

MISLogin.ca

Profile Management Guide

my insurance
shopper

Starting Point: Login at www.mislogin.ca

Use your Brokerage ID & Admin Password to access your **MISLogin Profile.**

Brokerage ID Number:

Admin Password:

LOGIN

1 Account Information

2 Brokerage Information

3 Insurance Types/Carriers

4 Brokerage Profile Page

WELCOME TO THE

My Insurance Shopper Broker Profile Management Centre

What's in the new **MISlogin.ca**?

- **Configure My Marketing Assist:** Don't turn away clients, use this feature to attract new business.
- **Configure My WebRater:** Now you can view your Insurance Shopper leads by setting up an Ezviewer User and that user can login to view your leads.
- **Languages Spoken:** Help communicate to your customers! You can now specify what languages are spoken at your offices in the Brokerage Information section.
- **Brokerage Profile:** Stand out in the crowd! With the profile management section, you can now add your own section – giving you additional flexibility to highlight your brokerage's strength.

Don't have your access details?

Email customersupport@ibri.ca

iBRI Independent
Broker
Resources Inc.

MISLogin.ca

my insurance
shopper

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1

Account Information

Password Management

Manage your brokerage Profile using your password.

Passwords must be between 6 to 10 characters

Enter password:

.....

Re-enter password:

.....

New Leads Email Notification

MIS LEADS are sent by email.

To receive new leads

DO NOT LEAVE
THESE BLANK!

Enter the email address you wish to have new leads emailed to:

kwarren@ibri.ca

Select the lead preference you wish to have emailed to you:

- ALL(including partial leads)
- Complete lead only

Enter "consumer email notification" "from" address:

donotreply@MISLogin.ca

We recommend selecting *ALL (including partial leads)* to maximize your options .

SAVE

for changes to take effect immediately

2

Brokerage Information

Publishing your brokerage information allows NEW BUSINESS to find you on MyInsuranceShopper.ca

- Ensure all fields are accurate and up to date.
- Your ID and Company Name are auto-populated, for changes contact customer-support@ibri.ca
- Select languages your brokerage represents to allow new businesss to find you in their language of choice

Brokerage ID: 6001
Company Name: A-Z Insurance Brokers

Select	
English	remove
French	remove
Spanish	remove
Mandarin	remove

3


Insurance Types/Carriers

Types of Insurance

DISTINGUISH YOUR BROKERAGE to NEW BUSINESS through

No Product = No Sales

Type of Insurance
Select the insurance type(s) that your brokerage offers or specializes in:

* Select: 


- Select --
- Select --
- Automobile
- Boat
- Business

Personal Lines Insurance Carriers

Maximize your quoting opportunities

SELECT the companies you have insurance agency/broker contracts with for all your personal lines products.

Personal Lines Insurance Carriers
The Selected companies will be used to provide personal lines auto and p your office on the My Insurance Shopper website. Please do not forget to standard markets you may represent.

* Select: 

- Select --
- Select --
- Aviva
- Aviva Trader
- Exelis General Insurance Company

**Note: If you do website will not in direct let a c

All Insurance Carriers

SELECT the companies you have insurance agency/broker contracts with for both personal and commercial lines.

4

Brokerage Profile Page

Step 1: Basic Information

A. UPLOAD YOUR COMPANY LOGO

LOGO Standards....

Size 2MB, Format JPEG, PNG, or GIF

Image dimensions Width >235 pixels, Height > 50 pixels

B. COMPLETE YOUR COMPETITIVE ADVANTAGE

Stand out let NEW BUSINESS know why they should choose you!

Enter text for Competitive advantage section:

USE THIS SECTION TO ANSWER...

WHAT MAKES YOUR BROKERAGE SHINE?

Path: p

Maximum 700 characters

C. ADD YOUR SOCIAL LINKS



<http://www.Facebook.com>

(format: <http://www.Facebook.com>)



<https://twitter.com>

(format: <https://twitter.com/>)



<https://www.linkedin.com>

(format: <https://www.linkedin.com/>)



<https://www.rss.com>

(format: <https://www.rss.com/>)

Step 2: Banner Configuration

Submit your logo and images to customersupport@ibri.ca and IBRI will configure your banner!



Without Configuration



With Configuration



Step 3: Video and Image Gallery

NEW BUSINESS wants a personal connection with you...
Use IMAGES and YOUTUBE videos to become more appealing.



