



## MyProtective.com Sub-user setup process

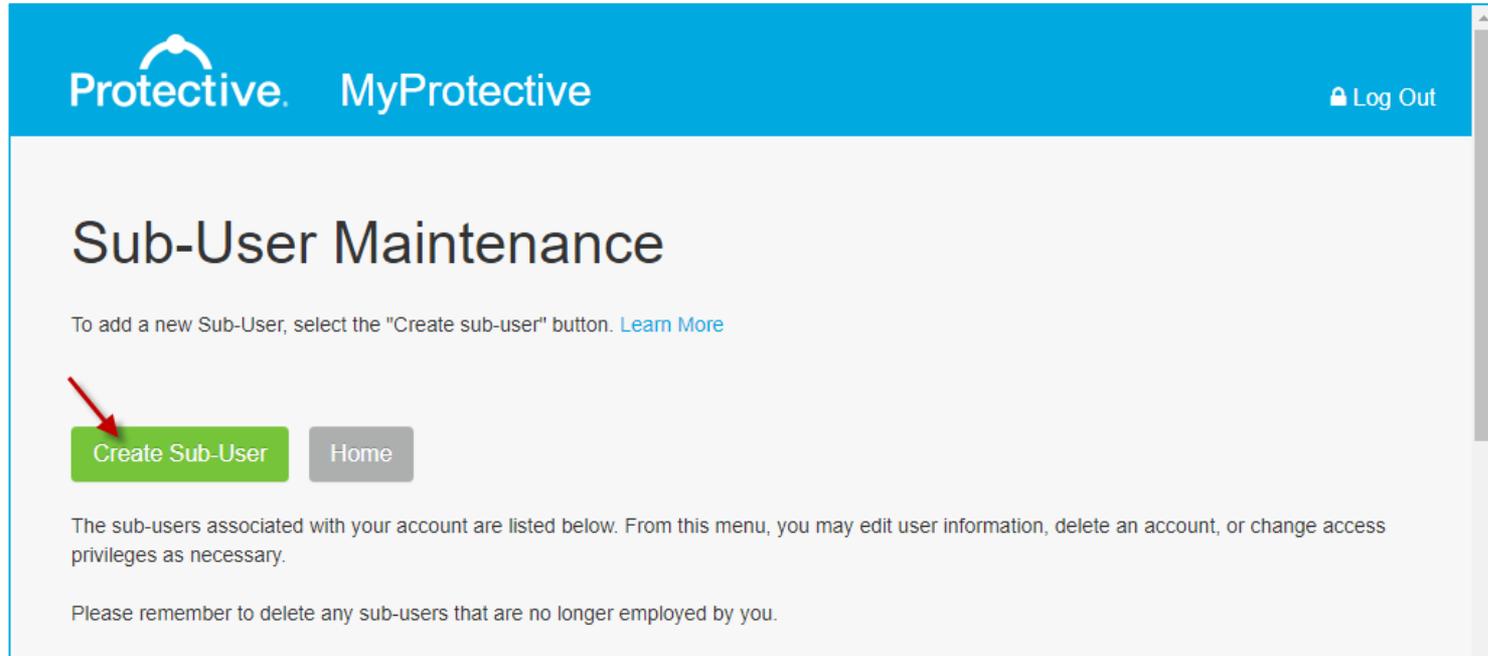
January 2021

## Sub-user creation process

# Step 1: Primary users log into MyProtective.com and navigate to Manage Sub-Users maintenance page.

The screenshot displays the user interface of MyProtective.com. At the top right, there is a search bar and a user profile icon circled in red. A white notification box is overlaid on the dashboard, containing the text "Welcome, Life Agent Services Guest!" and a list of menu items: "Change Password", "Change Password Help Question & Answer", "Change Email Address", "Change EPD Email Address", "Manage Pending Business Email Notifications", "Change Default Agent Number", "Electronic Funds Transfer (EFT)", and "Manage Sub-Users". The "Manage Sub-Users" option is highlighted with a yellow background. Below the notification box, the main dashboard area features the heading "My Dashboard" and "Welcome, Life Agent Services Guest!". At the bottom, there are three main sections: "Pending Business" with a large number "11", "Existing Business", and "Quick Access".

