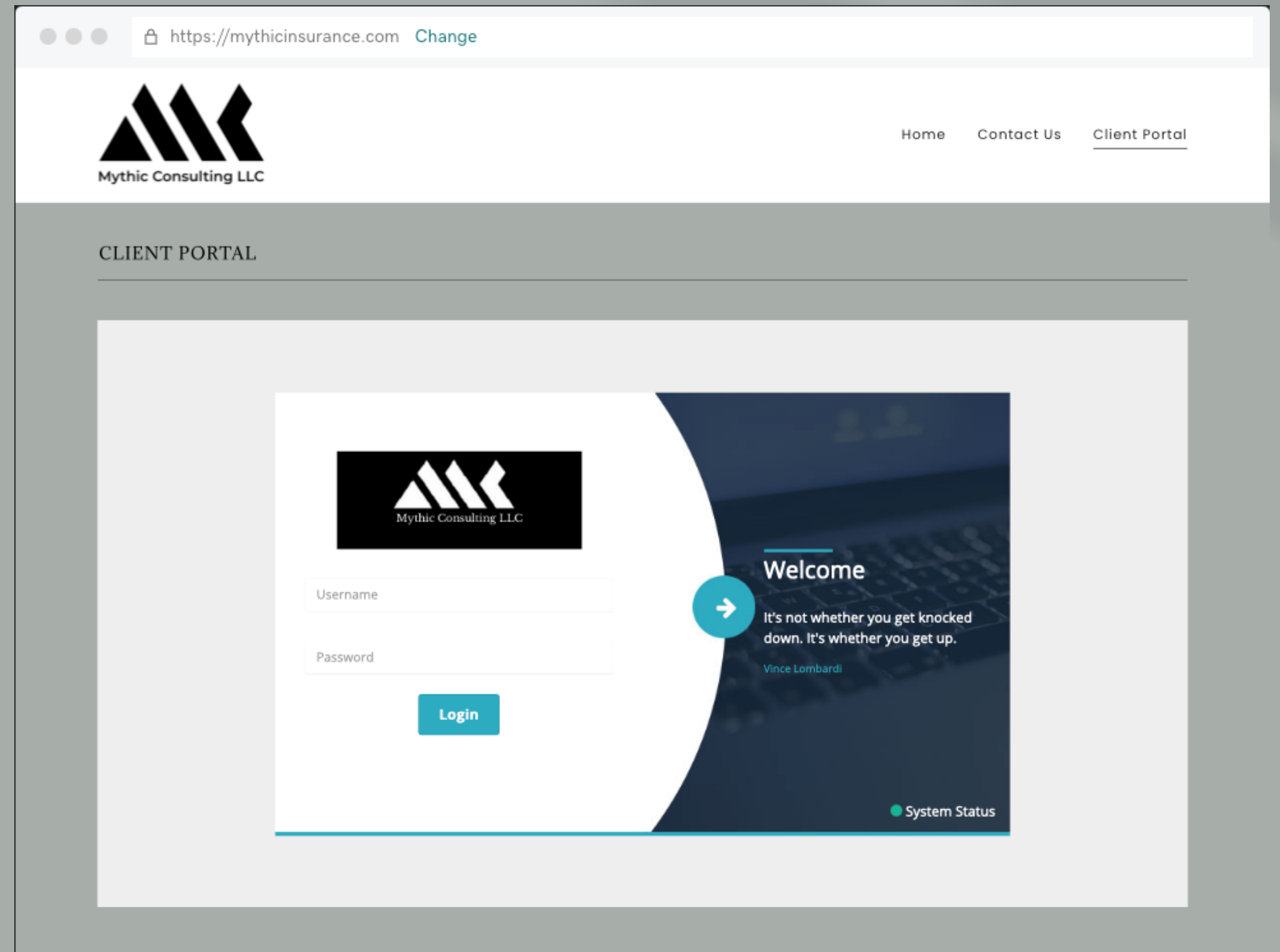


CLIENT PORTAL

Users Guide/FAQ's



What do I do after I log on?

How do I find my policy?

Below is a screenshot of the home screen of your portal page. To view your policy, simply click on the Policies tab. You can also view your full policy by clicking on the Documents tab and navigating to Files. A PDF of your policy is available for downloading from the Files section of the portal.

