

THE BROKER PORTAL USER GUIDE

This guide will help you navigate the new features added to the broker portal.

Brokers.mwadmin.com will take you to this website where you can either register the portal for the first time or sign in as an existing user.

Broker
PORTAL by MWG

MWG Portal Log in

User Name

Password

Login Create an User ID

Forgot Password?

Can't Remember?

*Click forgot password under the green login button if you don't remember your username or password.

If you get an error, try another email address you may have used to register the portal, as it must match what was used to register. Once it does, this will send an email to that address that will grant you access and walk you through resetting your password.

If registering for the first time, the second page will request your DOB and last four SSN digits that **MUST MATCH EXACTLY** to what is entered in our system.

Reset My Password

You can reset the password for your MWG Web Portal account by providing some information. Shortly after clicking "Reset Password" you will receive an email at the email address associated with your user Id. This email will contain a link allowing you to generate a new temporary password.

Enter Your **User Name** or **Email Address**

Send Reset Password Link

If you receive and error message you will need to contact:
portalhelp@morganwhite.com

Associate an Agent

To complete your enrollment to the MWG Broker Portal we need to associate your MWG Agent identity. Please fill out the following form and we will retrieve this information.

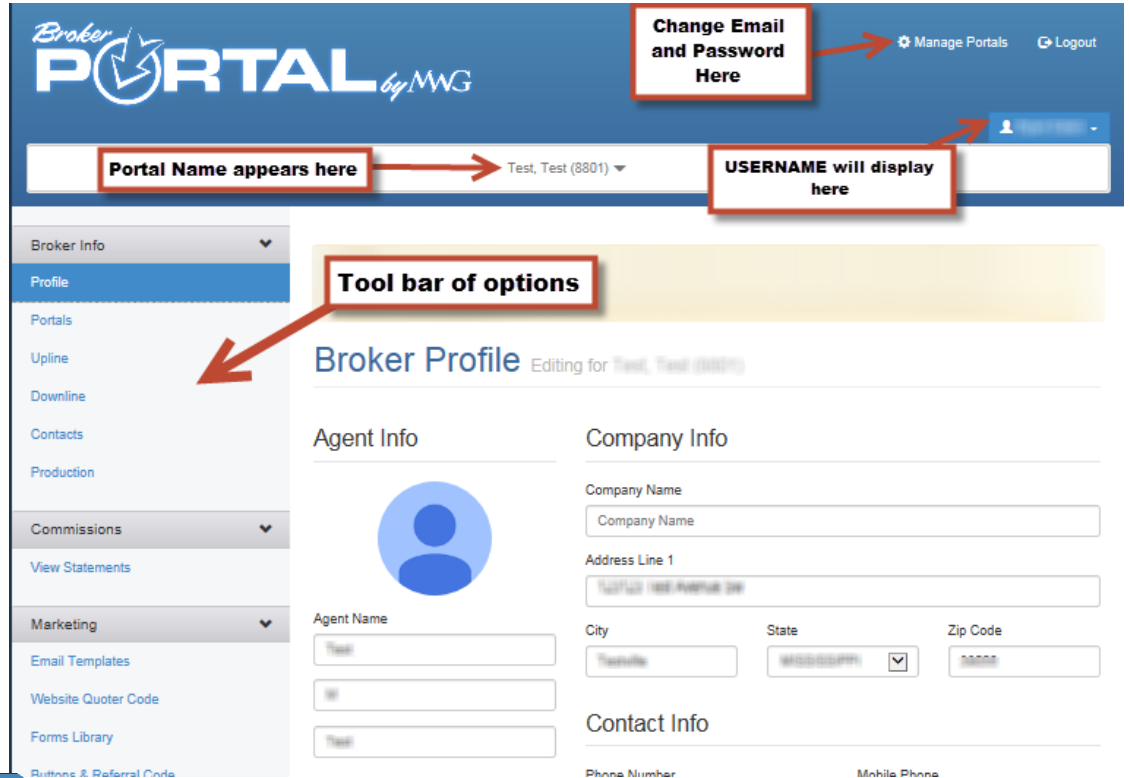
Last Name
MUST MATCH BROKER data in our system

Last Four Digits of Social Security Number
MUST MATCH BROKER data in our system

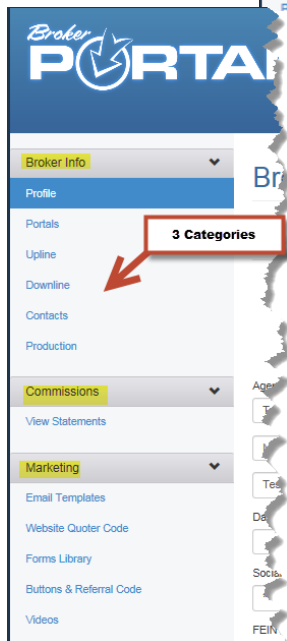
BirthDate
1/1/0001
MUST MATCH broker data exact in our system.

