UTICA FIRST
INSURANCE COMPANY

Utica First

Agency Link

Quick Tips

Initial Login

The Agency Link Login Screen accepts the entry of your User ID (for example, UISAgent) followed by your password (remember your password is case sensitive). You no longer need to enter the **Ufirst** prefix on the User Id like you did for iSolutions.

Note also you EITHER mouse-click on the **Login** button or hit <Enter> to successfully log-in.

Enter your login credentials below to gain access to the system.

User ID (for example, UISAgent) followed by your (case sensitive) password. The "ufirst\" prefix is no longer needed.
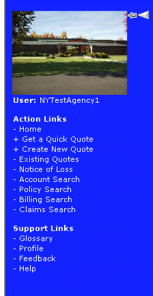
User ID: [   ]

Password: [   ]
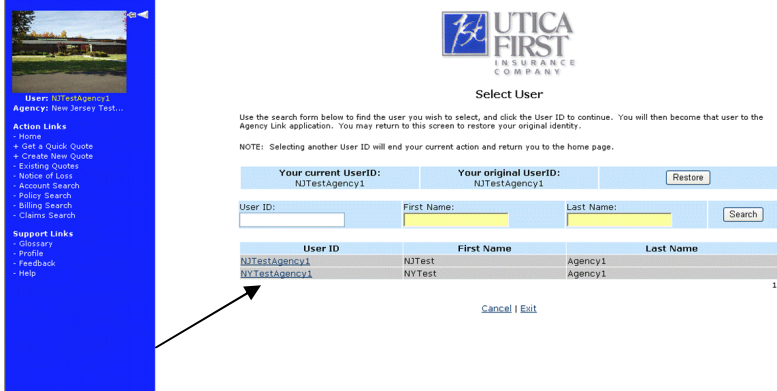
[Login]   [Change Password]

Using Scroll Bars to See Entire Screen

If you are viewing any Agency Link screen on a smaller monitor (for example, a laptop) or you are using Agency Link in minimized form (not under the full screen), scroll bars will appear on the right or bottom. This will allow you to scroll to view all the information on the screen. In other words, if you see scroll bars on the right or bottom, there is information on the screen not currently in your view. This becomes critical when there are required fields out of your view that need entry in order for you to have no errors. If you get an error window and you can not see the field mentioned in the error, use the scroll bars to get to that field.
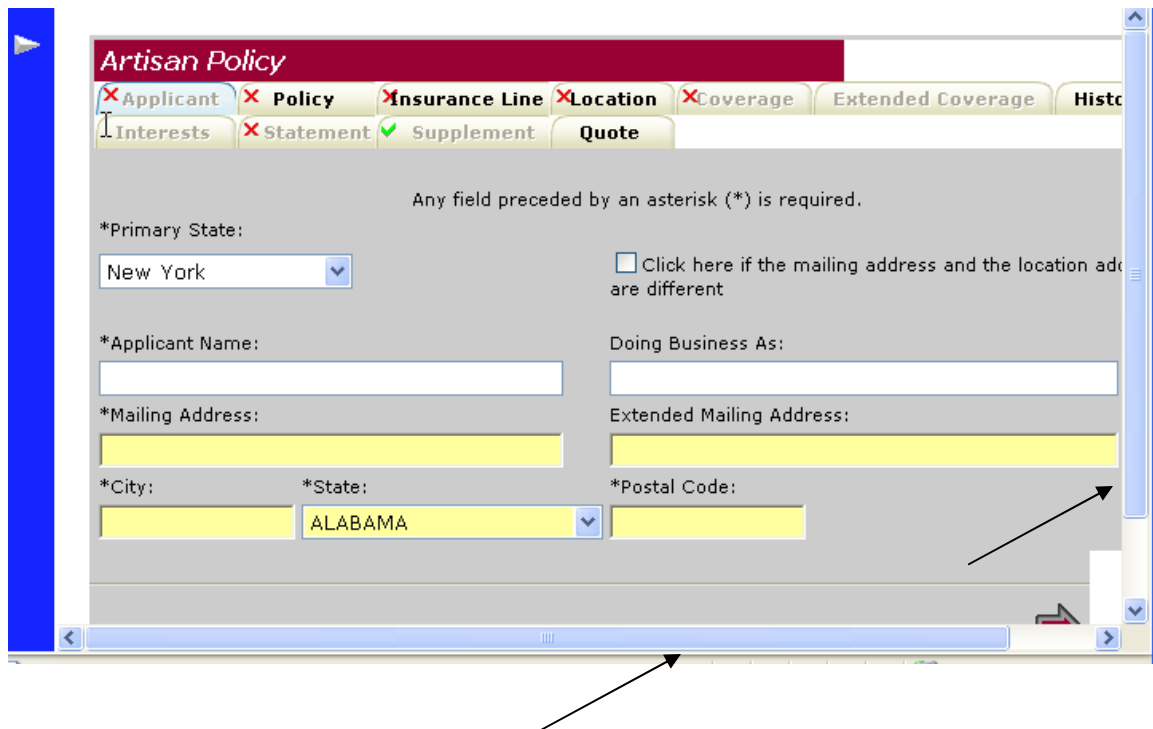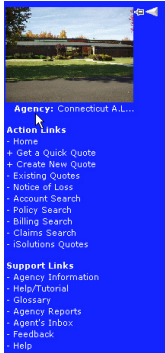
Doing Work as Another Agent

