



## MyProtective.com Sub-user maintenance process

January 2021

## Sub-user creation process

# Step 1: Primary user logs into MyProtective.com and navigates 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 dropdown menu is open, displaying a welcome message and a list of navigation options. The 'Manage Sub-Users' option is highlighted with a yellow background. Below the dropdown, the main dashboard area features a 'My Dashboard' header and a welcome message. At the bottom, there are three main sections: 'Pending Business' with a count of 11, 'Existing Business', and 'Quick Access'.

Search

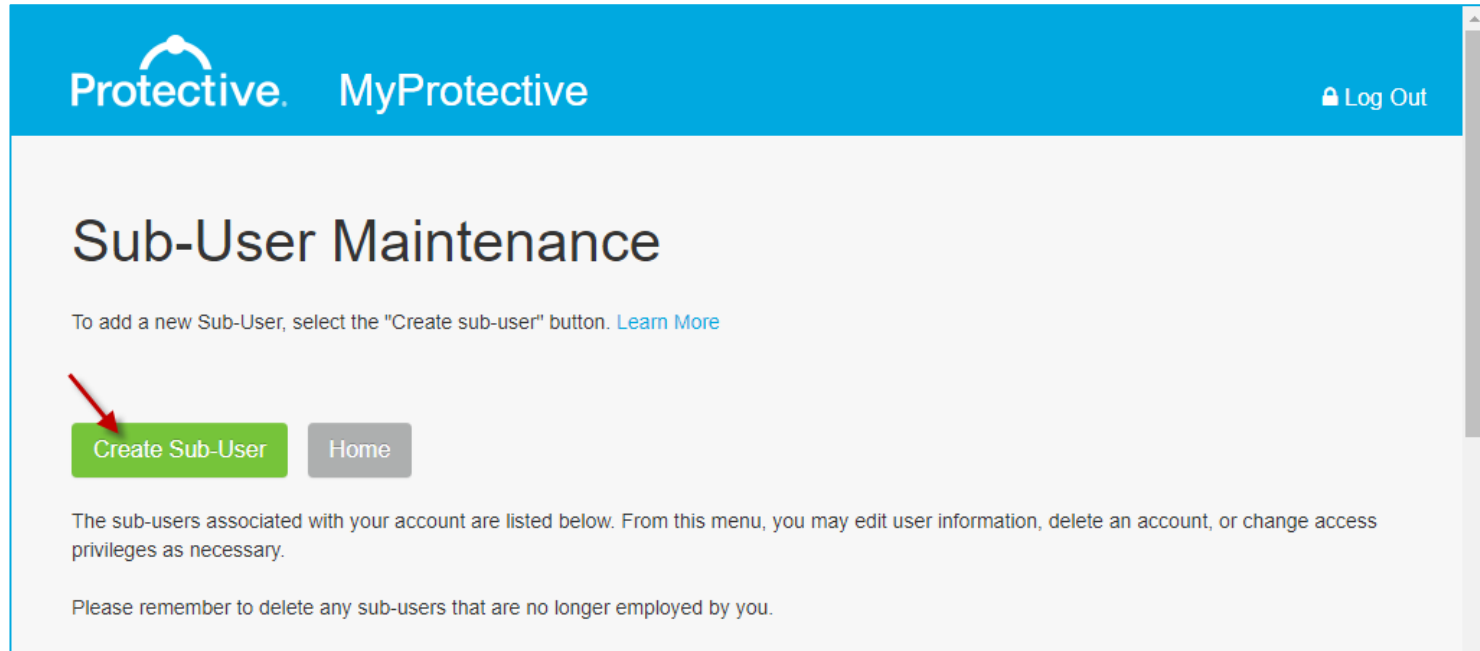
Welcome, Life Agent Services Guest!

