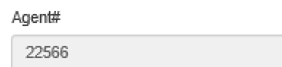
Welcome to the Broker Portal User Guide

This User Guide was created to help anyone who will be working with the Broker portal. Throughout the guide, please be aware of these references:

Here is a list of symbols that you will see in the Guide:

Delete	Phone Number	Email Address	Print
Fax	Social Media	Drop Down Menu	Settings

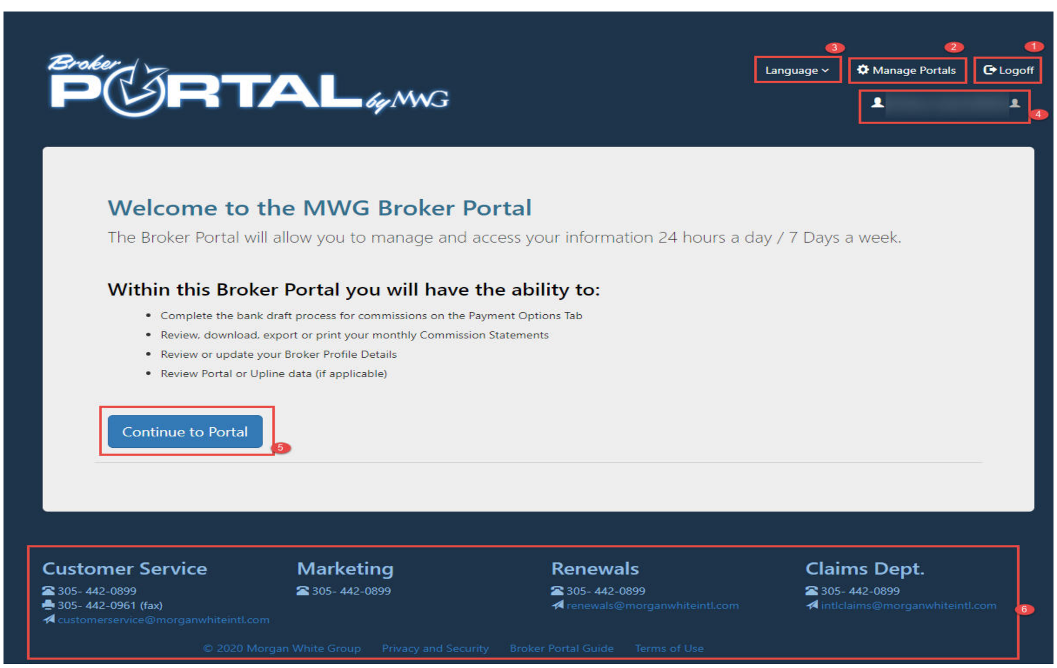
Please Note: When in the portal, you may come across boxes that are greyed-out. This indicates information that cannot be edited.



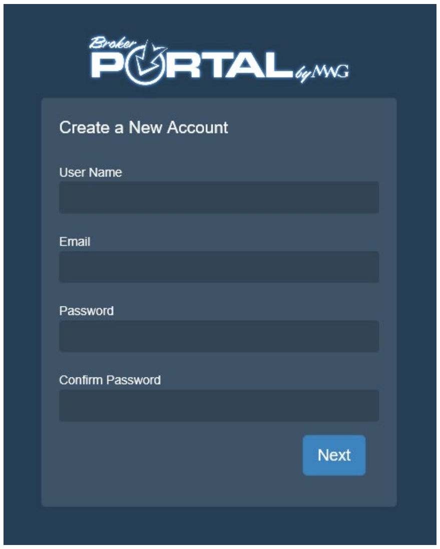
Reminder- You can access the Broker Portal User Guide or FAQ at the bottom of the website at any time.

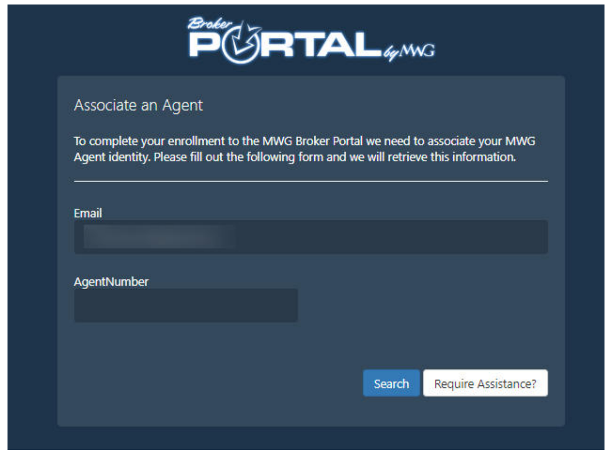
The Broker Portal URL: brokers.morganwhiteintl.com

Upon entering the Broker Portal, the first thing you will see is the landing page.