## Step 2: Primary users click the “Create Sub-User” button.



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### Sub-User Maintenance

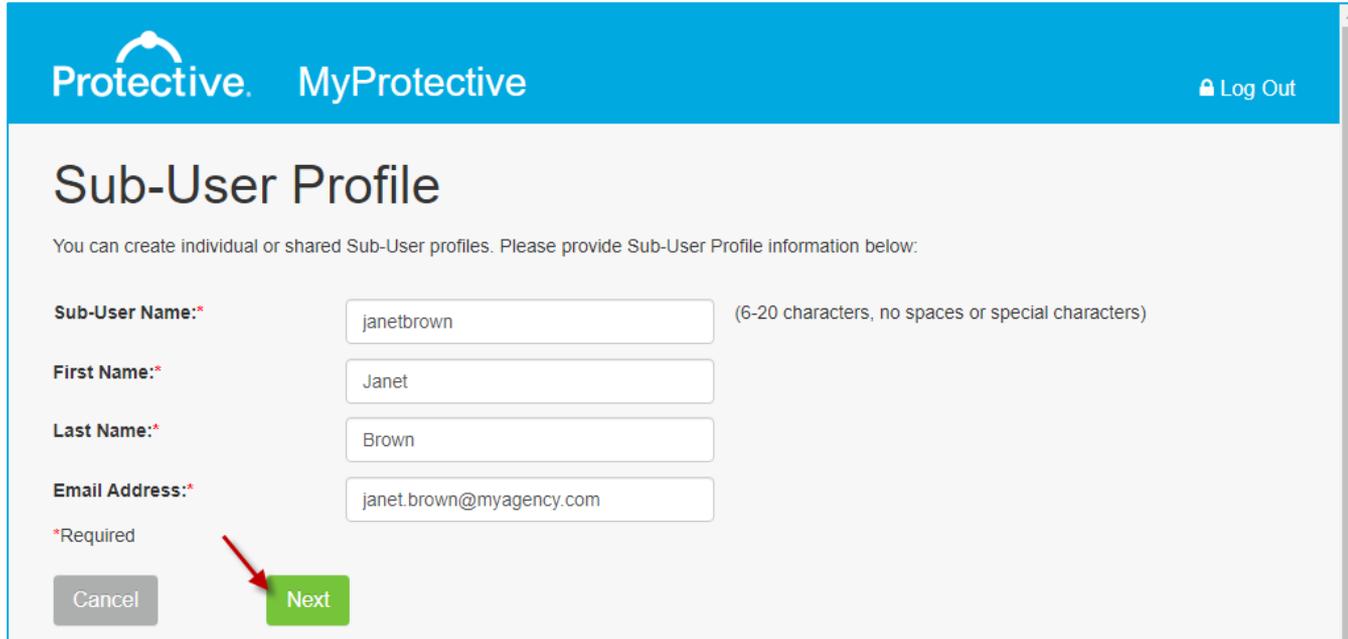
To add a new Sub-User, select the "Create sub-user" button. [Learn More](#)

 Create Sub-User Home

The sub-users associated with your account are listed below. From this menu, you may edit user information, delete an account, or change access privileges as necessary.

Please remember to delete any sub-users that are no longer employed by you.

## Step 3: Primary users enter profile information for sub-users.



The screenshot shows a web interface for 'Protective MyProtective'. The page title is 'Sub-User Profile'. Below the title, there is a instruction: 'You can create individual or shared Sub-User profiles. Please provide Sub-User Profile information below:'. The form contains four input fields: 'Sub-User Name:\*' with the value 'janetbrown' and a note '(6-20 characters, no spaces or special characters)'; 'First Name:\*' with the value 'Janet'; 'Last Name:\*' with the value 'Brown'; and 'Email Address:\*' with the value 'janet.brown@myagency.com'. At the bottom left, there are two buttons: a grey 'Cancel' button and a green 'Next' button. A red arrow points to the 'Next' button. The top right corner has a 'Log Out' link.