- 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)
- Manage Sub-Users**

**My Dashboard**  
Welcome, Life Agent Services Guest!

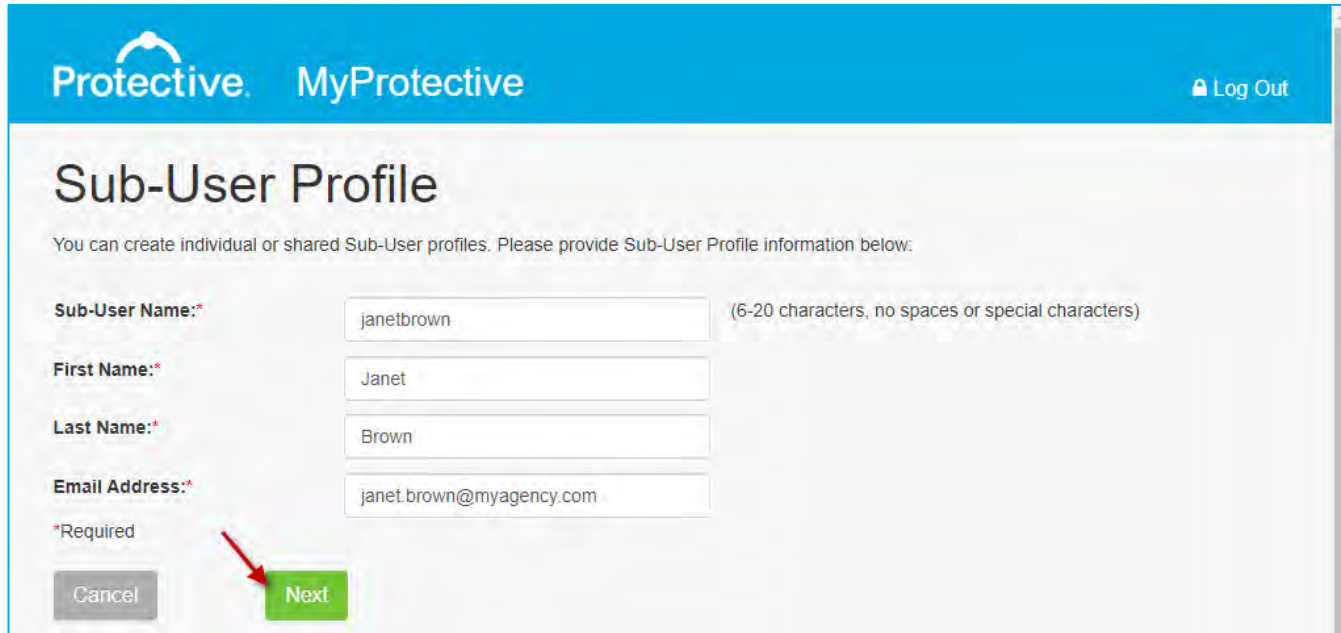
**Pending Business** 11 **Existing Business** **Quick Access**

## Step 2: Primary user clicks the “Create Sub-User” button.



The screenshot shows the 'Sub-User Maintenance' page in the Protective MyProtective interface. The page has a blue header with the Protective logo and 'MyProtective' text on the left, and a 'Log Out' button on the right. The main content area is white and features the title 'Sub-User Maintenance'. Below the title, there is a paragraph: 'To add a new Sub-User, select the "Create sub-user" button. [Learn More](#)'. A red arrow points to a green 'Create Sub-User' button, which is positioned next to a grey 'Home' button. Below the buttons, there is another paragraph: '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.' and a final paragraph: 'Please remember to delete any sub-users that are no longer employed by you.'