1. Logout Link-Click to log out of the portal.
2. Manage Portals- Here is where you can change your email or password.
3. Ability to switch languages from English to Spanish
4. This is your Username
5. Click here to enter the Broker Portal
6. Contact information





To Register for the First Time

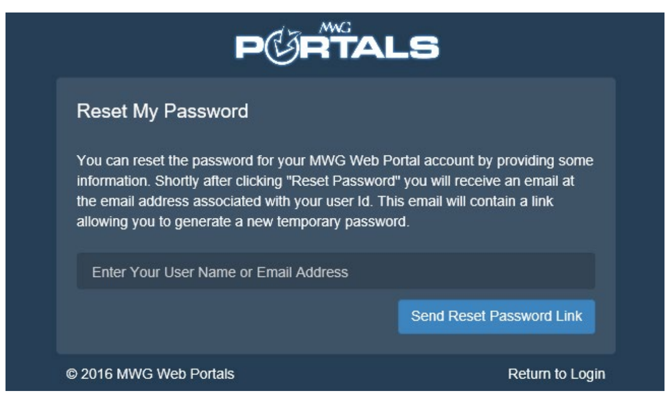
If you are registering for the first time, click the “Click Here” button to create a new account. The second screen will request your email address and agent number to validate the account.

If you receive multiple error messages, please contact your designated representative to assist with registering more than one portal in our system.

To Log in:

Click the “Log In Here” button to log on as an existing user. Enter your information and click “Log In”

