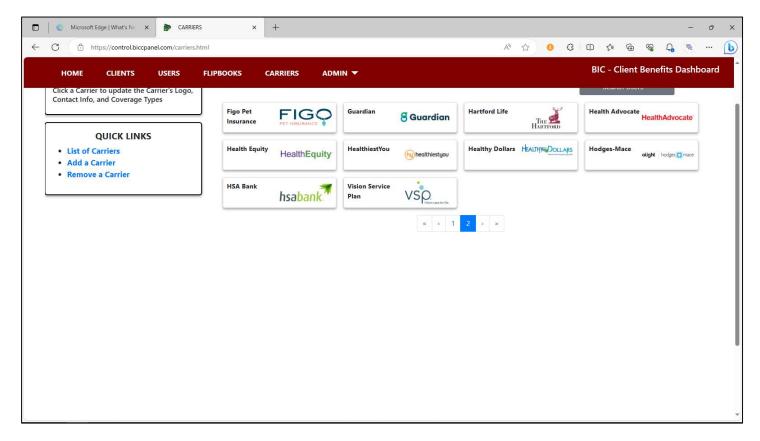
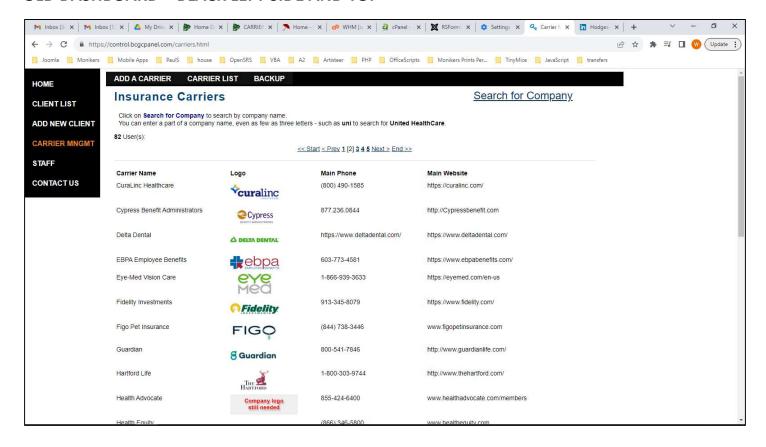
### **ADDING A NEW CARRIER**

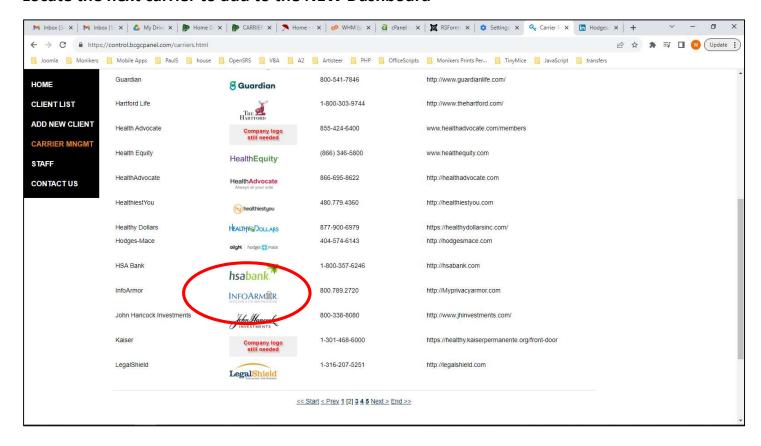
#### **NEW DASHBOARD WITH RED AT TOP**



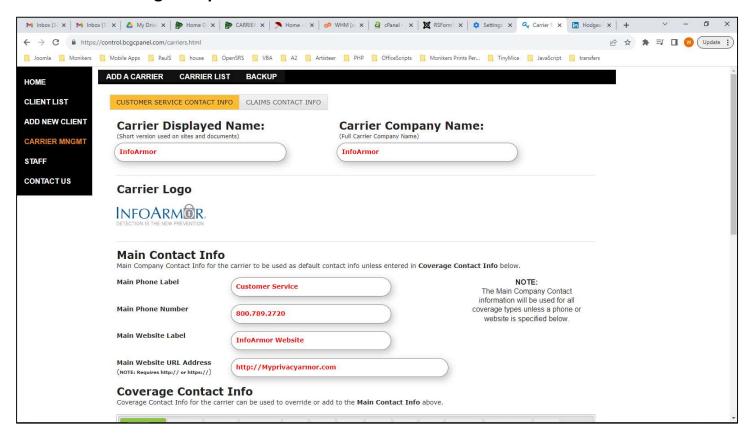
#### **OLD DASHBOARD – BLACK LEFT SIDE AND TOP**