Search **Need Assisstance?**

Once inside the portal, there are three things to make note of here. First, your username will be displayed in the far right upper corner, secondly Manage Profile where you go to change your password or email tied to this portal.



Lastly, the tool bar of options is now stacked on the left hand side instead of across the top under the blue logo.



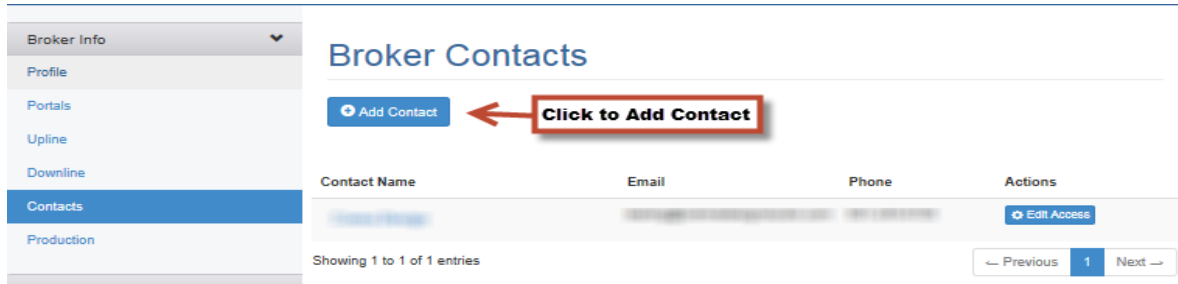
The Broker Portal is broken down into three categories: Broker Information, Commissions, and Marketing.

If you click the Broker Profile tab there are two things you can accomplish: 1) edit or complete broker data or 2) enter or edit payment methods for commission deposit.

The Broker Portal lists any Portals, Upline, and Downline that are tied to the broker (if applicable).

Portal	Agent	Entry Date
Test, Test (2017)		
11245-20000	Test, Test (2017)	8/11/2016
Teasing, Only (2017)		
11245-20001	Teasing, Only (2017)	1/17/2016

With the Contacts tab, brokers are able to add a person to their account and assign them a role without having to go through the registration process again. The two roles are Broker Administrator (ability to view, change, or update information) and Commissions only (access to commission statement history only)



By clicking on Add Contact, you are able to add a contact to the account. After providing the requested information, the contact's data will be saved to the account.

New Contact

Broker: [dropdown]

Fill out the required fields and click "Save"

First Name: [input field]

Last Name: [input field]

Phone Number: [input field]

Email Address: [input field]

Close Save

Next, you would need to assign the contact person a role inside the portal by clicking the blue "edit" tab on the right hand side on the Broker Contacts page.

****Please note that this is a two part process so just providing the contact's information will not give them access to information. You will have to assign the contact person to a role and send the invitation. In turn, they would receive an email notifying them they are now a contact with access and they will then be prompted to create their own username and password.**

Contact Access

Assign the role to the contact here

Role of this User: [dropdown menu with 'None' selected]

- Broker Administrator** Ability to view commissions, change or update EFT Information and other broker data
- Group Administrator** Contact is granted the ability to request access to any of your groups' web portal as well as generate marketing material on your behalf.
- Commissions Only** Contact is only granted access to your commission statements
- Marketing Only** Contact is only granted access to your marketing materials

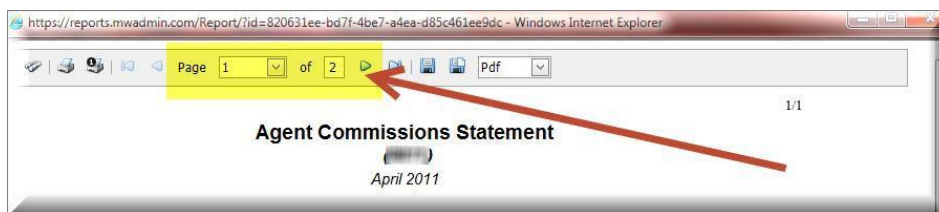
Send Invitation

Upon clicking the create button, a notification email will be sent to the email address used above detailing instructions on how to change their password and log in to the MWG Broker Portal.