Mimicking (viewing another agent's quotes or inquirying on his policies)	**1.**	If you have the authority to do work as another agent (for example, a New York agent reviewing his Pennsylvania subcode or an agent with 6 sub-coded offices reviewing one of the other offices besides his own), and need to do so, click on User in the left frame. Result: The Select User screen will display.
	2.	Click on the user id (agent) you want to do work as. Result: The home page will be displayed, this time showing the new agent as a "mimick".
	3.	Notice the original agent is shown, but all work will now be done as the mimicked agent.

Doing Work as Another Agent, Continued

4.	If you have the authority to quote as another agent (for example, a New York agent quoting as his Pennsylvania subcode or an agent with 6 sub-coded offices quoting as one of the other offices besides his own), and need to do so, click on Agent in the left frame.
	Result: The Select Agency screen will display.
5.	Click on the Agency ID (and state) you want to do work as.
	Result: The home page will be displayed, this time showing the new agent selected.
6.	Notice the original agent is *not* shown. Instead, the agent you switched to will be displayed.
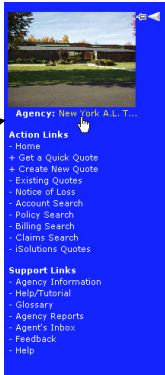
Doing Work as Another Agent, Continued

Quoting as a different Agent (continued)

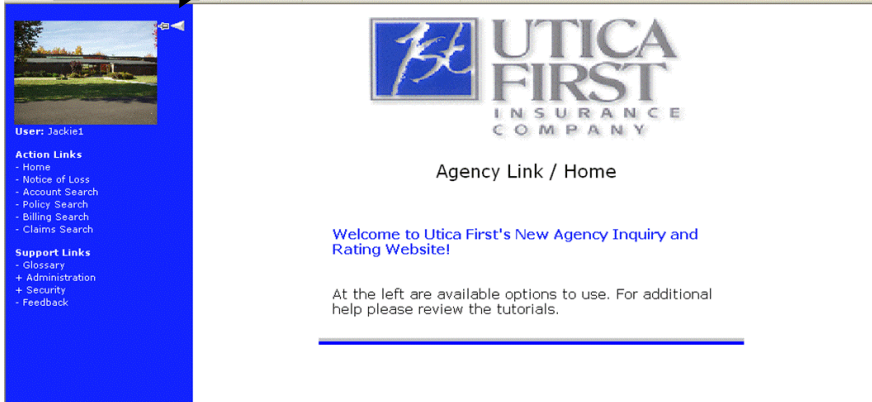| 5.	Notice that now when you Create a New Quote, the State Code will be the one you switched to
	Result: In this case, the original user was the Connecticut agent. When the New York agency was chosen, all quotes now will be for New York.