## Step 3: Primary user enters profile information for sub-user.

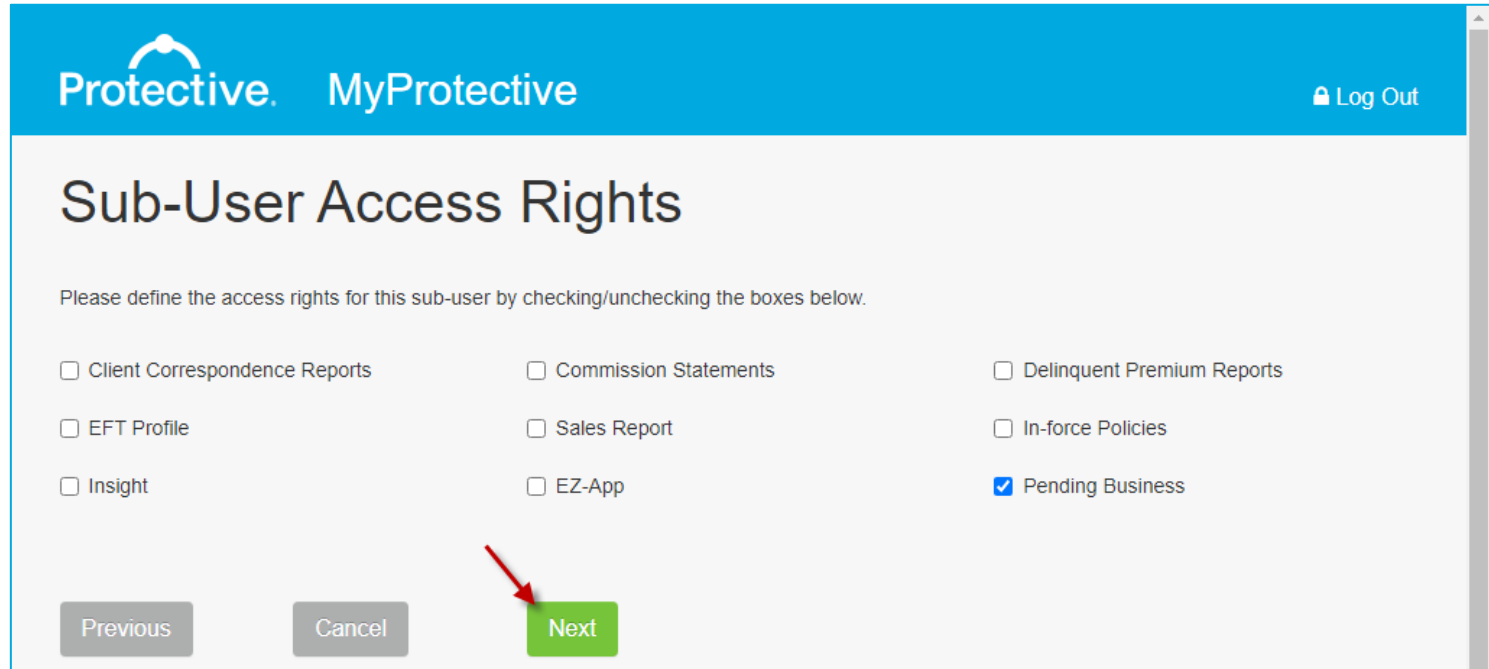


The screenshot shows a web interface for 'Protective MyProtective'. At the top right, there is a 'Log Out' button with a lock icon. The main heading is 'Sub-User Profile'. Below the heading, a message states: 'You can create individual or shared Sub-User profiles. Please provide Sub-User Profile information below:'. The form contains four input fields, each with an asterisk indicating it is required:

- Sub-User Name:** Input field contains 'janetbrown'. To the right of the field is the text '(6-20 characters, no spaces or special characters)'.
- First Name:** Input field contains 'Janet'.
- Last Name:** Input field contains 'Brown'.
- Email Address:** Input field contains 'janet.brown@myagency.com'.

Below the input fields, there is a note '\*Required'. At the bottom left, there is a grey 'Cancel' button. At the bottom center, there is a green 'Next' button with a red arrow pointing to it from the left.

## Step 4: Primary user selects access rights.



**Protective. MyProtective** Log Out

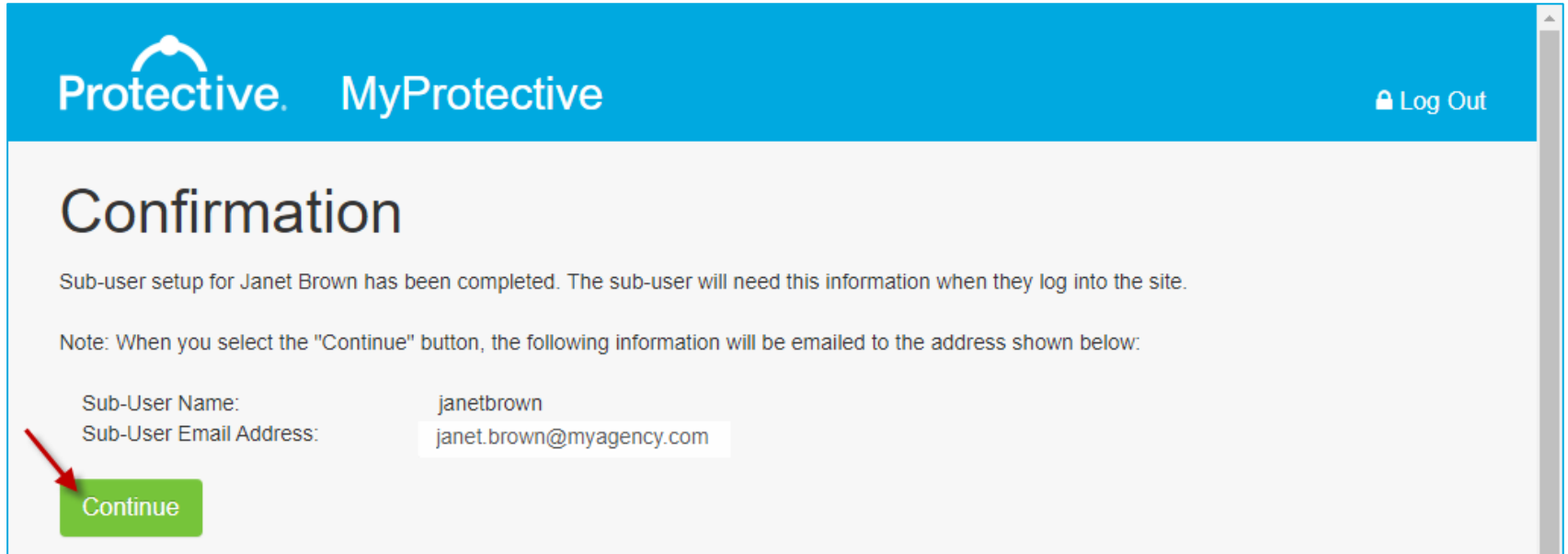
### Sub-User Access Rights

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 user confirms information and clicks “Continue” to email registration details to the sub-user for password setup.