To Reset you Password

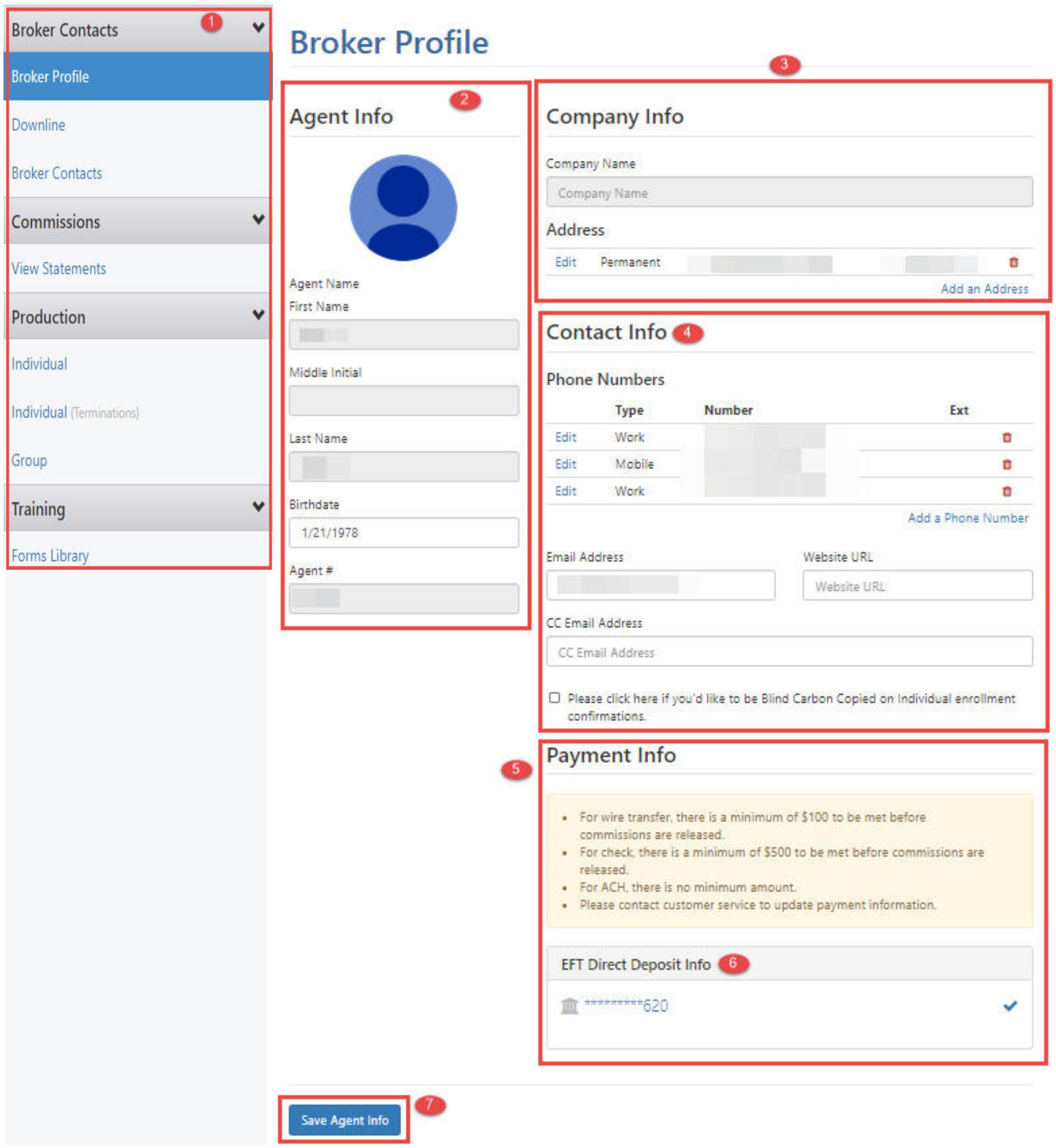


If you forget your password, click the “Forgot Password” Link. Enter your email or username and click “Send Reset Password” link.

Your username must match the email address used in the initial registration. If you receive an error message when you attempt to log in, try another email address you may have used when you first registered in the portal. Once you enter the correct username/password, an email will be sent to that email address. This will grant you access and provide instructions on resetting your password.

Inside the Portal

Once inside the portal, there are a few things to make note of here. First, the tool bar of options is located on the left hand side of the screen. Once a tab is clicked, the information will appear in the white area next to the tool bar.