Commercial Insured

Name	DBA	Type Of Business	Insured ID	Customer ID	FEIN	Primary Contact	Primary Agent	Primary Account Manager / CSR	Primary Office
Vendalay Industries	n/a	LLC	10145	n/a	n/a	Colter Bean	Colter Bean	Heather Bean	n/a

Address	E-mail	Phone / Cell	Fax	Social	Origin
1000 Test Drive Birmingham, Alabama, 35216	cbean45@aol.com	n/a	n/a		Manual

Agency Mythic Consulting, LLC

Address	City / State / ZIP	E-mail	Phone / Cell Phone
2015 Stonegate Trail, Suite 115	Birmingham, Alabama, 35242	colter@mythicinsurance.com	205-460-1334 / 205-835-3542

Agents

Name	E-mail	Phone	Cell Phone	Fax
Colter Bean	colter@mythicinsurance.com	205-835-3542	205-835-3542	n/a

CSRs

Name	E-mail	Phone	Cell Phone	Fax
Heather Bean	heather@mythicinsurance.com	n/a	205-725-1985	n/a

List of Contacts

First Name	Last Name	Type	Primary Contact	Personal E-Mail	Active	Business E-Mail	Home Phone	Office Phone	Cell Phone	Birthday	SSN	Policy	Des
------------	-----------	------	-----------------	-----------------	--------	-----------------	------------	--------------	------------	----------	-----	--------	-----

Home

Service Requests

Name

activeinactive

Vendalay Industries

1000 Test Drive, Birmingham, AL, 35216

cbean45@aol.com

Colter Bean

CONTACTS: Colter Bean (colterbean45@gmail.com)

General

Policies1

Documents

Search

Policy Number

Policy Number

Eff. Date (from - to)

Date From:Date To:

Change Date (from - to)

Date From:

Bind Date (from - to)

Date From:Date To:

Binder ID

Binder ID

Business Type

[All]

Create Date (from - to)

Date From:Date To:

Billing Type

[All]

State

[Please choose]

Auto Renew

[All]

Status

Active

Line of Business

[Type and/or Choose]

Policies

Policy Number	Eff. Date	Exp. Date	Bind Date	Binder ID	Canc. Date	Lines of Business	Carrier	MGA	Full Term Premium
<div></div> TEST-001	03/12/2021	03/12/2022				Medical Malpractice, Gene...	The Doctors Company		\$0

HOW DO I PRINT MY POLICY?


To print your policy, click on the printer icon next to the policy number.

To simply view the policy details, click on the policy number itself.

HOW DO I VIEW MY LOCATION AND CONTACT INFORMATION?

To view the location and contact details we have on your account, simply hover your mouse over the General tab and you will see a drop down box appear. You can find the following information in this area:

- Information - if you select this option, you will be taken back to the Home Screen. You can also reach the same location by clicking the Home option in the left side menu.
- Locations - if you select locations, you will see all addresses we have on file for your account. This includes any special billing addresses or the address of various branch locations.
- Contacts - the Contacts page will list the name and contact information for all franchise personnel. If any updates need to be made, please contact us (info@mythicinsurance.com).
- Linked Insureds - this option will allow you to view associated insureds who are part of your parent organization, but have their own independent policy numbers.



☰

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Home

Service Requests

Name

activeinactive

Vendalay Industries

1000 Test Drive, Birmingham, AL, 35216cbean45@aol.comColter Bean

CONTACTS: Colter Bean (colterbean45@gmail.com)

General

Search

Policy Number

Policy Number

Bind Date (from - to)

Date From

Calendar icon

Date To:

Calendar icon

Create Date (from - to)

Date From:

Calendar icon

Date To:

Calendar icon

Auto Renew

[All]

Information

Locations1

Contacts1

Linked Insureds

Eff. Date

Date From

Binder ID


Billing To

[All]