The screenshot shows a web interface for 'Protective MyProtective'. The header is blue with the 'Protective' logo and 'MyProtective' text on the left, and a 'Log Out' button on the right. The main content area is white and titled 'Confirmation'. It contains a message: 'Sub-user setup for Janet Brown has been completed. The sub-user will need this information when they log into the site.' Below this is a note: 'Note: When you select the "Continue" button, the following information will be emailed to the address shown below:'. A table displays the sub-user details: 'Sub-User Name: janetbrown' and 'Sub-User Email Address: janet.brown@myagency.com'. A green 'Continue' button is at the bottom left, with a red arrow pointing to it.

Protective. MyProtective Log Out

## 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.

Protective. MyProtective Log Out

### 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.

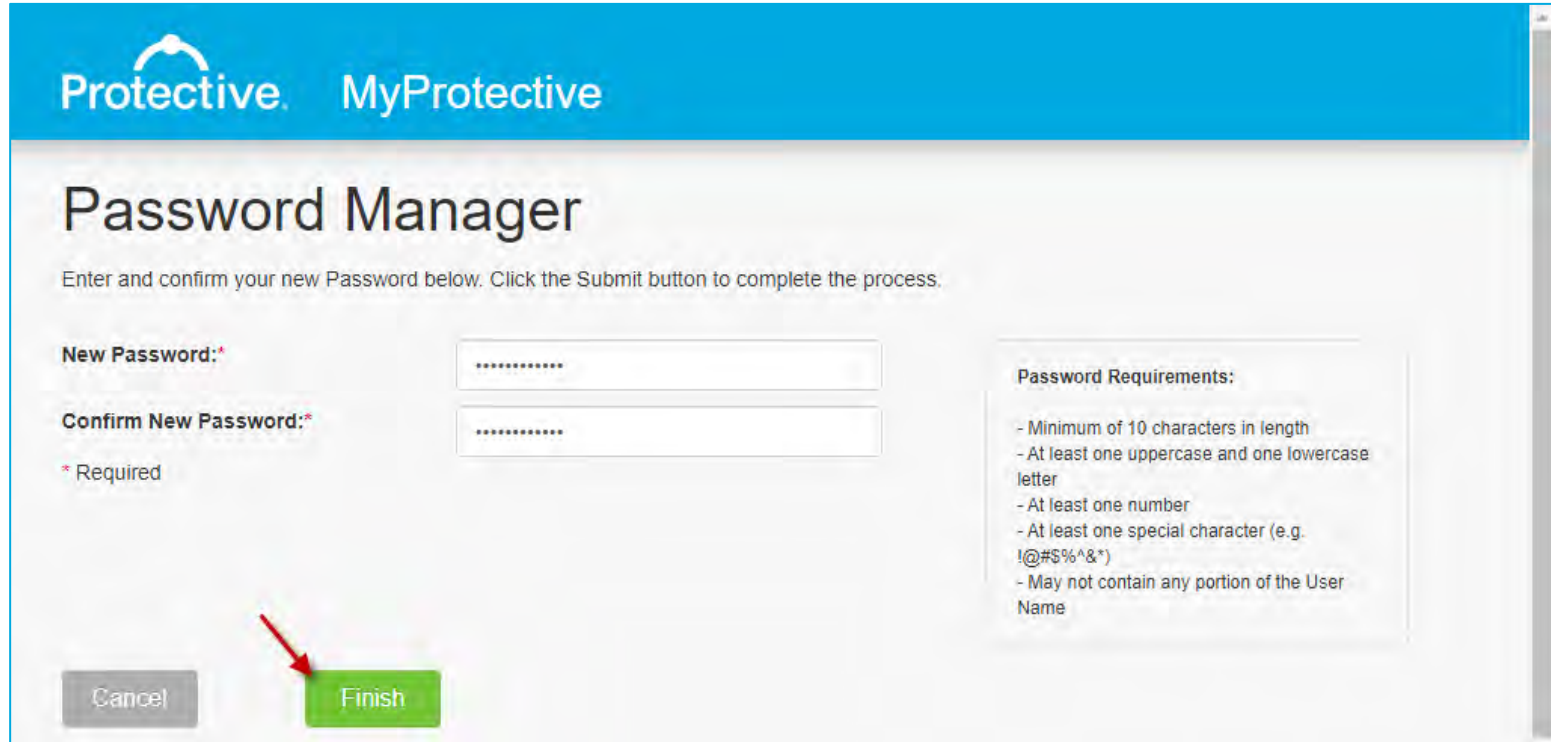
Protective. MyProtective

## 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 'Protective MyProtective Password Manager' interface. At the top, there is a blue header with the Protective logo and the text 'MyProtective'. Below the header, the main title 'Password Manager' is displayed. A sub-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.