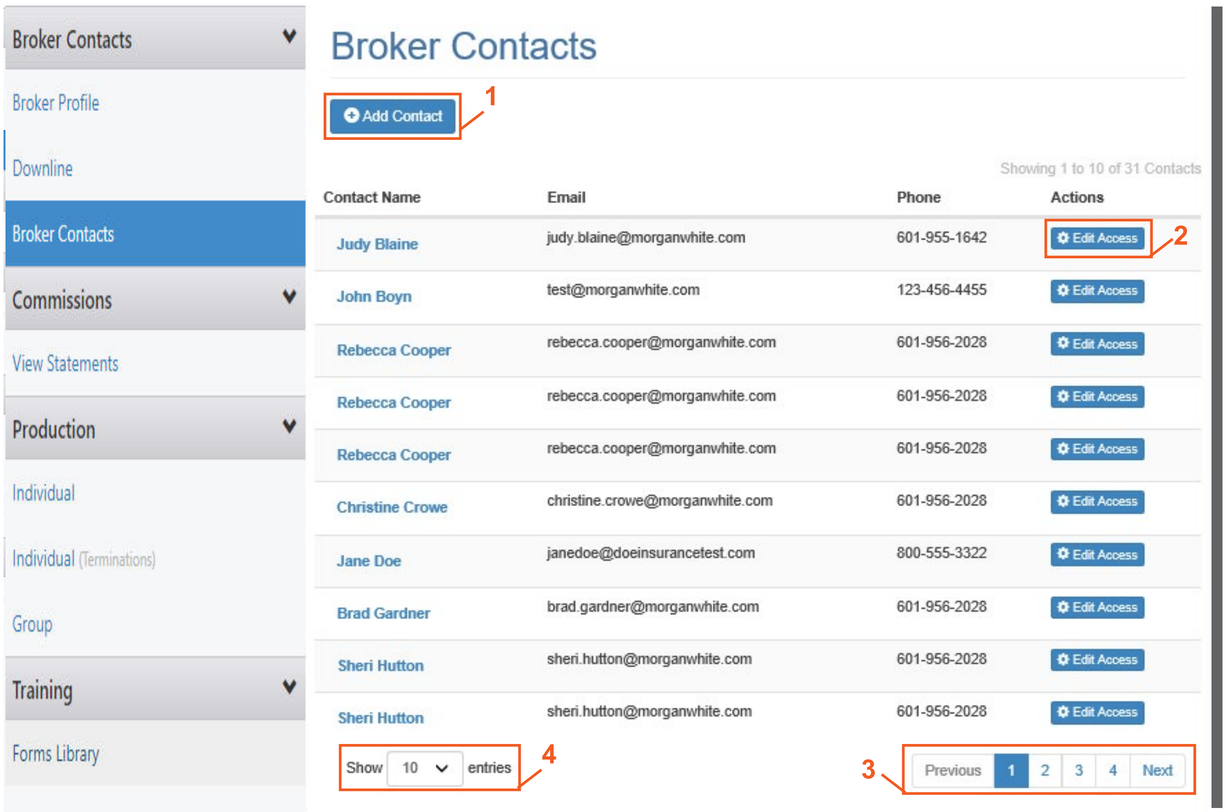


1. Toolbar
2. Agent Information
3. Company Information
4. Contact Information
5. Banking Information
6. Add a Payment Method
7. “Save” Information Button

The Broker Portal is broken down into categories:
Broker Contact, Commissions, Quoting and Enrollment, Production, and Training

If you click the “Broker Profile” link in the toolbar, there are two things you can accomplish:
1) Edit or complete broker demographics.
2) Enter or edit a payment method for commission deposits.

Broker Contacts Tab



1. Add Contact Button 2. Edit Access Button 3. Page Navigation 4. Entries Navigation

Within the “Broker Contacts” tab, brokers are able to add a contact to their account and assign them a role.

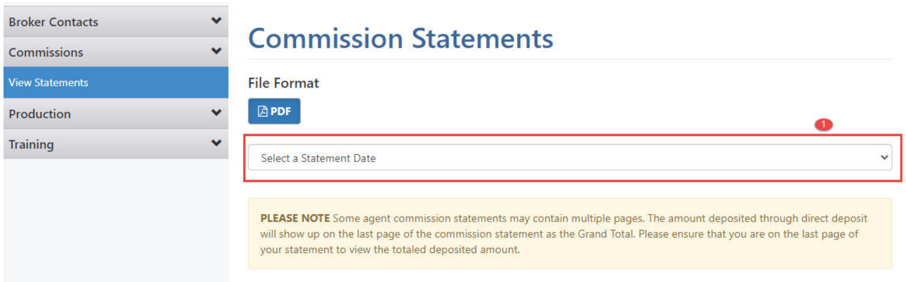
The roles are:
• **Broker Administrator** (ability to view, change, or update information)
• **Group Administrator** (ability to request access to any of the broker’s groups portals as well as generate marketing materials on the broker’s behalf)
• **Marketing Only** (allows only access to the broker’s marketing materials such as email templates or sales button images)
• **Commissions Only** (allows access to commission statements only)

You are able to add a contact to the account by clicking on the “Add Contact” button.

After providing the requested information, the contact’s data will be saved to the account. Next, assign the contact a role inside the portal by clicking the blue “Edit” tab on the right hand side of the page.

****Please Note**: This is a two-step process. Just providing the contact’s information will not give them access to information. You must assign the contact a role and send them an invitation. In turn, they would receive an email notifying them that they are now a contact with access and will be prompted to create their own username and password.

Commissions Tab



1. Commission Date Dropdown Menu

The second category on the Broker Portal is the "Commissions" tab. After contracting with MWG and having a full month of commission generated, you can go to this tab at any time and view your history of commission statements. **Please Note:** MWG does not mail commissions statements.

• Once a month ends, on the first day of the next month, the commission cycle is closed.