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### Sub-User Profile

You can create individual or shared Sub-User profiles. Please provide Sub-User Profile information below:

**Sub-User Name:\***  (6-20 characters, no spaces or special characters)

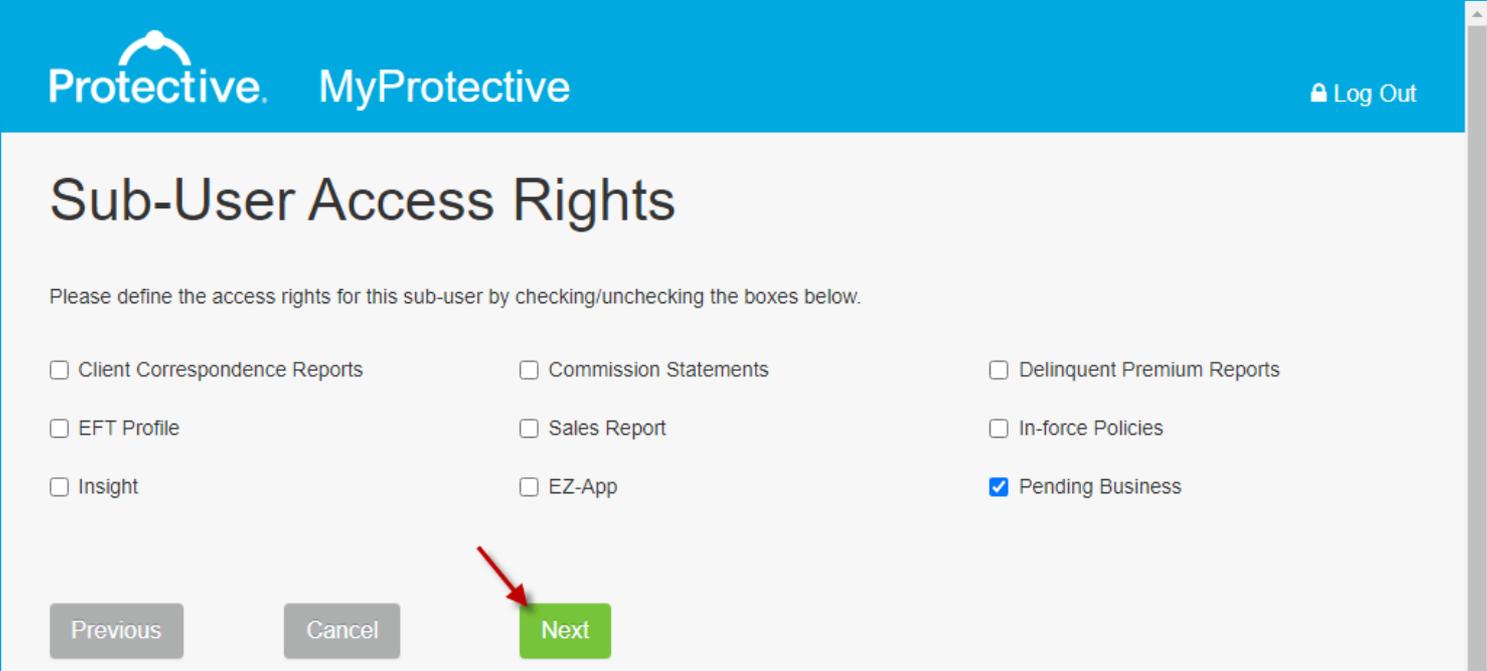
**First Name:\***

**Last Name:\***

**Email Address:\***

\*Required

## Step 4: Primary users select access rights.



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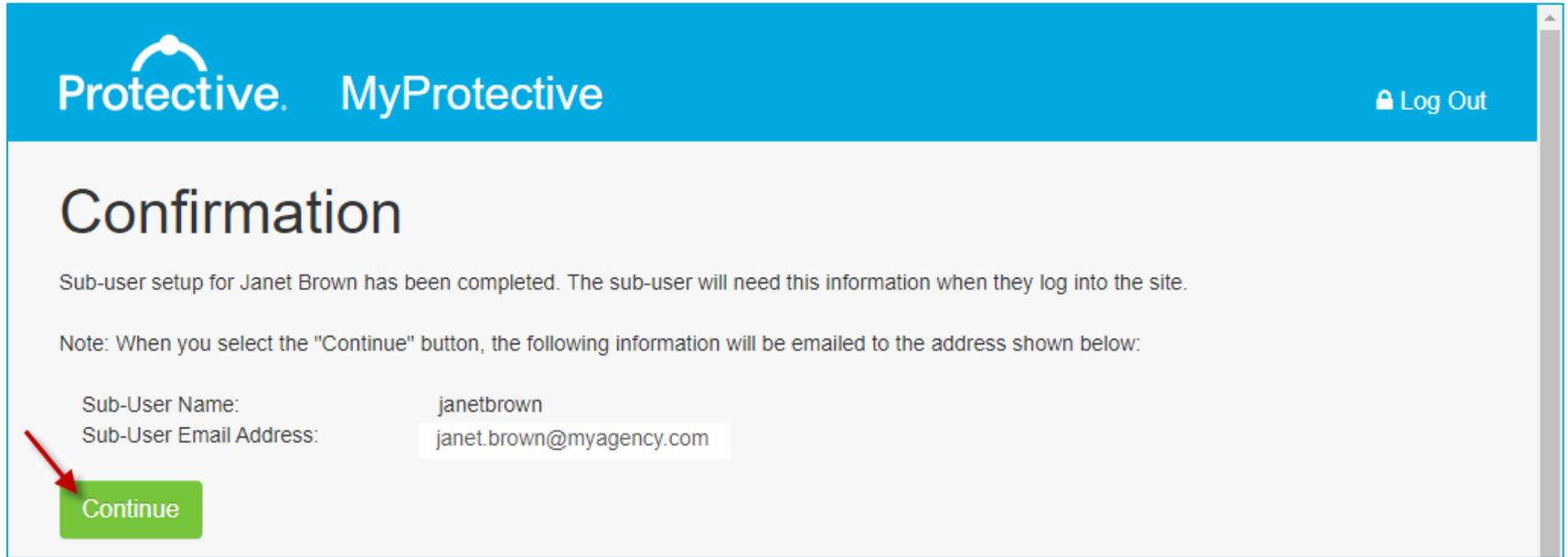
### Sub-User Access Rights

Please define the access rights for this sub-user by checking/unchecking the boxes below.

<input type="checkbox"/> Client Correspondence Reports	<input type="checkbox"/> Commission Statements	<input type="checkbox"/> Delinquent Premium Reports
<input type="checkbox"/> EFT Profile	<input type="checkbox"/> Sales Report	<input type="checkbox"/> In-force Policies
<input type="checkbox"/> Insight	<input type="checkbox"/> EZ-App	<input checked="" type="checkbox"/> Pending Business

Previous Cancel Next

Step 5: Primary users confirm information and click “Continue” to email registration details to the sub-user for password setup.



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## Confirmation

Sub-user setup for Janet Brown has been completed. The sub-user will need this information when they log into the site.

Note: When you select the "Continue" button, the following information will be emailed to the address shown below:

Sub-User Name:	janetbrown
Sub-User Email Address:	janet.brown@myagency.com

[Continue](#)

## Step 6: New sub-user account appears on the maintenance page.

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### Sub-User Maintenance

To add a new Sub-User, select the "Create sub-user" button. [Learn More](#)

[Create Sub-User](#) [Home](#)

The sub-users associated with your account are listed below. From this menu, you may edit user information, delete an account, or change access privileges as necessary.

Please remember to delete any sub-users that are no longer employed by you.

User Name	FName	LName	Email				
janetbrown	Janet	Brown	janet.brown@myagency.com	Edit	Delete	Change Access	Send Reset Email

## Sub-user password setup

# Step 1: Sub-user receives registration email with a link to set up a password (link expires after 24 hours).

**Protective Website Registration Confirmation**

 cmsemail@protective.com  
To

Retention Policy Entire Mailbox - 180 Day Delete (6 months) Expires 5/12/2021

Reply Reply All Forward ...