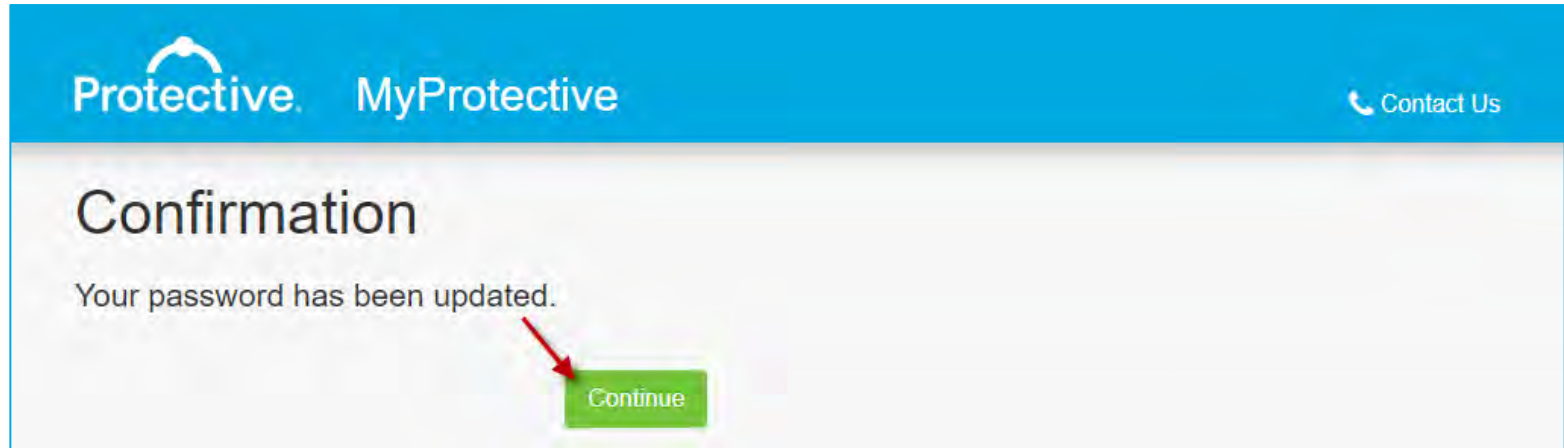
A note below the fields states: '\* Required'.

To the right of the input fields, a box titled 'Password Requirements:' lists the following criteria:

- 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.

Protective. MyProtective [Contact Us](#)

### 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.

**Protective.** MyProtective Log Out

### 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:**

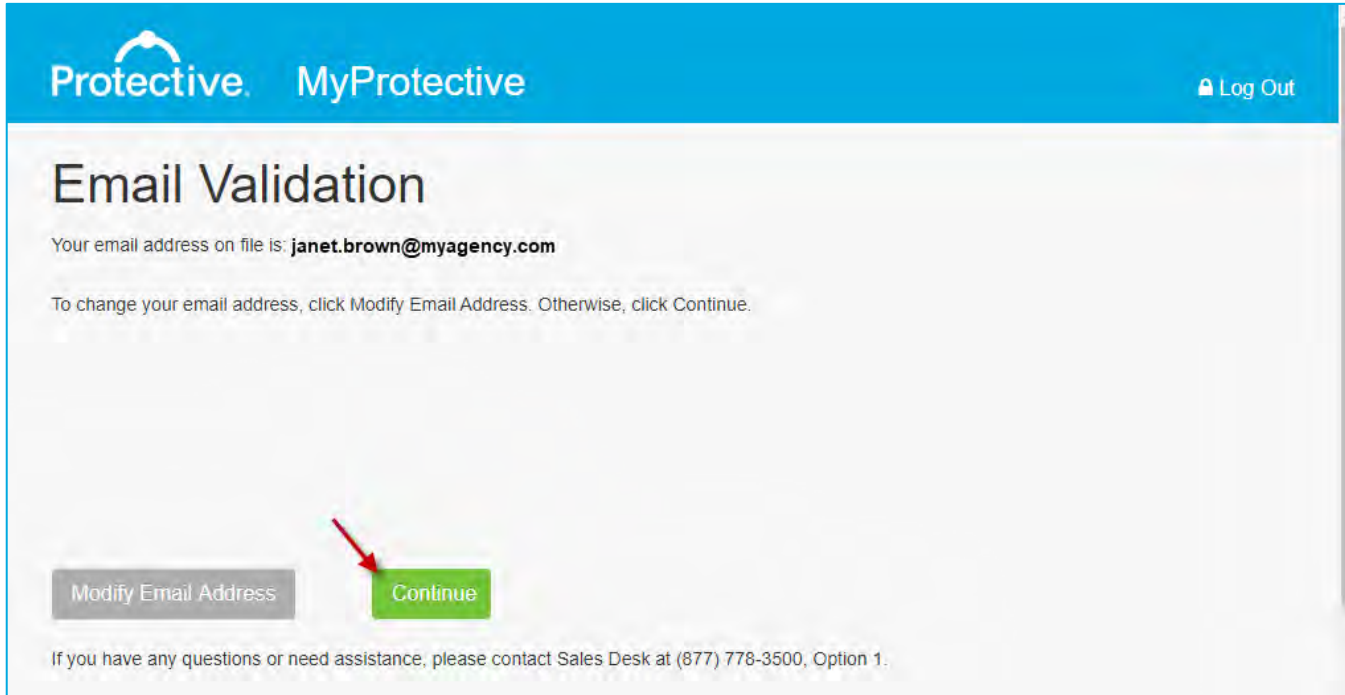
**Password Help Question: \***

**Password Help Answer: \***

**Confirm Answer: \***

[Learn more](#)