• Payments are reconciled, which is a manual process and can take 3-5 days to complete. Funds are then deposited by direct deposit

• Commissions are typically paid by the 10th of each month

• "Grand Total" is located on the LAST page of a statement

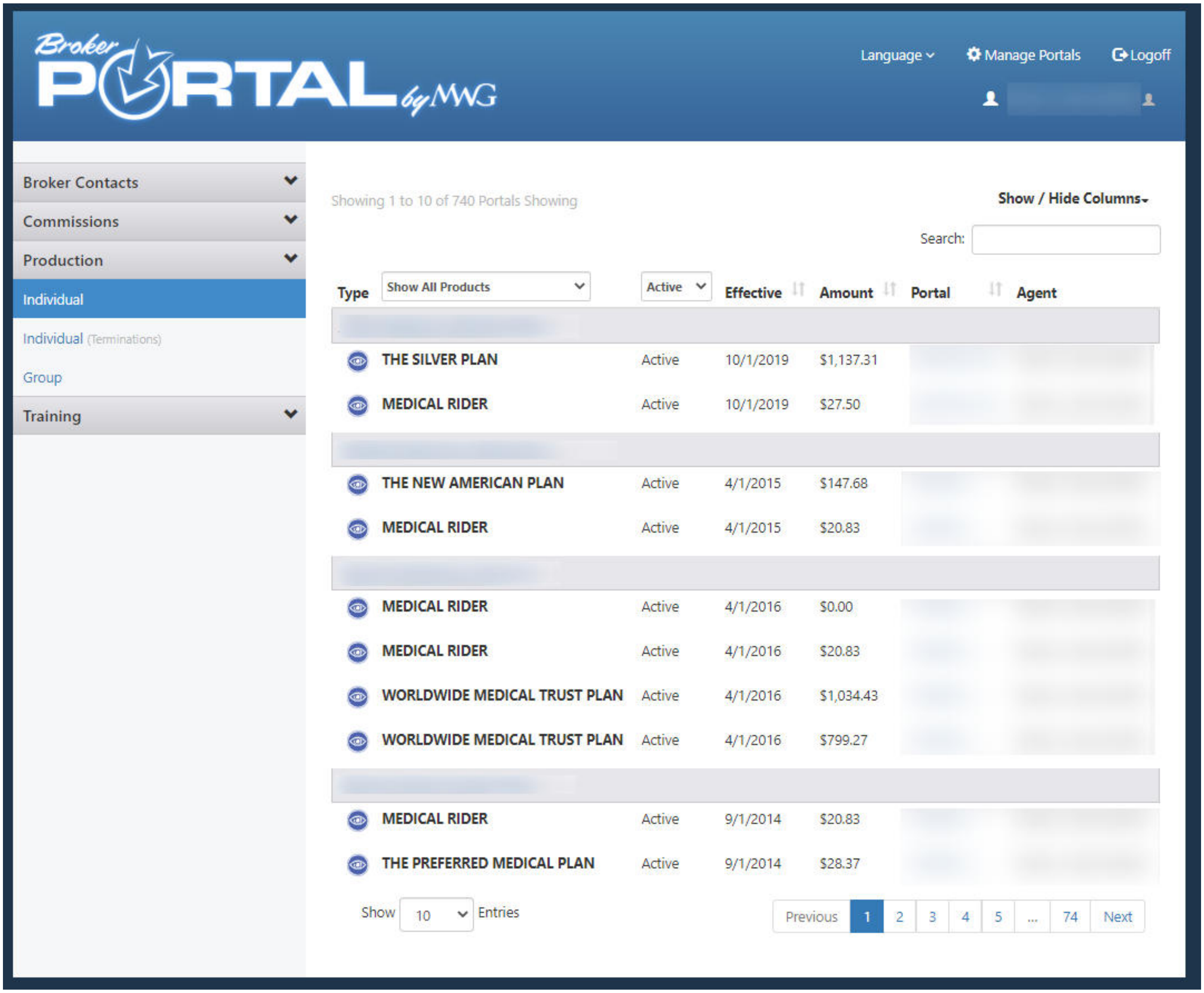
• The number of pages on a statement is found at the top of the toolbar.

• You can print off the PDF to see all pages or you can "arrow over" to the last page

• You can export these statements in different formats. PDF is the default standard, but you can save it as an image, export in Excel, etc. The File Format Dropdown menu is where you go to change the format once the PDF is opened.