Left Frame View

Left Frame View	**1.**	To make the Left Frame menu stay displayed, click on the Stick Pin. **Result:** When the Stick Pin is clicked to point down, the blue Left Frame will always display no matter what screen you are on.
	2.	Clicking the Stick Pin to point left will make the left frame minimize. **Result**: When the Stick Pin on the Left Frame is clicked, the Left Frame will be minimized no matter what screen you are on. To get back to the Left Frame, just click on the silver arrow.
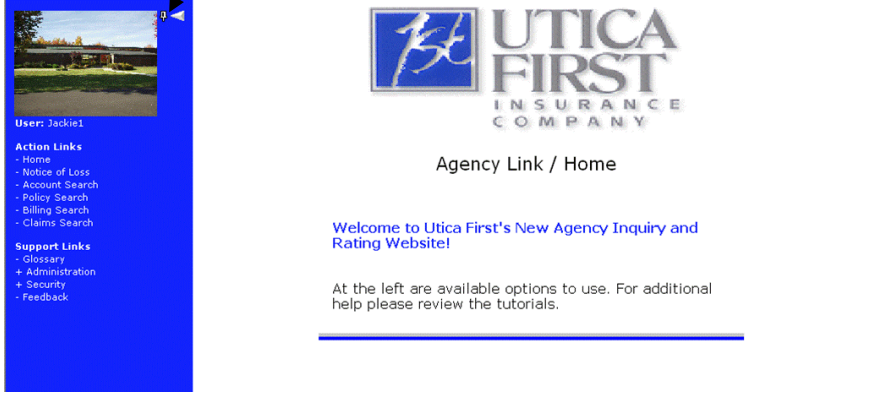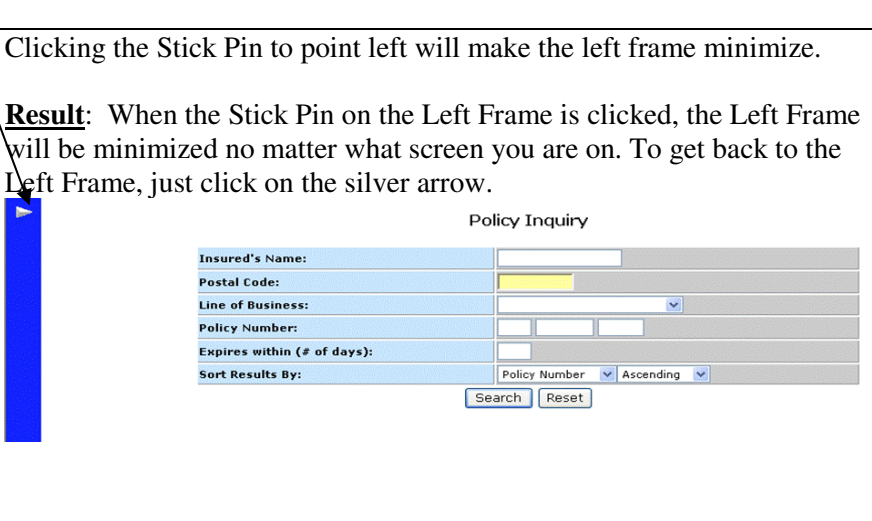
Extended Coverage Screen