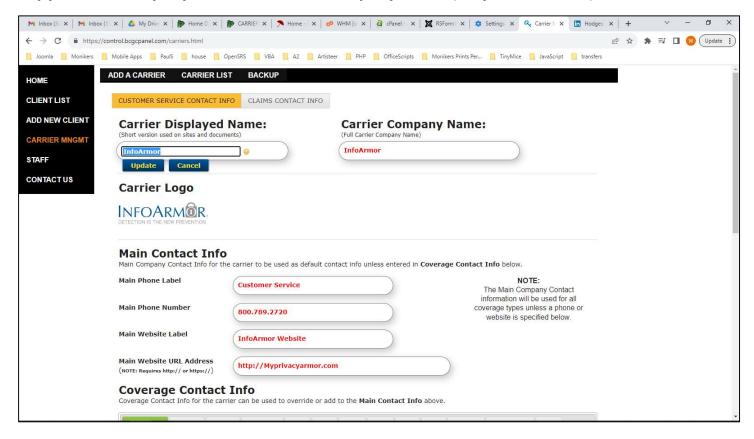
#### Locate the next carrier to add to the NEW Dashboard



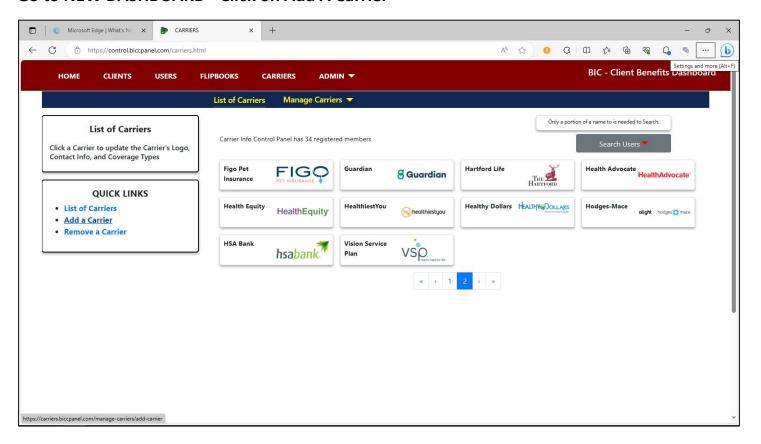
### Click on Carrier Logo to open account



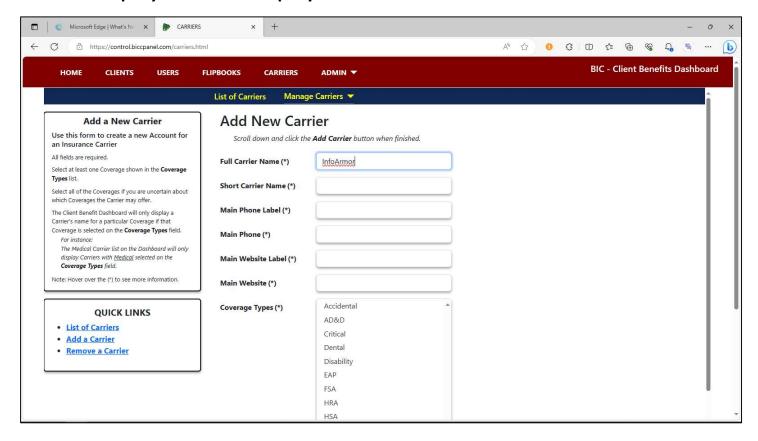
## Copy Carrier Company Name and Short Company Name (may be the same)