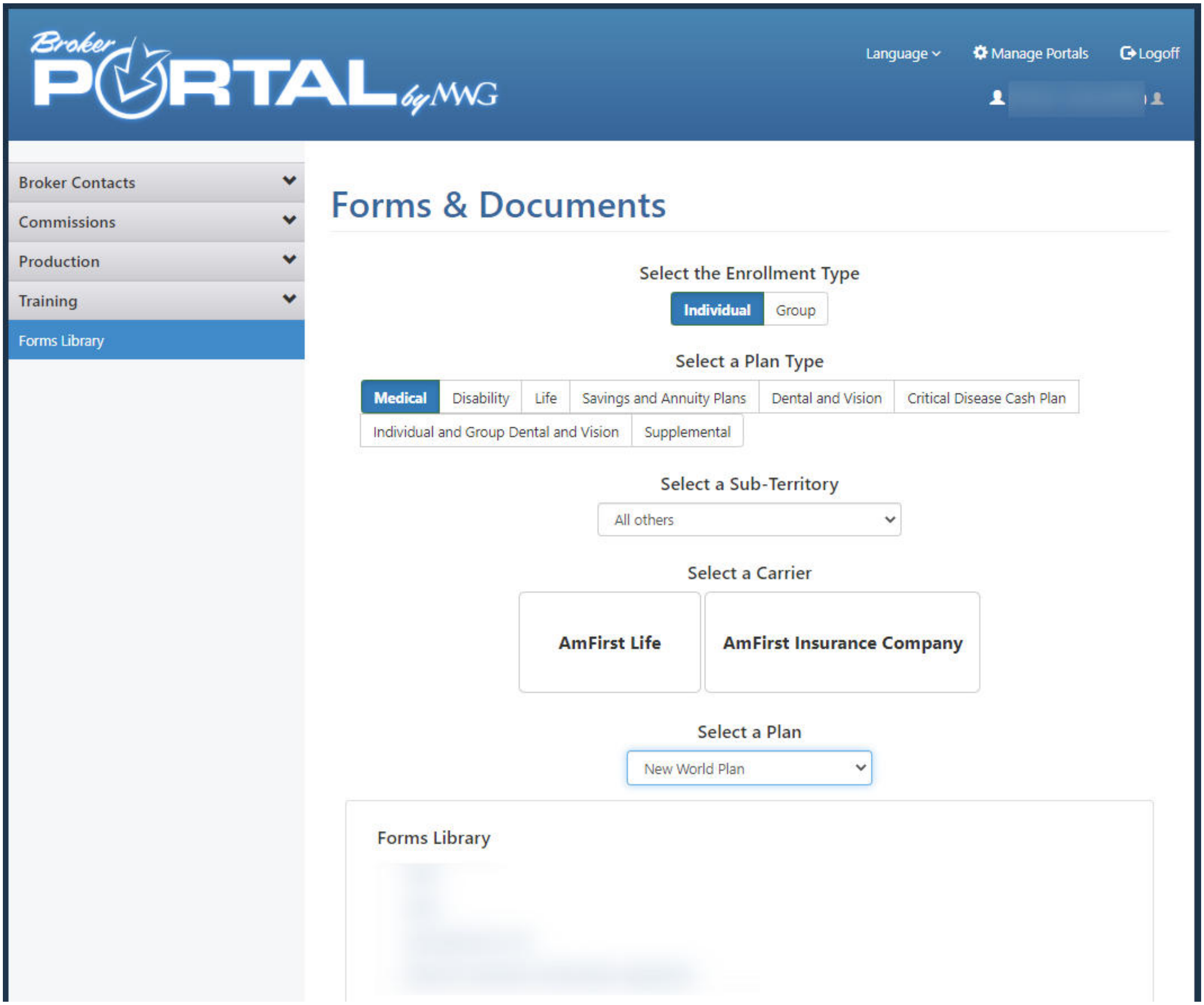
Production Tab

Real Time Enrollment Watcher- Enrollments through your sales platform can be seen in “real time” for brokers who process individual policies, group polices, or both. If you sell a policy on your platform, the successful payment enrollments process directly into one of the two titled production tabs (Individual or Group). From this tab, you will also be able to view Terminated polices.



Forms Library

The “Forms Library” is a tool that allows the broker to select the carrier of choice and access any documents on a product.



Contact information is displayed at the bottom of all tabs for your convenience on the Broker Portal. This serves as a quick reference if you need to contact one of our departments.