Fri 11/13/2020 5:08 PM

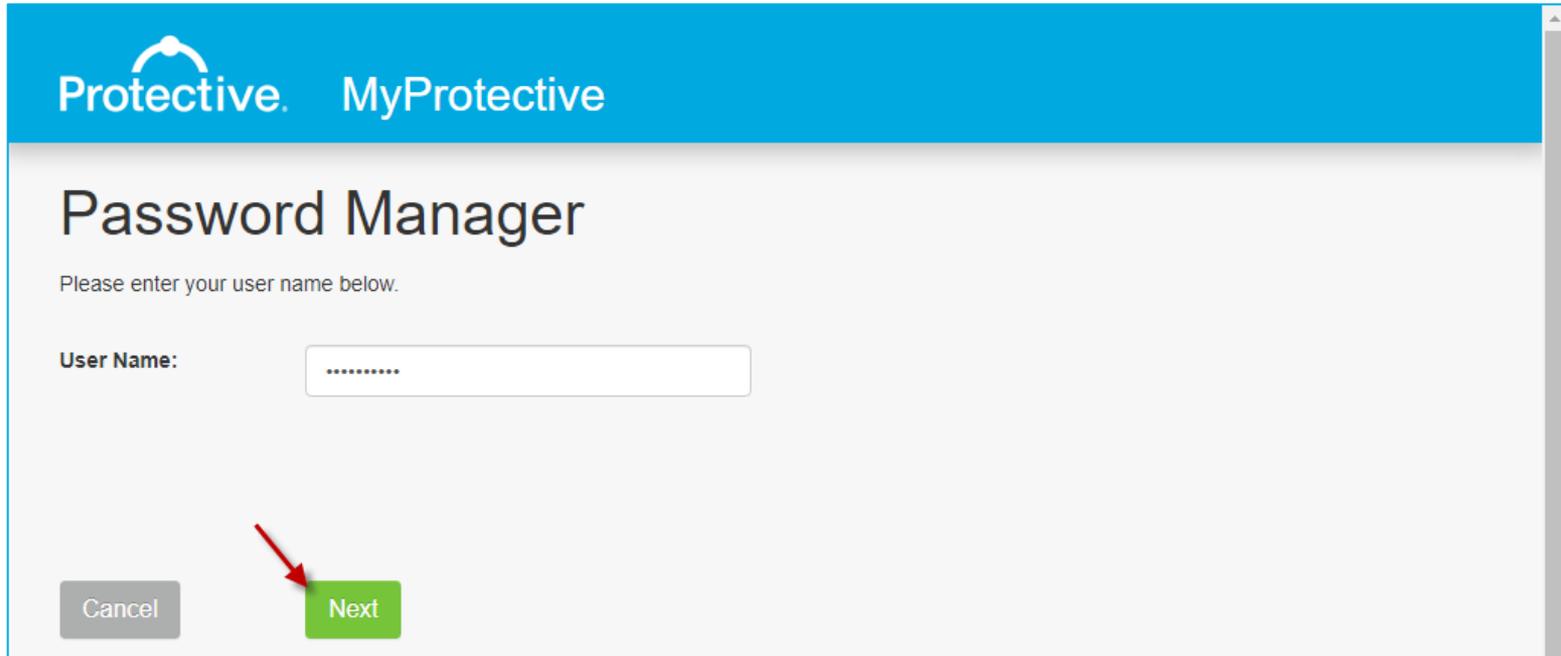
A MyProtective account has been created for you. Your user name is provided below.

[Set up your password here](#)

User Name: janetbrown

This link will expire after 24 hours.

Step 2: Sub-user enters user name listed in the email.