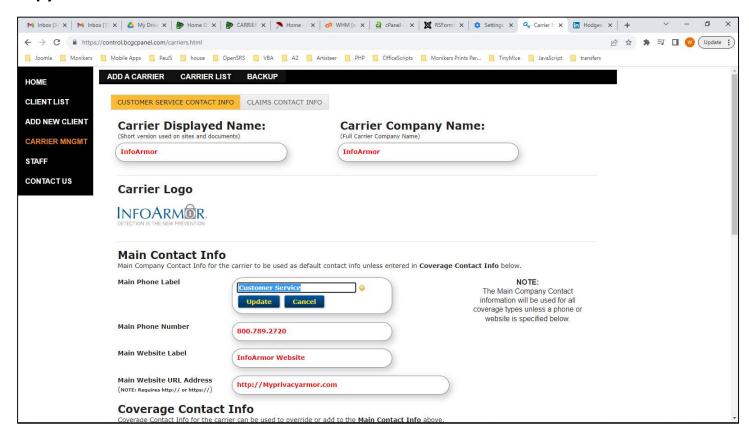
#### Go to NEW DASHBOARD - Click on Add A Carrier



### Past the Company and Short Company names in the field boxes

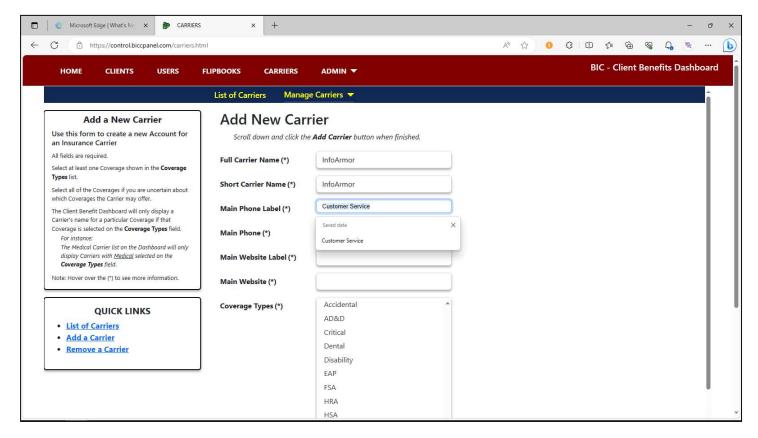


### Copy the Main Phone Label & Number and the Main Web URL Address and Label for the link.



Paste them into the appropriate field boxes.

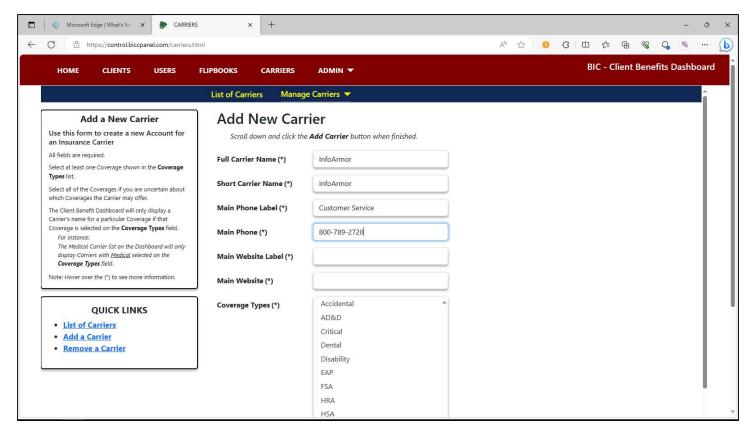
If it is a common label, you should be able to just type in the first few letters.