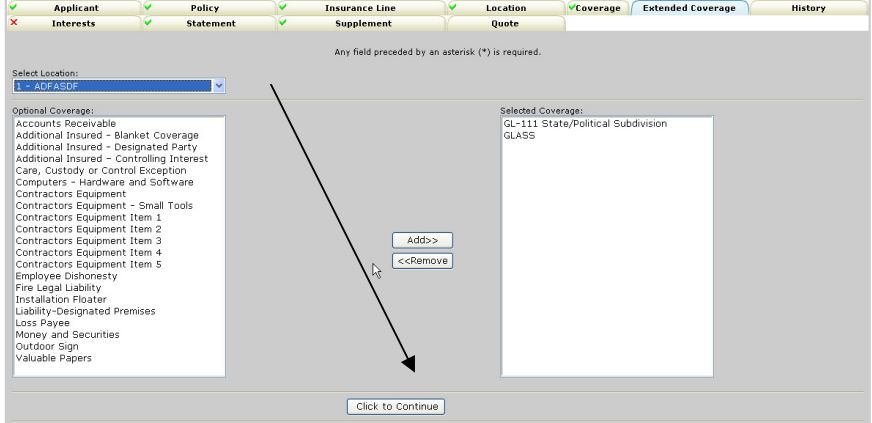|		
Extended Coverage Screen	1.	You can access the *Extended Coverages* screen by using the red navigation button or by clicking on the |**Extended Coverage**| tab in the browser window. Result: A list of available Extended Coverages is displayed for this Location/Building. Note: You can select multiple coverages by clicking on the coverage while holding down the <Ctrl> key**.**
	2.	Add the *Extended Coverage(s)* by clicking the **Add** button. Result: The coverage name(s) appear(s) to the Left of the window.
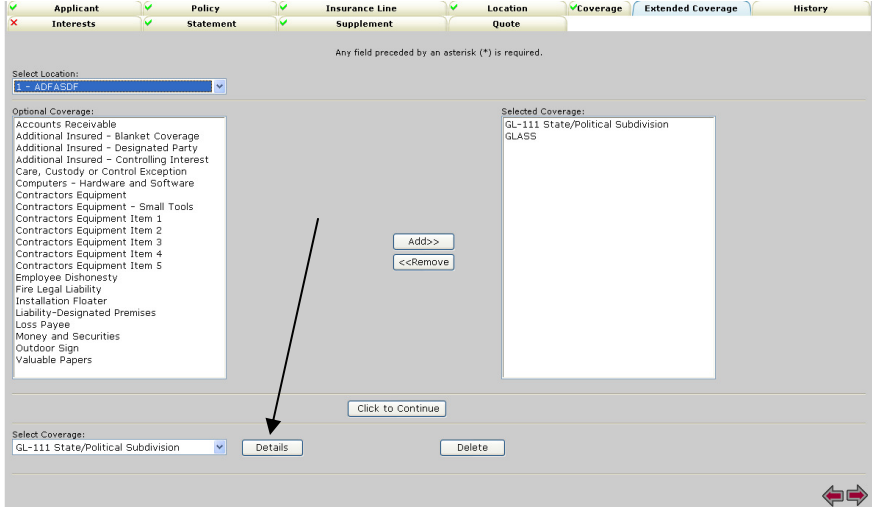
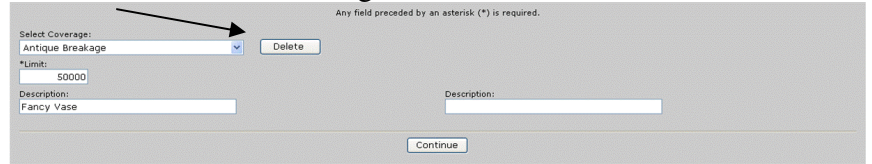| Extended Coverage Information (Continued)	3.	Use your mouse to click on the **Click to Continue** button for entry of coverage details.
	4.	Click on the **Details** button to enter coverage details.
	5.	Enter details for this coverage. Note: You can use the dropdown to move to the next coverage. To save Information click one of the tabs to navigate to a new page.