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



The screenshot shows the 'MyProtective' user interface. At the top, there is a blue header with the 'Protective.' logo and 'MyProtective' text on the left, and a 'Log Out' button with a lock icon on the right. The main content area is white and titled 'Email Validation'. Below the title, it states 'Your email address on file is: **janet.brown@myagency.com**'. A paragraph of instructions follows: 'To change your email address, click Modify Email Address. Otherwise, click Continue.' At the bottom of the content area, there are two buttons: a grey 'Modify Email Address' button and a green 'Continue' button. A red arrow points to the 'Continue' button. At the very bottom of the page, there is a line of text: '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 user 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 secondary navigation bar contains four categories: 'MY BUSINESS', 'PRODUCTS & SOLUTIONS', 'MARKETING RESOURCES & TOOLS', and 'WORKING WITH PROTECTIVE'. The main content area features a large banner with the text 'My Dashboard' and 'Welcome, Janet Brown with Santander Securities!' over a background image of hands holding a tablet. At the bottom, there are three widget-like sections: 'Pending Business' with a large blue box containing the number '11', 'Quick Access', and 'Annuity Interest Rates'.

## Sub-user password reset

# Step 1: Primary user logs into MyProtective.com and navigates 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 dropdown menu is open, displaying a welcome message and a list of maintenance options. The 'Manage Sub-Users' option is highlighted in yellow. Below the dropdown, the main dashboard area features a 'My Dashboard' header and a 'Welcome, Life Agent Services Guest!' message. At the bottom, there are three main sections: 'Pending Business' with a count of 11, 'Existing Business', and 'Quick Access'.

Search

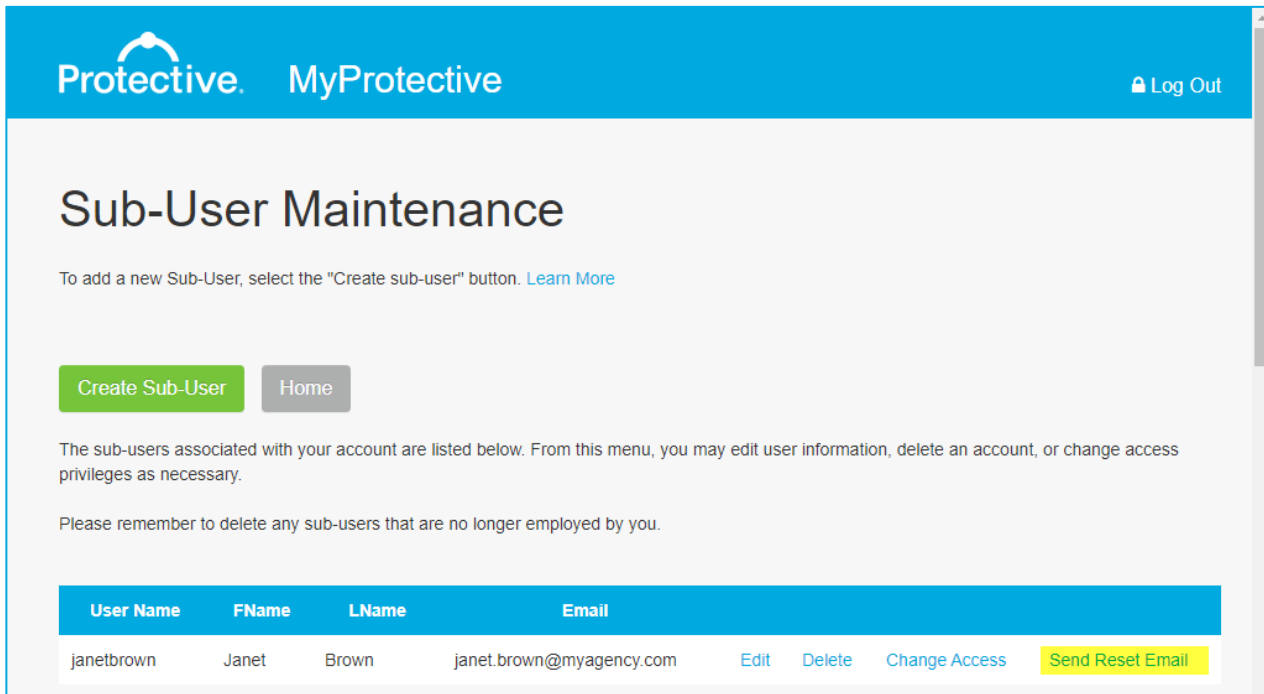
Welcome, Life Agent Services Guest!