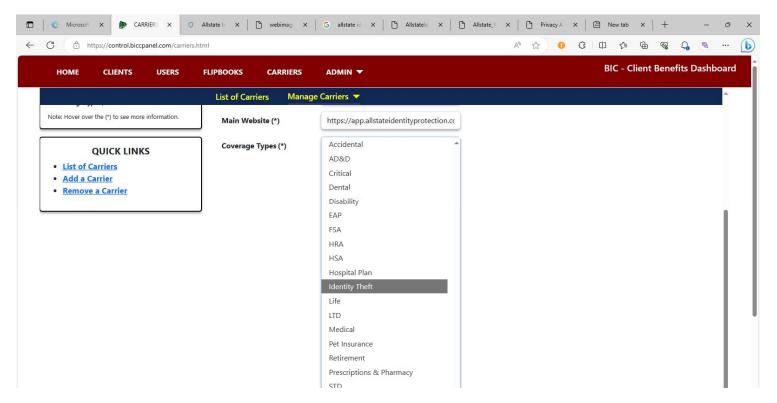


NOTE – Phone numbers must be in the format: xxx-xxx-xxxx – dashes only, no periods or parenthesis.

URL Addresses must contain https:// no http://

FYI - www and capitals are irrelevant – they can be added or left off.

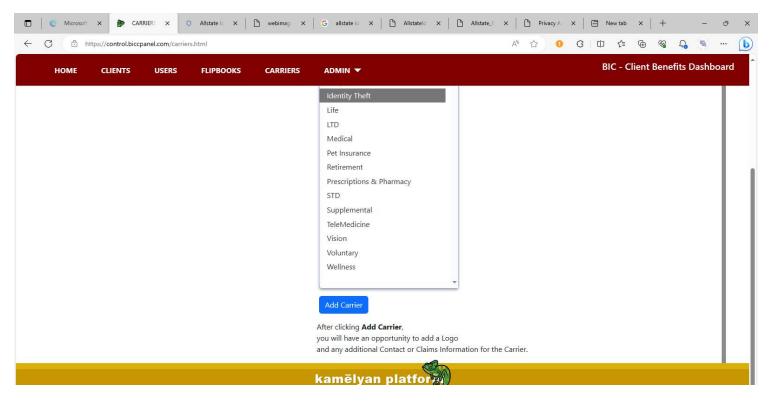




To select multiple, if the are concurrent, click one and drag down the list to select more. To select different coverages that are not concurrent, click one, then hold down the ctrl key while selecting others.

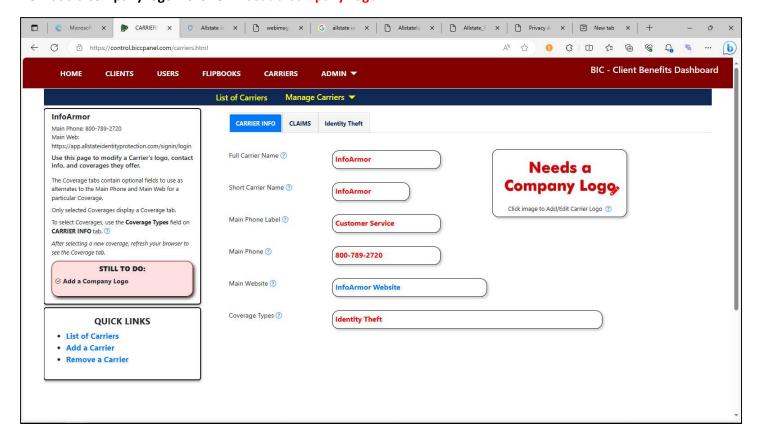
If it is unknown what coverages the carrier provides, it is better to select all.

Scroll down to click Add Carrier

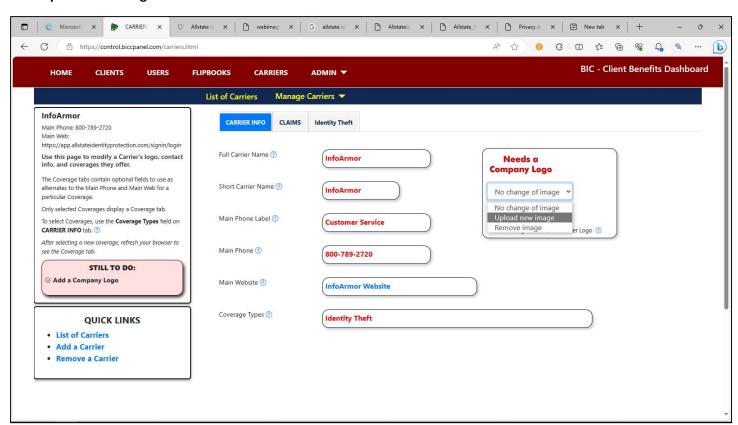


NOTE – the tabs on the following page will only show the selected Coverage Types.