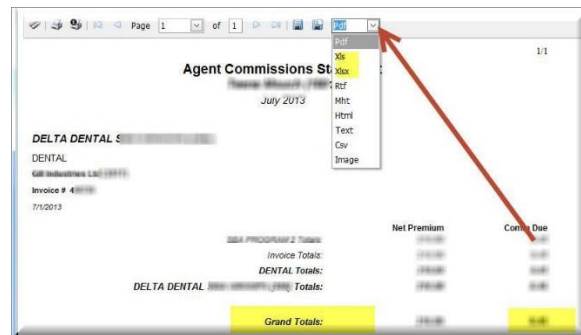
The second category on the portal that is useful to the broker on a regular basis is the commissions tab. After you have contracted with MWG and have had a full month of commission generated, you can go to this tab at any time and view your history of commission statements.

**MWG closes out a full month, posts the commissions for that month to your direct deposit account so commissions pay out the following month. So for example: June's commissions are posted first week of July, and July's commissions are posted the first part of August, and so on.

Two things to note: The amount deposited will show up on the commission statement as a GRAND TOTAL. This grand total will be on the LAST PAGE of the statement. The statement will show you how many pages it contains at the top in the toolbar once it is opened. You can print off the pdf to see how many pages it has or you can "arrow over" to the last page to see the grand total amount matching the deposited amount on the last page. Here is an example:



The second thing to note is that you can export these statements in many different formats. PDF is the default standard, but you can save it as an image, export it in Excel, whichever format you need. Here is where you go to change the format once the PDF is opened.



The latest feature on the Broker Portal is the newly added Marketing Tab. You will now be able to automatically generate an email to send out to clients with your portal code for commission tracking built in right from your portal.

First, confirm that your information is correct or edit it as you'd like it displayed for this singular purpose. Select your portal (if more than one) and enter the email address of the recipient (or send to yourself as a test). Next, select the template of the email you would like to send out, whether it be vision, dental, or a combo of both. It's totally up to you. **We have also included the Preview Sample for you to utilize prior to the send function.*

Broker
PORTAL by MWG

Manage Portals Logout

Portal Name appears here

Agent information will appear here

Agent information: [Profile Picture], [Name], Edit Marketing Agent, Location, Social Media (www.facebook.com/, www.linkedin.com/)

Select Portal [Dropdown] Email Recipient [Text Field]

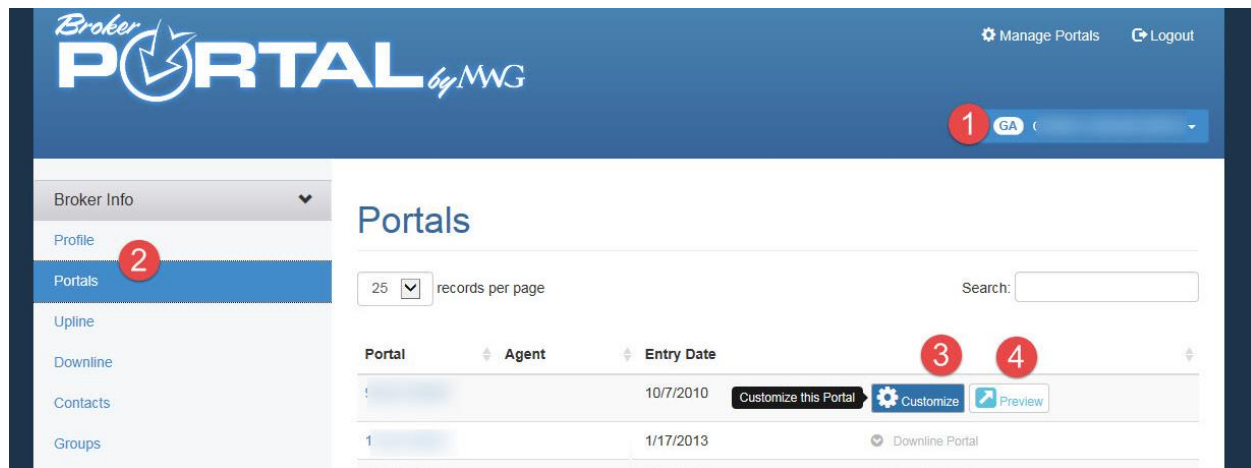
Select your portal and the email you would like the message to be sent.