Have a broker contact you

Name

Image

Choose File No file chosen

UPLOAD

Image Standard:
 File Format: JPEG, PNG or GIF
 Minimum width x height: 180 px X 150 px

Coverages offered

Automobile

Business

Boat

Commercial

Commercial

Services

Travel

Video URL

UPLOAD

VIDEO Standard
 YOUTUBE Video URL Format:
 http://www.youtube.com/watch?zuVsHt3rBNC

Step 4: Value Proposition

Differentiate your Brokerage

Utilize the **About Us, Our team, Our Mission, Community events & Images** to showcase your brokerage.

ABOUT US | **OUR TEAM** | OUR MISSION | COMMUNITY EVENTS

Tom Smith

Tom Led leads our Client Relations, Practice Groups and Sales/Marketing Team. He also works with clients to ensure they are connected with the best expertise and capabilities at Test Insurance to help grow and retain their business relationships. Tom works with retail clients of all sizes and structures. Prior to Test Insurance, Tom was the regional leader of AUC practices for a national retail broker.

416.340.2848 | tom.smith@testinsurance.ca

Sarah Mccoy

Sarah Rubie is on the Client Relations, Practice Groups and Sales/Marketing Team and focuses predominantly on building out our industry practices to better align with our clients. Sarah also works with clients to ensure they have access to all of the organizations capabilities. Prior to Test Insurance, Sarah worked in retail brokerage.

416.369.9796 | sarah.mccoy@testinsurance.ca

Adam Cadler

Adam Mahis joined the Sales and Marketing Team in 2012 with an emphasis on supporting our Group Benefits product practices and segments. To enhance alignment with our clients, Adam also spends time with regional and national retailers to ensure they have full access to our capabilities. Prior to Test Insurance, Adam worked directly across the health care industry gaining experience in sales, marketing, and operations.

416.340.2871 | adam.cadler@testinsurance.ca

Text Standard per tab
 Maximun 700 Characters

ABOUT US | OUR TEAM | OUR MISSION | **COMMUNITY EVENTS**

A-Z Insurance Brokers, reaching our community one event at a time.

Individually, we each believe in helping our local community (that's just our way), but annually we do it BIG! Inviting all of our clients ("Our extended family"), to join us for fantastic food and great fun. **WE HAVE A BLAST!**

Sharing together, Caring together, Loving together, Protecting it **TOGETHER.**

Reach out and join our family, **TODAY!**

Image Standards
 Format JPEG, PNG, or GIF
 Dimensions Width > 180 pixels,
 Height > 150 pixels
 4 image maximum (Value Proposition)

Configure My WebRater (Options to view your MIS Leads)

OPTION 1: CONFIGURING YOUR ONLINE MIS WEBRATER

A.

- Go to Configure My WebRater
- Select ezViewer Users
- Setup at least one user credentials

B.

- Go to ezViewer Login
- Use your ezViewer credentials to login and view your Auto/Property lead

The screenshot shows the MISLogin.ca website interface. At the top, there are navigation links: "Configure My WebRater" (circled in red), "Mobile App", "Config My Marketing Assist", and "Marketing Assist". Below the navigation, there are two main sections: "A." and "B.". Section A shows a "User Credentials" form with a table for adding users. Section B shows an "ezViewer Login" form with fields for Username and Password.

A. Configure My WebRater

my insurance shopper

ezViewer Users

Add a User

Name	User ID	Password	
Jane Smith	Sample600	Password6000	X

Save Changes

B. ezViewer Login

Log In to Applied WebRater

Username

Password

Log In

OPTION 2: CONFIGURE MIS LEADS IN YOUR APPLIED RATING SERVICES (EZLEADS)

- Locate the Desktop where your EzLeads portal was installed and open.
- Go to Preferences (if listed delete any MIS or IBRI account)
- Select Add Web Account
- Setup New MIS Account using the following....

The screenshot shows the Preferences dialog box for EzLeads. It has several sections: Language (English/French), Communicator Type (Standard ezLeads, ezLeads Service NOT INSTALLED), Connection (Local Area Network, Dial-Up Information), and Account Settings. The Account Settings section is expanded, showing fields for Account, URL, Logon, Password, Product, and Site.