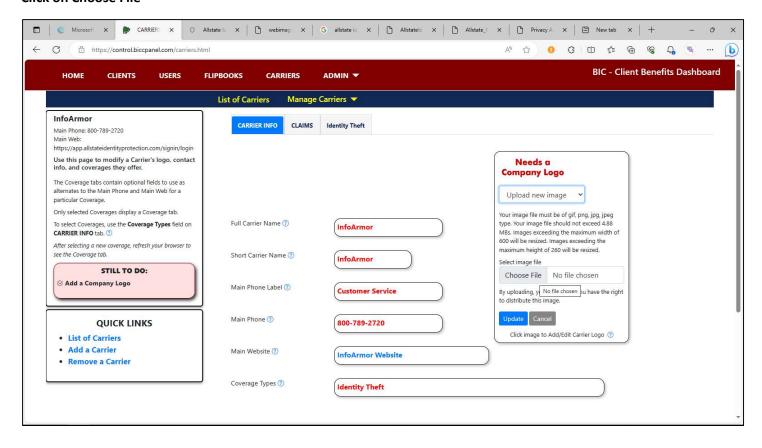
#### Now add a company logo - click on Needs a Company Logo



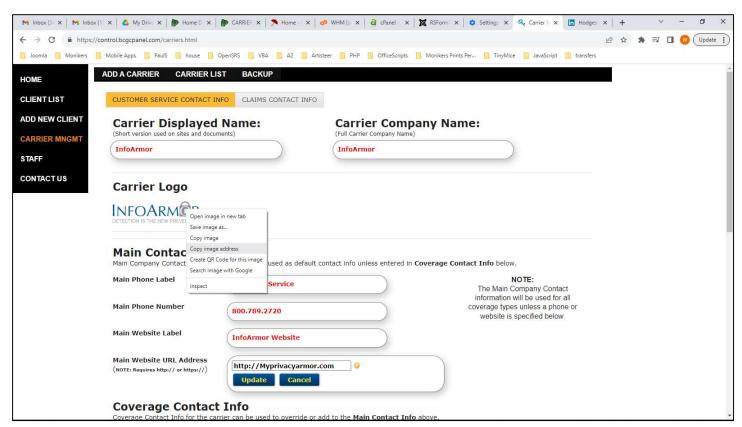
#### **Click Upload new Image**



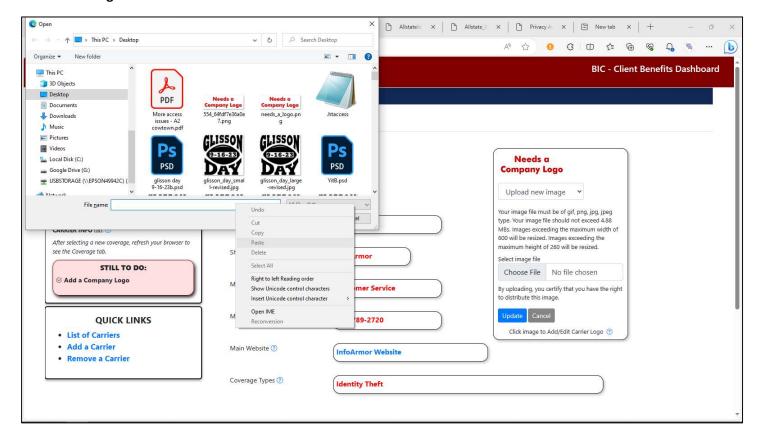
#### **Click on Choose File**



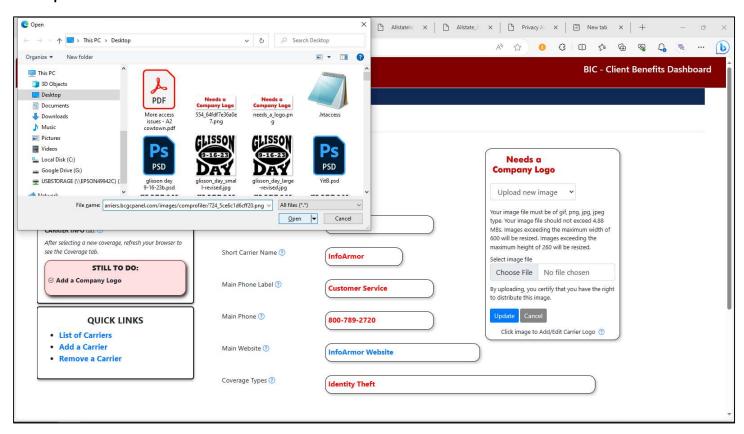
#### Go back to the Old Dashboard and Right-Click the logo and select "Copy image address"



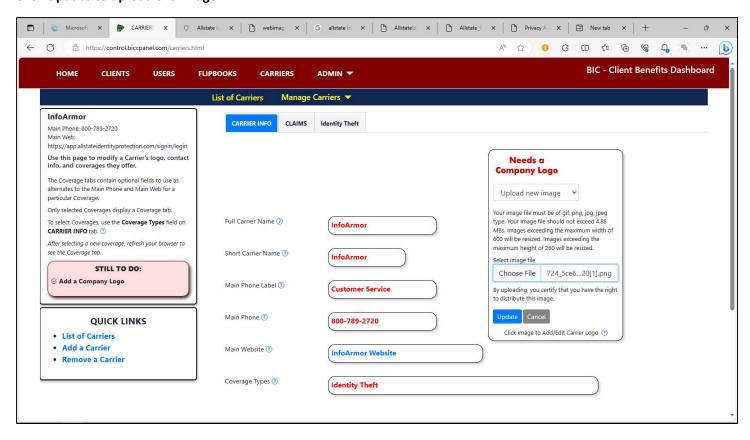
Go back to the New Dashboard and paste the address into the File name box. Use ctrl V or right click the box and select Paste.

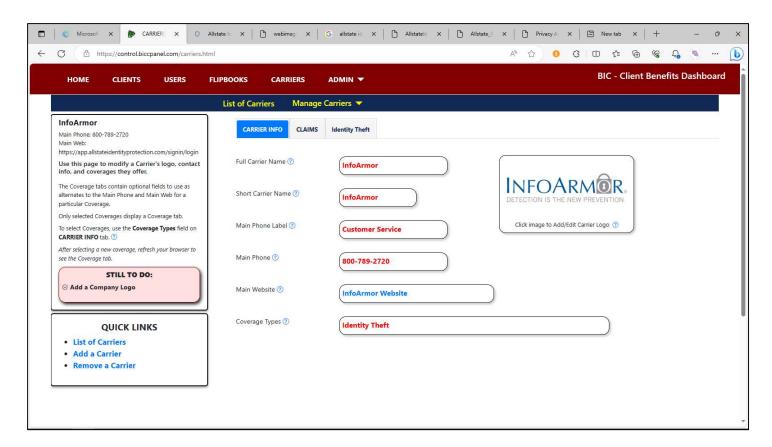


#### Click Open

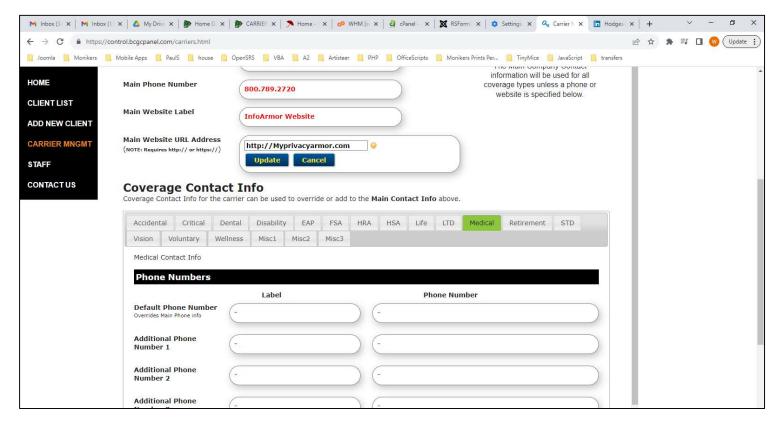


#### Click Update to upload the image.

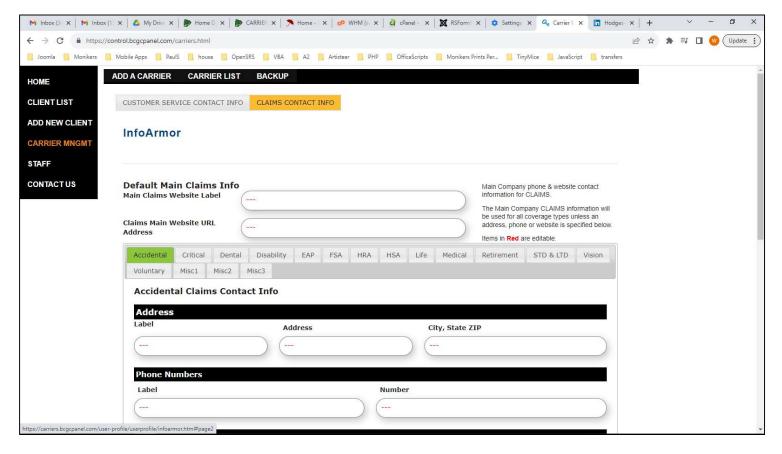




Next – click on each tab to see if there are additional phone or web entries. Most will not, but need to check anyway. Misc 1 - 3 will not have any extra info.

