

How to: Create a New Agent

Saskatchewan Blue Cross Broker Travel Portal

1. Log into the Broker Travel Platform and from the Home Page, hover over **Administration** and select **Agent Management**. The Administration – Agent Management screen will appear.



2. Select **Add user**



3. Enter an Agent Code in the **User Code:** field (e.g. first initial + last name)
4. Enter a temporary password in the **Password:** field

5. Enter the temporary password in the **Password (Confirmation):** field

6. Check the **Password Expiration** if you want the corresponding Agent to change their password when logging in (i.e. When a user logs in they will be prompted to enter in a new password).

User Code: * [jdoe]

Distributor Number: 21313

Please Note: The password must contain between 8 and 12 characters inclusively, with a minimum of one numerical character. Also, it must be composed of alphanumeric characters only.

Password: * [*****]

Password (Confirmation): * [*****]

Password Expiration?: (Forces user to change password on first login)

First Name: * [jane]

Last Name: * [doe]

Type ID: * [User]

Role Type(s): [Reports]

Cancel email notifications: (Check the box if you no longer wish to receive email notifications about available information on B2B)

Email: * [janedoe@testemail.com]

Status: * [Active]

Save User

* Mandatory Information

7. Enter the Agent's first name in the **First Name:** field
8. Enter the Agent's last name in the **Last Name:** field
9. Select user type
10. Administrator (e.g. can create other users and issue travel policies)
11. User (e.g. standard users that can only issue travel policies)



12. Click **Role Type(s): Reports** if you wish to allow the Agent to run reports (e.g. Account Detail Summary report)
13. Enter the Agent's corresponding email in the **Email:** field.
14. Select Active in the **Status:** field.
15. Click the **Save User** button. The corresponding Agent will receive a B2B Blue Cross Travel email to their email address.
16. The Agent can now log into the Broker Travel Platform with the temporary password.

Note – The Agent will have 3 days to log into their Broker Travel Platform.