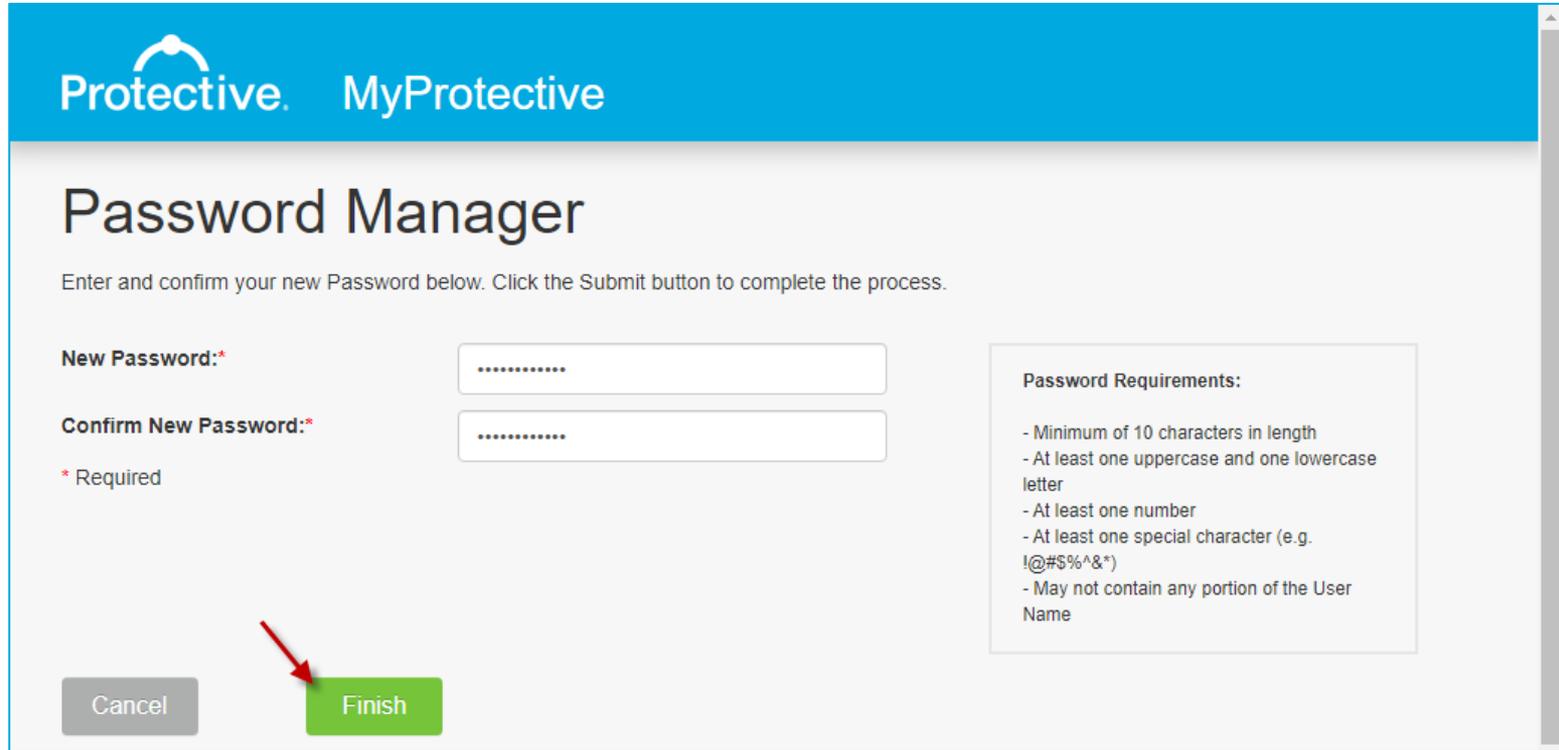
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## Password Manager

Please enter your user name below.

User Name:

## Step 3: Sub-user creates a secure password that matches the requirements listed.



The screenshot shows the 'MyProtective Password Manager' interface. At the top, there is a blue header with the 'Protective.' logo and the text 'MyProtective'. Below the header, the title 'Password Manager' is displayed. A instruction reads: 'Enter and confirm your new Password below. Click the Submit button to complete the process.'

There are two input fields for password creation:

- New Password:\*** with a masked input field containing ten dots.
- Confirm New Password:\*** with a masked input field containing ten dots.