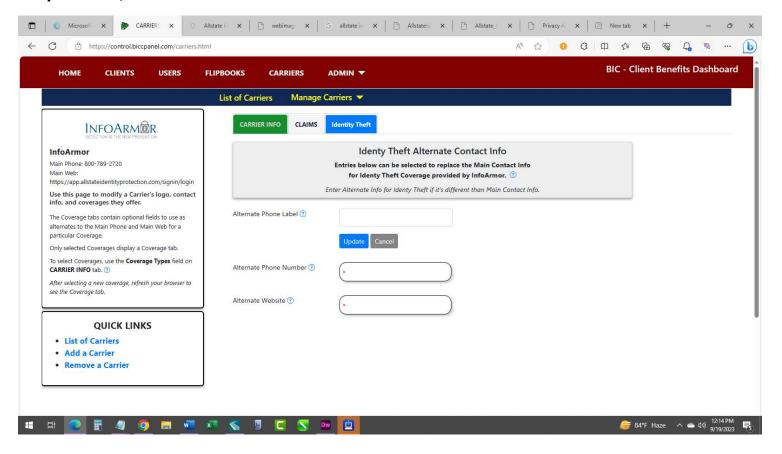


Scroll up & click on the CLAIMS CONTACT INFO tab. Check to see if there are any Claims entries. Again – most do not, and if they do – it is usually just the Main Claims info.

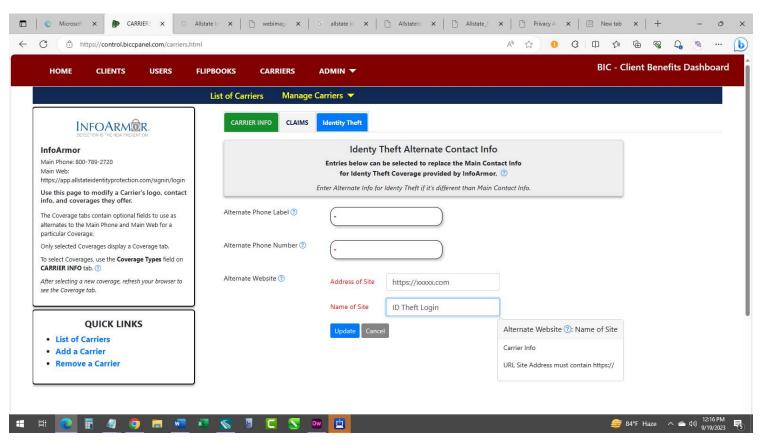


If there is any Alternate or Additional Phone or Web Info – Click on the appropriate tab and enter the info.