Preferences

Language: English French

Communicator Type: Standard ezLeads ezLeads Service NOT INSTALLED

Connection: Local Area Network Dial-Up Information

Select Connection:

Logon Name:

Password:

Account Settings

Add Web Account Delete Web Account

Account: MIS Test Account

URL: https://www10.compu-quote.com/EzLeadsWebService/EzLead:

Logon: 6000 Password: *****

Product: Leads Web Service

Site: MyInsuranceShopper

OK Cancel

Account: MIS Leads

Longon: use your MIS Login Brokerage ID

Password: use your MIS password

Product: Leads Web Service

URL: <https://www10.compu-quote.com/EzLeadsWebService/EzLeadsExportService.aspx>.

Config My Marketing Assist

MISLogin.ca
my insurance
shopper

Configure My WebRater | Mobile App | **Config My Marketing Assist** | Marketing Assist

NEW BUSINESS can now find you for their Specialty Products with
Config My Marketing Assit

- Select Add a New Product
- Choose applicable categories
- Submit all that are applicable

Add a New Product

Category

CANCEL DELETE

Please select a category and products you offer:

Select

AGRICULTURE/FARMING/ANIMALS
AUTOMOBILE SPECIALTIES

Please select a category and products you offer:

CONTRACTORS

Select All

<input checked="" type="checkbox"/> 100% U.S. Work	<input checked="" type="checkbox"/> Asbestos, Lead Silica & Mould	<input checked="" type="checkbox"/> Blasting/Explosive
<input checked="" type="checkbox"/> Demolition	<input checked="" type="checkbox"/> Industrial Electrician	<input checked="" type="checkbox"/> Landscapers
<input checked="" type="checkbox"/> Legal Expense	<input checked="" type="checkbox"/> Log Home Builders	<input checked="" type="checkbox"/> Logging and Bush Work
<input checked="" type="checkbox"/> Pollution	<input checked="" type="checkbox"/> Remediation	<input checked="" type="checkbox"/> Road Builders
<input checked="" type="checkbox"/> Roofing	<input checked="" type="checkbox"/> Roofing Hot Tar	<input checked="" type="checkbox"/> Spray Painting
<input checked="" type="checkbox"/> Welding Off-Premises		

CANCEL SUBMIT

Find Your Specialty Market

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Configure My WebRater | Mobile App | Config My Marketing Assist | **Marketing Assist**

Need help finding a Specialty Market Provider?

SELECT look up method or Select a Category to find your provider and wrap up the quote.

Select a category

Select

[Alphabetical Product Listing](#)

[Company Product Listing](#)

[All New Products within last 60 days](#)

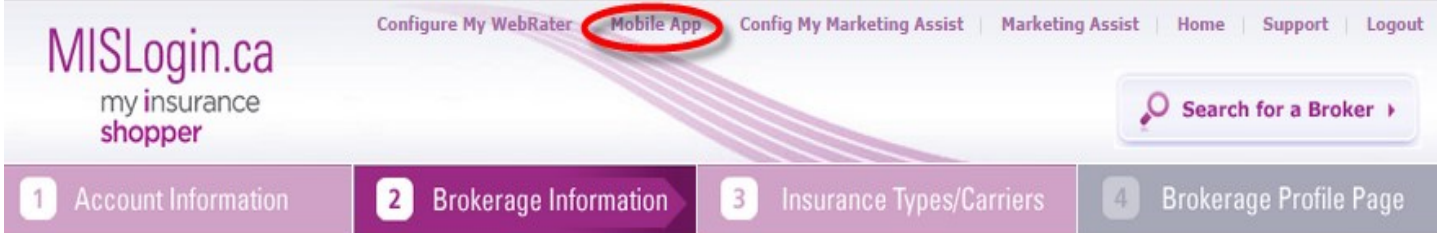
[Clicks Reports](#)

[Categories and Products Management](#)

Mobile App: iCompanion (if you are a subscriber)

iCompanion subscribers... set up your email notification here!

Want iCompanion, contact customersupport@ibri.ca



1. You can add one or more emails

From this screen, you can configure the email address that the mobile app sends message to.

Broker's email address(es) to receive User Registration emails (comma-separate list):

Broker's email address(es) to receive Claims and Client Contact emails (comma-separate list):

Select your timezone from the dropdown list

SUBMIT

2. Specify how you want the email notification to arrive in your email inbox

[Add new rule](#)

Delete	Edit	Carriers	Time Frame
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Rules

Select the carrier for which this rule applies:

carriers:

Select the time frame during which the rule should apply:

Comma-separated list of email addresses that should be contacted when this rule applies: