



MemberOne

Agency Relationship Toolset:
Manage & approve producer applications, licenses, and E&O

Customized Application for new users, with a custom designed approval process to follow through with.

Manage Licenses by State and expiration date for each user.

Manage Quoting Access for individual users by State and Line of Business with one click.

Control Carrier Access for producers by excluding individual carriers, or allowing a producer to enter their own credentials to quote using their own carrier contracts.

Manage Producer E&O information: record the carrier, limits, status and history of a policy. System generated emails delivered 30 days and 10 days prior to expiration remind the agent to upload their new policy.

Grant Specific Levels of Access available to a producer with customizable status codes.

Manage Membership Payments with secure storage of payment information, the ability to process payments electronically, and set up automatic recurring payments via EFT, credit card or check. Payment history is internally recorded, and emails are automatically generated.