Click Send on Your Preferred Template


An email template pertaining to vision, dental, or both

- Vision**
Being a visionary can be difficult. Choosing a vision plan doesn't have to be. We make it easy for you to take care of your eyesight with an array of vision plans.
[Preview Sample in Browser] [Send]
- Dental**
We offer dental insurance you can sink your teeth into. With our affordable dental insurance plans, we're your one stop shop.
[Preview Sample in Browser] [Send]
- Dental and Vision**
Quality dental and vision plans at a price you can afford.
[Preview Sample in Browser] [Send]

Our new Dental & Vision and Vision only platforms will be blank for all agents by default. You can customize these 2 sales platforms with your company name, logo, agent name, phone number and email. To do this, choose the portal tab on the left and you will see an icon to where you can personalize the information. Click that icon and fill out the fields you wish to populate. Put a checkmark next to the box you want to display on the web and click save. You can then preview your site and make changes if necessary. You do not have to choose to display all fields.



Portal Profile Information
Only checked items will display on your Sales Portal.

 [Upload Image](#)

Company Name

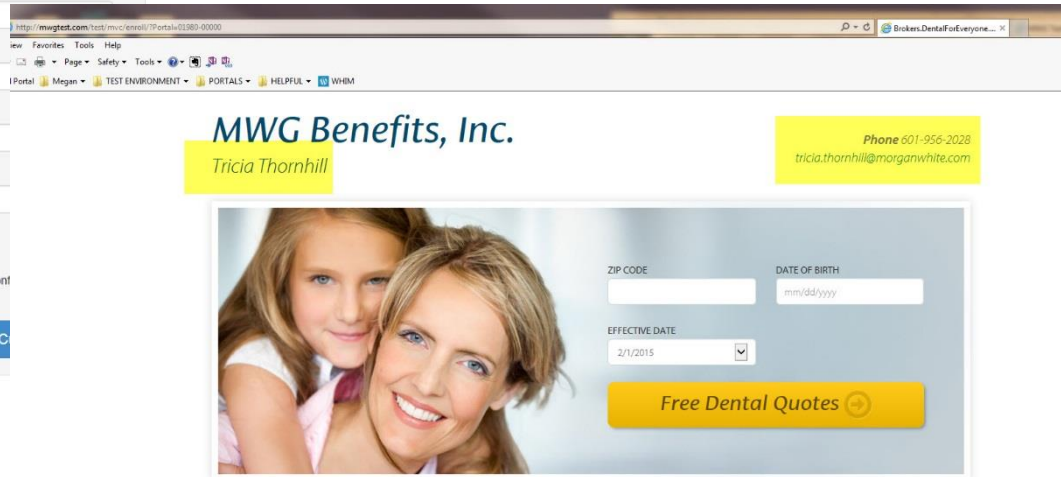
Full Name

Email Address

Phone Number

* If you would like to be **Blind Carbon Copied** on Individual Dental and Vision enrollment contact check the box.

[Save Portal C](#)



Dental and Vision Insurance

Next, the website quoter code tab allows you to be in control. You have the option to include only dental or vision on your site by selecting the desired item. It will then generate a code that you can include on your site.



Forms Library is a page that allows you to select the carrier of your choice and pull up any document on a product you may need more information on. This is a great way to get the plan specifics in front of you, fast.



With DFE images and links, you can tailor your site by changing the colors and banner images that direct traffic directly to your personal portal for tracking commissions/sales. Simply choose the graphic you want and utilize the code that is auto generated beside the image for your personal portal.

Broker

[Manage Portals](#)
[Logout](#)

PORTAL by MWG

User Name

Broker Info ▾

Profile

Portals

Upline

Downline

Contacts

Production

Commissions ▾

View Statements

Marketing ▾

Email Templates

Website Quoter Code

Forms Library

Buttons & Referral Code

Videos

Select Portal

12345-00000
▾

Image Links for Portal 12345-00000

Get Free Dental & Vision Quotes!
➔

DFE Quote Button Blue
Dental for Everyone Quote Button in Blue

http://www.dentalforeveryone.com/default.aspx?id=12345-00000

```

<a href="http://www.dentalforeveryone.com/default.aspx?id=12345-00000"></a>
                    
```

Get Free Dental & Vision Quotes!
➔

DFE Quote Button Yellow
Dental for Everyone Quote Button in Yellow

http://www.dentalforeveryone.com/default.aspx?id=12345-00000

```

<a href="http://www.dentalforeveryone.com/default.aspx?id=12345-00000"></a>
                    
```

Dental & Vision Plans

Click here

to view your options!