- 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)
- Manage Sub-Users**

My Dashboard  
Welcome, Life Agent Services Guest!

Pending Business **11** Existing Business Quick Access

## Step 2: Primary user selects “Send Reset Email” for desired sub-user account.



The screenshot shows the 'MyProtective' web interface. At the top, there is a blue header with the 'Protective' logo and 'MyProtective' text, and a 'Log Out' button. The main content area is titled 'Sub-User Maintenance'. Below the title, there is a paragraph of instructions and a 'Learn More' link. Two buttons are visible: 'Create Sub-User' (green) and 'Home' (grey). Another paragraph explains the sub-user list and provides a reminder. At the bottom, a table lists sub-users with columns for 'User Name', 'FName', 'LName', and 'Email'. The first row shows 'janetbrown', 'Janet', 'Brown', and 'janet.brown@myagency.com'. To the right of the email are links for 'Edit', 'Delete', 'Change Access', and a highlighted 'Send Reset Email' button.

Protective. MyProtective Log Out

### Sub-User Maintenance

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

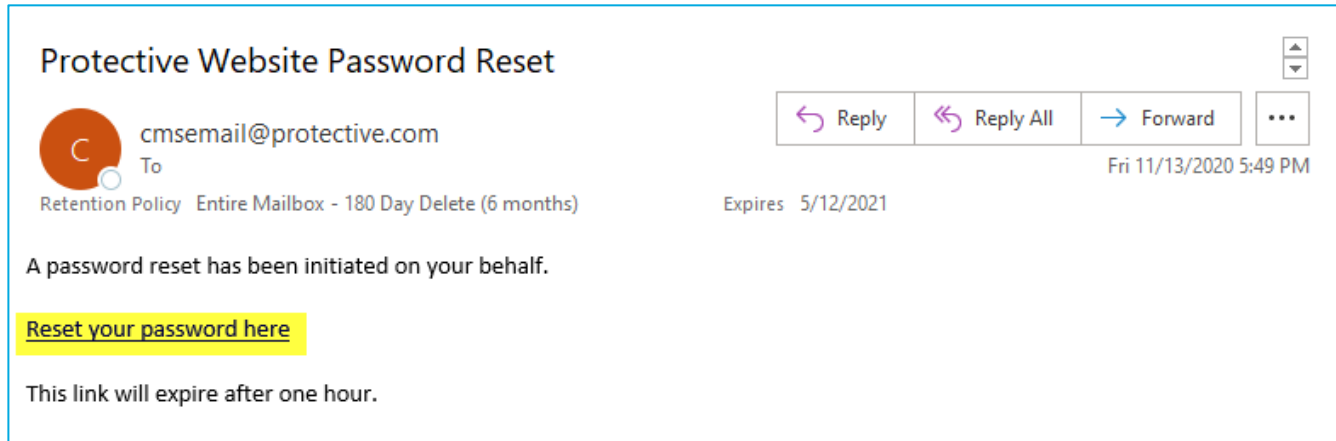
Create Sub-User Home

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.