Status

Active

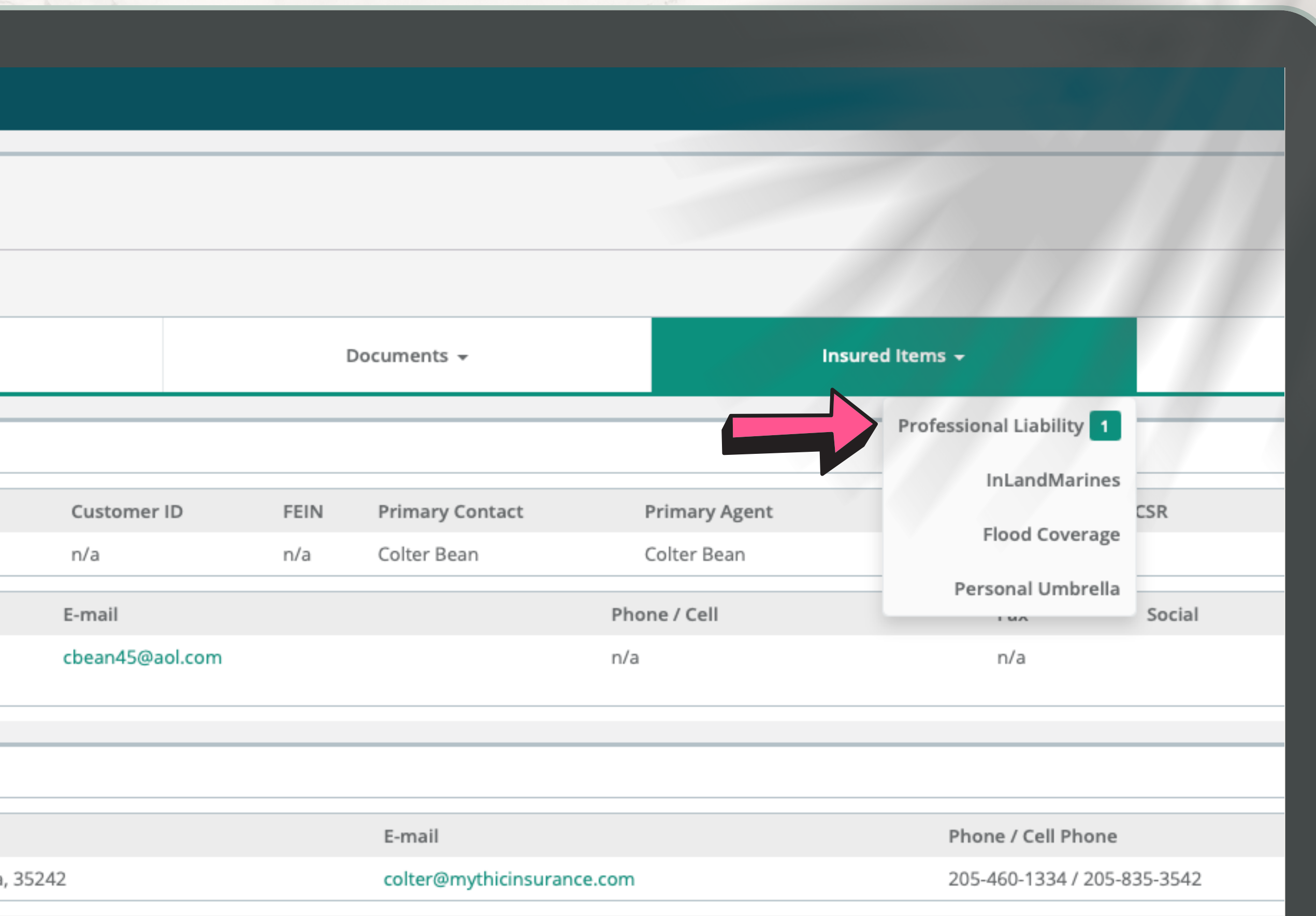
Policies

	Policy Number	Eff. Date	Exp. Date	Bind Date	Binder ID
	TEST-001	03/12/2021	03/12/2022		

WHERE CAN I VIEW MY ROSTER OF PROVIDERS?

To view your current roster of providers, navigate to the Insured Items tab on the Home page. Hover over this tab and a drop down box will appear. Choose Professional Liability to see a roster of all of your active providers.

If changes to the roster need to be made, please detail the necessary changes on the Add/Term Form (a PDF is located under Documents/Files) and submit it to our office (info@mythicinsurance.com).



The screenshot shows a web interface with a dark teal header. Below the header, there are two tabs: "Documents" and "Insured Items". The "Insured Items" tab is highlighted in a darker teal. A pink arrow points to the "Insured Items" tab, which has a dropdown menu open. The dropdown menu lists four options: "Professional Liability" (with a small teal square containing the number 1), "InLandMarines", "Flood Coverage", and "Personal Umbrella". Below the tabs, there is a table with the following data:

Customer ID	FEIN	Primary Contact	Primary Agent	CSR
n/a	n/a	Colter Bean	Colter Bean	

E-mail	Phone / Cell	Social
cbean45@aol.com	n/a	n/a

E-mail	Phone / Cell Phone
colter@mythicinsurance.com	205-460-1334 / 205-835-3542