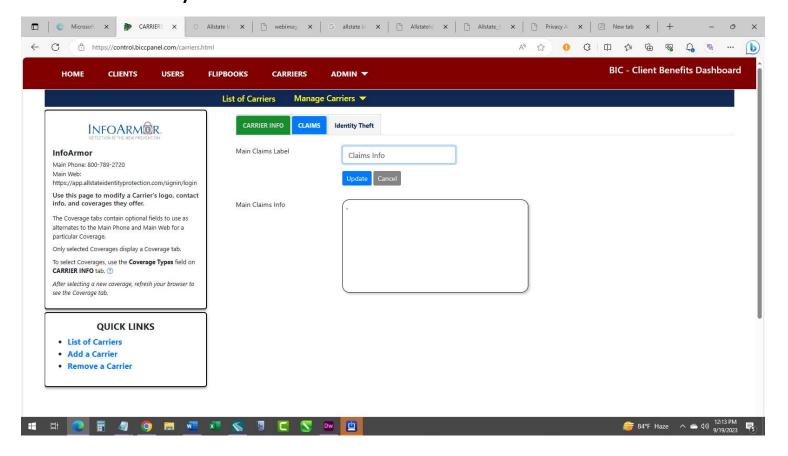
Only Medical, Dental and Vision have Additional Phone and Web fields



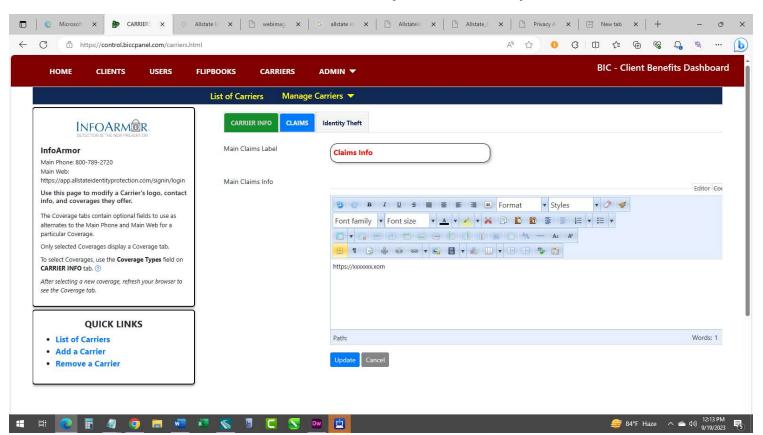
## Add Phone and or web info and click Update.

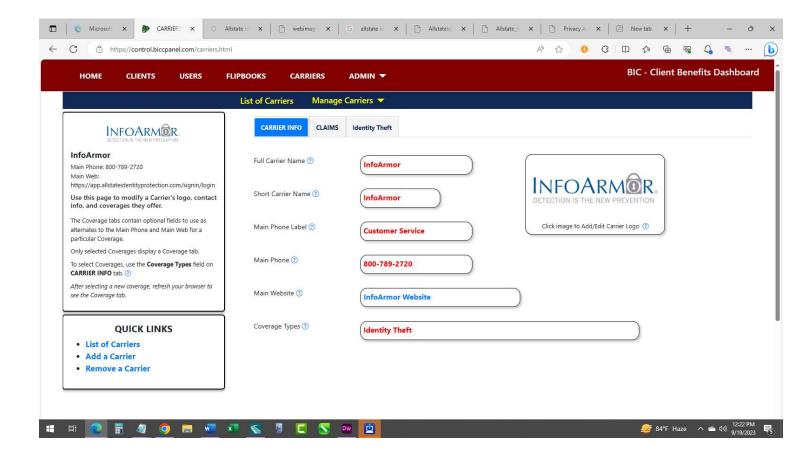


# If there is any Claims info – add it on the CLAIMS tab. Enter a label – usually Claims Info or similar.



## Next – enter the info. The edit window will allow you to add multiple entries if needed.





# THAT'S IT - click on the List of Carriers on the old Dashboard and go to the next one.