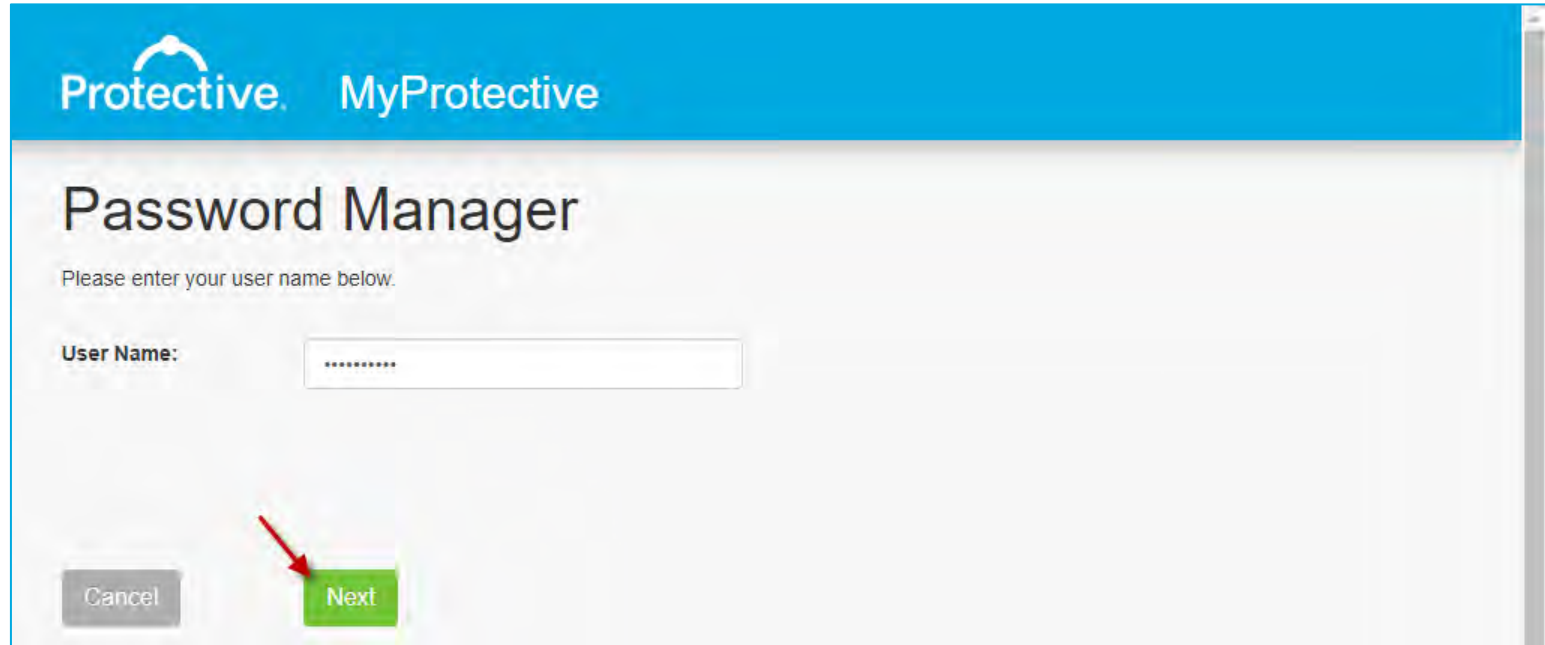
Please remember to delete any sub-users that are no longer employed by you.

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

## Step 3: Sub-user receives reset email and clicks link to reset password (link expires after one hour).



Step 4: Sub-user enters user name and can request it from the primary user if unknown.



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## Password Manager

Please enter your user name below.

User Name:

## Step 5: Sub-user creates a new password that matches the requirements listed.

Protective. MyProtective

### Password Manager

Enter and confirm your new Password below. Click the Submit button to complete the process.

**New Password:\***

**Confirm New Password:\***

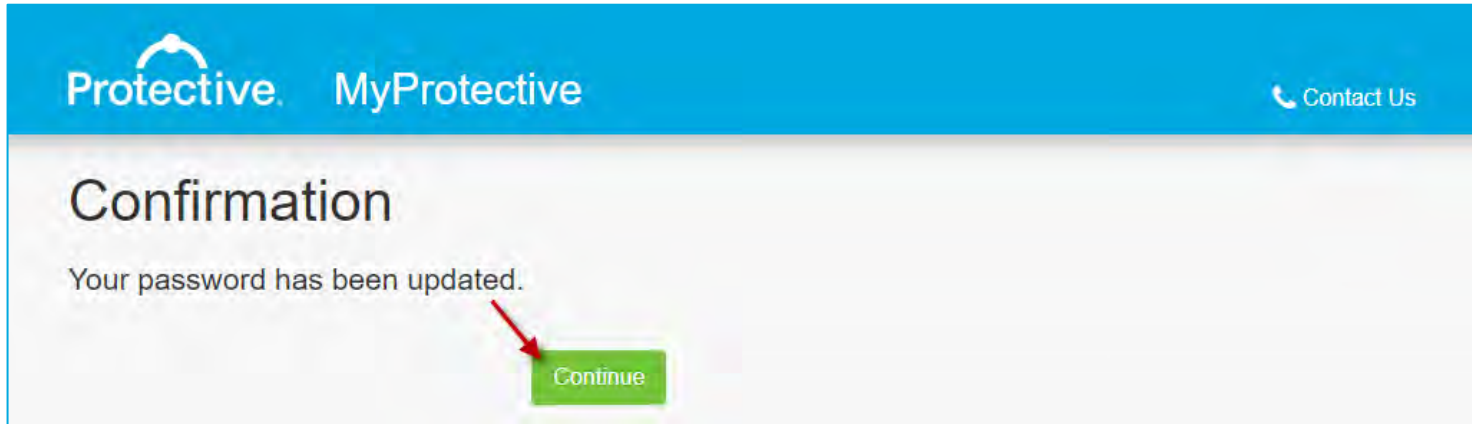
\* Required

**Cancel** **Finish**

**Password Requirements:**

- 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

Step 6: Sub-user clicks “Continue” to confirm new password and also receives a confirmation email.





## Step 7: Sub-user is taken to a MyProtective.com log in page for access.

**Protective. MyProtective** [Contact Us](#)

### Welcome to MyProtective

- Manage your business on the go with our mobile-friendly site
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**LOG IN**

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

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

Remember Me **LOG IN**

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

## Step 8: Sub-user successfully logs in.

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