DFE Quote Banner
Dental for Everyone Quote Banner

http://www.dentalforeveryone.com/default.aspx?id=12345-00000

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<a href="http://www.dentalforeveryone.com/default.aspx?id=12345-00000"></a>
                    
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Dental&Vision

insurance quotes

Click here

➔

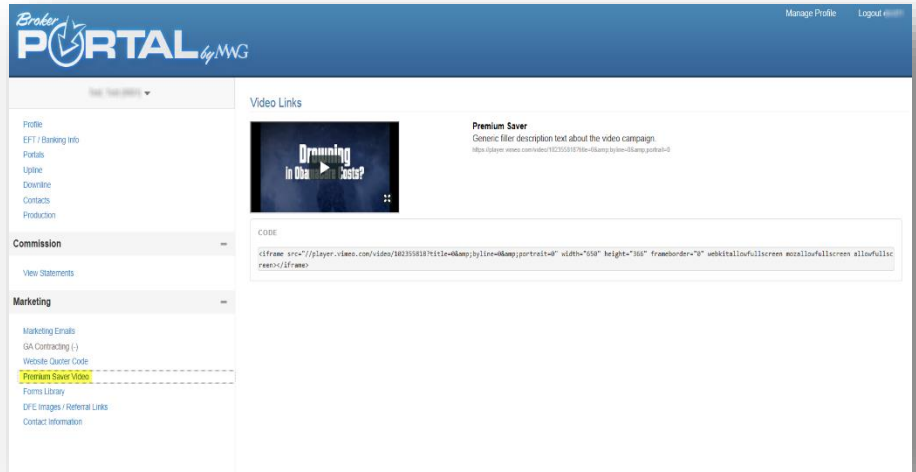
DFE Quote Banner - Wide
Dental for Everyone Quote Banner Wide Format

http://www.dentalforeveryone.com/default.aspx?id=12345-00000

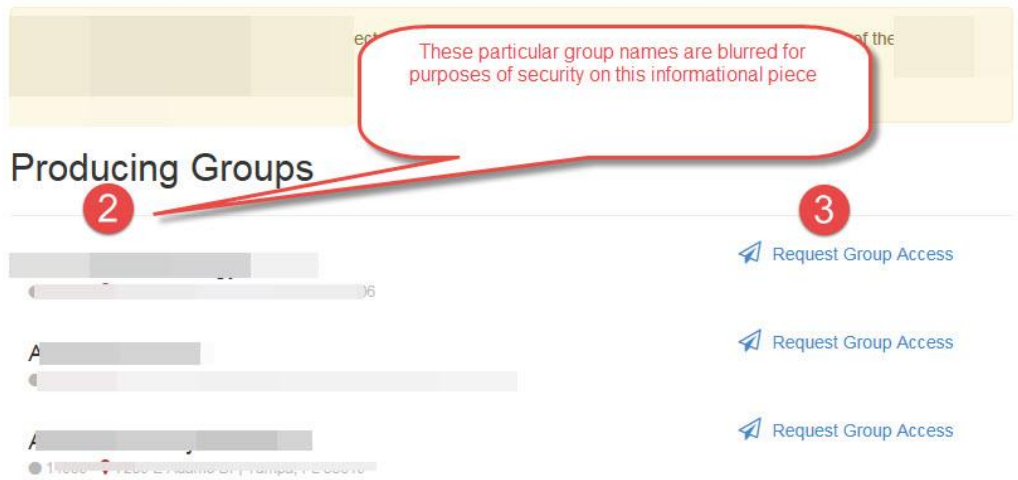
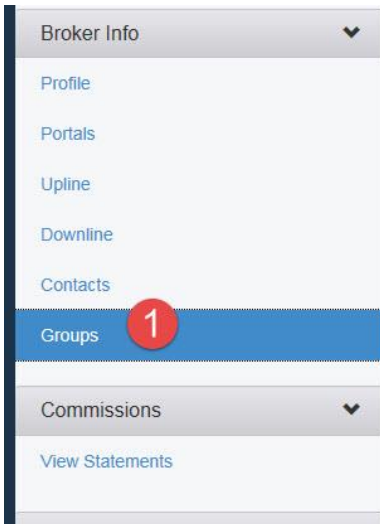
```

<a href="http://www.dentalforeveryone.com/default.aspx?id=12345-00000"></a>
                    
```

Sell our Premium Saver plans? You can include a short video on your sales site explaining to potential clients more about the product with the code to the PS video we now provide.