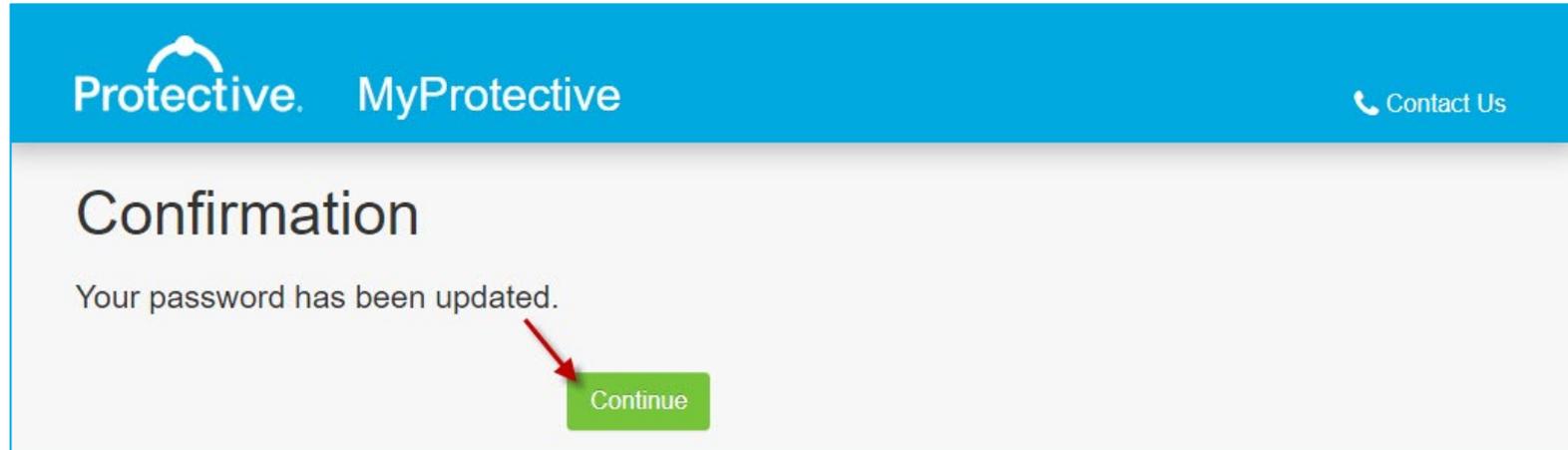
A note below the fields states: '\* Required'.

To the right of the input fields is a box titled 'Password Requirements:' containing the following list:

- Minimum of 10 characters in length
- At least one uppercase and one lowercase letter
- At least one number
- At least one special character (e.g. !@#\$\$%^&\*)
- May not contain any portion of the User Name

At the bottom left, there are two buttons: a grey 'Cancel' button and a green 'Finish' button. A red arrow points to the 'Finish' button.

Step 4: Sub-user clicks “Continue” to confirm new password and also receives a confirmation email.



## Step 5: Sub-user is taken to a MyProtective.com log in page for access.

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### Welcome to MyProtective

- Manage your business on the go with our mobile-friendly site
- Get policy alerts and access forms from your visual dashboard
- Find marketing brochures, presentations and sales materials quickly with our new search tool

**LOG IN**

**User Name** [Forgot Username?](#)  
janetbrown

**Password** [Forgot Password?](#)  
.....

Remember Me **LOG IN**

I'm not registered. [Register for an account](#)

## Step 6: Sub-user chooses a security question.

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### Setup Password Help Question and Answer

It has been determined that you currently do not have a password help question and answer. In the event you forget your password this information will be used to allow you to reset it. You are required to provide a help question and answer before continuing to the website.

**User Name:**

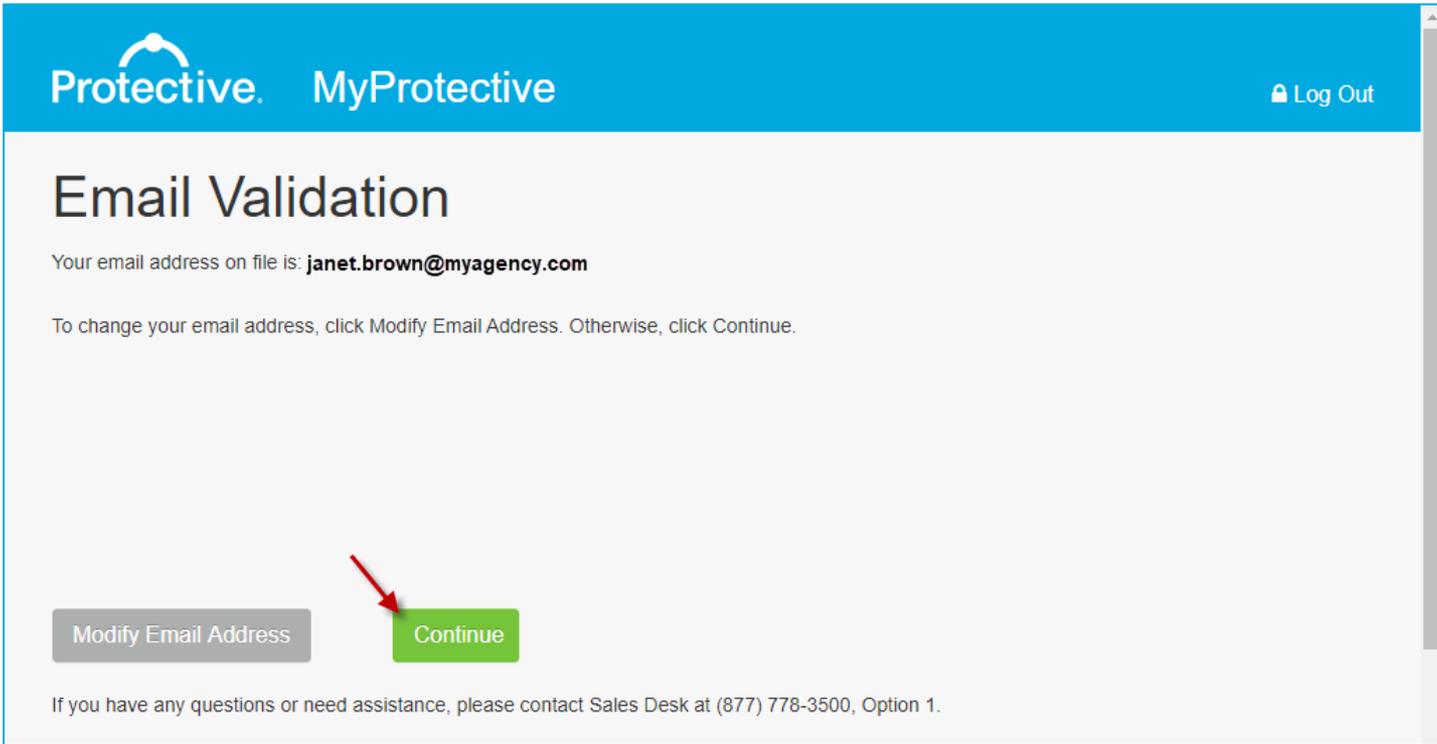
**Password Help Question: \***

**Password Help Answer: \***

**Confirm Answer: \***

[Learn more](#)

## Step 7: Sub-user reviews email address for accuracy.



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### Email Validation

Your email address on file is: **janet.brown@myagency.com**

To change your email address, click **Modify Email Address**. Otherwise, click **Continue**.

**Modify Email Address** **Continue**

If you have any questions or need assistance, please contact Sales Desk at (877) 778-3500, Option 1.

## Step 7: Sub-user successfully logs in.

The screenshot displays the MyProtective dashboard interface. At the top, the 'Protective.' logo is on the left, and 'MyProtective' is in the center. To the right of the logo is a search bar with a magnifying glass icon and a user profile icon. Below the logo, there are navigation links: 'Contact Us' (with a phone icon), 'My Site Links' (with a star icon), and 'Log Out' (with a lock icon). A horizontal menu below these links contains four categories: 'MY BUSINESS', 'PRODUCTS & SOLUTIONS', 'MARKETING RESOURCES & TOOLS', and 'WORKING WITH PROTECTIVE'. The main content area features a large image of hands holding a tablet, with the text 'My Dashboard' and 'Welcome, Janet Brown!' overlaid. At the bottom, there are three widget-like boxes: 'Pending Business' with a large number '11', 'Quick Access', and 'Annuity Interest Rates'.