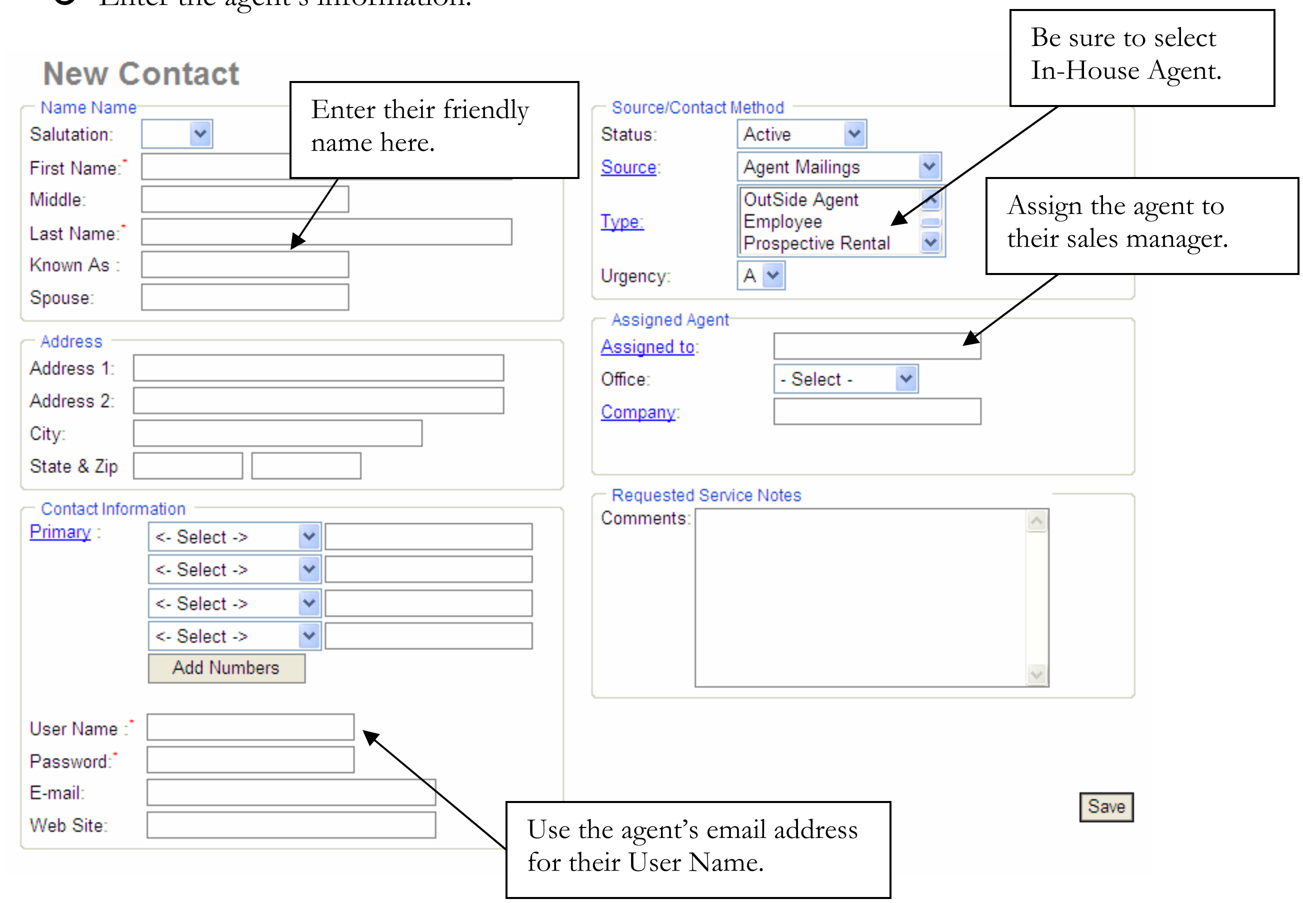
Entering a New Agent Through the Contact Module

You can add anyone to the system through the contact module, even if they are an in-house agent or employee. Before entering and in-house agent, be sure you are logged in with office admin, or company admin rights.

❶ Log in as an administrator.
❷ Point to Contacts and click New.
❸ Enter the agent's information.



❹ After you click Save, you can enter the agent's license number, and other information on the Agent tab.