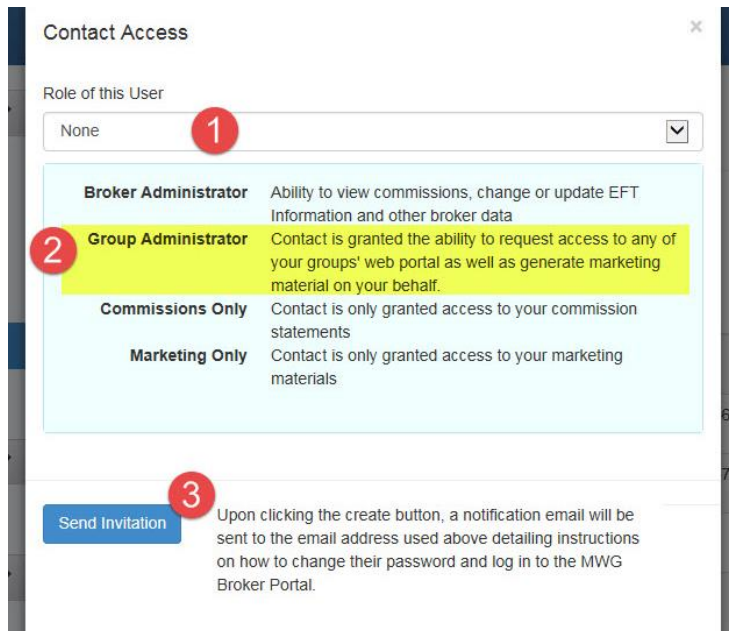
For agents who work with groups we have a feature now in the broker portal where you can click on the word GROUPS down the left hand column and if you have production under a group they will show up in a list on this page. You can “request access” to that group by clicking the wording next to their name. It will change to “Pending” until it is either accepted or declined by the primary billing group contact we have on file.



If declined, you will get an email response as well as it will state declined now next to the group's name on this page. If the request for you to be added to enter the group portal is accepted, again, you will get an email notice and the wording of pending will change to an icon you can click to enter their portal.



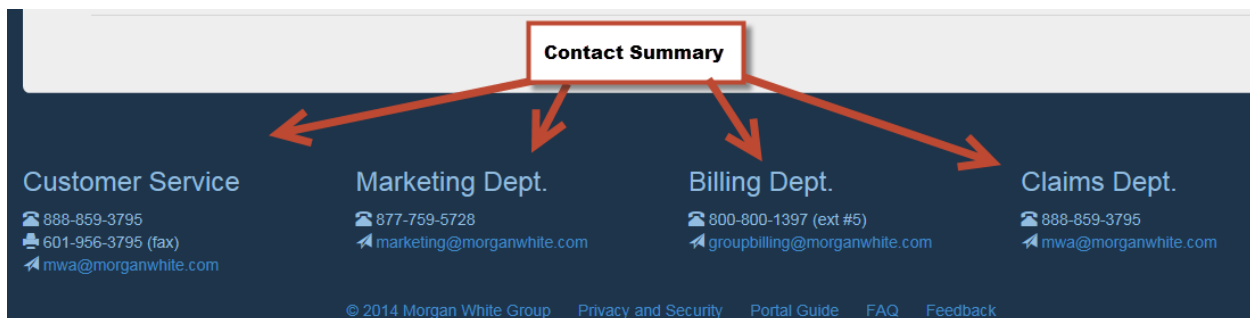
****As a broker, you can create a contact (or edit an existing one you created) in your portal and assign the Group Administrator Role to them to see only your groups for them to access and make edits on your behalf and your marketing section where they can access your email templates on your behalf as well and view no other data.**



You can use the

FAQ or User guides at the bottom of the website once you are transferred into their portal to learn how to navigate the portal.

We have also included contact information at the bottom of all tabs for your convenience. This serves as a quick reference if you are needing to get in touch with one of the desired departments.



**Always remember that we have also provided this Broker Portal Guide and an FAQ's document at the bottom of our site (brokers.mwadmin.com) to help you navigate around the portal.*