

FPL Assist Web Portal Update Profile - Manager

Introduction

The following module will provide you with instructions to view, update or add agency information after you have logged into the FPL Assist Web Portal.

At the end of this module, you will be able to view and update the following:

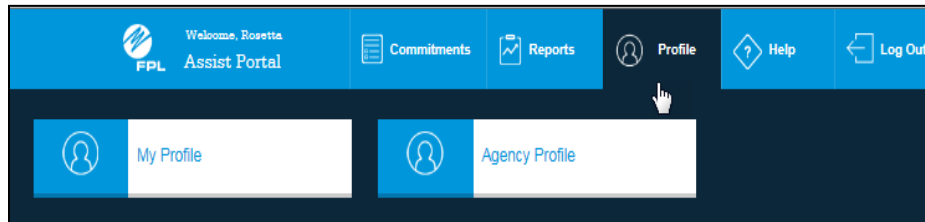
- Agency Profile Information, and
- Manage Reps Information



Manager's Role - Agency Profile

In addition to the My Profile tab, the Manager's role has an **Agency Profile** tab. This tab allows administrators to modify and make various updates to their agency profile.

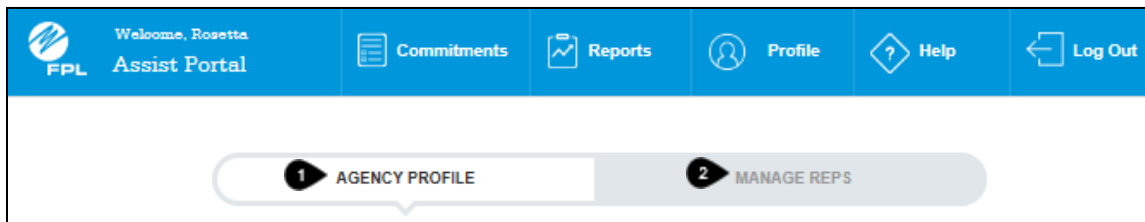
The following steps provide instructions for accessing your agency's profile.



Step	Action
1	Click Profile on the top menu bar
2	Click My Agency Profile

After the Agency profile is selected, the following two options will appear:

- 1) Agency Profile
- 2) Manage Reps



Agency Profile Tab

The table below describes the sections and fields for the Agency Profile Tab.



a

Agency Information

Agency Name	IM FPL Test Agency
Agency Code	0000000
Agency Status	Active
County	Miami-Dade
Agency Type	Other
Funding Source	ASST, C2S, EHEAP, FEMA, LIHEAP
Federal ID Number	77-7777777

Physical Address	123 ABC Lane Miami, FL 11111	Edit
Mailing Address	123 ABC Lane Miami, FL 11111	Edit

b

Contact Information

Primary	Rep Primary	Edit
Alternate	Rep Alternate	

Phone	999-999-9999	Edit
Fax	999-999-9999	

Agency Primary Email	email@email.com	Edit
Agency Secondary Email	email@email.com	

Days/Hours of Operation	M-F 5 to 6	Edit
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Part	Name	Description
a	Agency Information	<p><u>Non-Editable Fields</u></p> <ul style="list-style-type: none"> Agency Name Agency Code Agency Status County Agency Type Funding Source Federal ID Number <p><u>Editable Fields</u></p> <ul style="list-style-type: none"> Agency Physical Address Agency Mailing Address
b	Contact Information	<p><u>Editable Fields</u></p> <ul style="list-style-type: none"> Primary Contact Information Alternate Contact Information Agency Phone Agency Fax Agency Primary Email Agency Secondary Email Agency Hours of Operation <p>Important: Click the edit link to update these fields</p>

Manage Reps Tab

The table below describes the information and fields in the Manage Reps window.

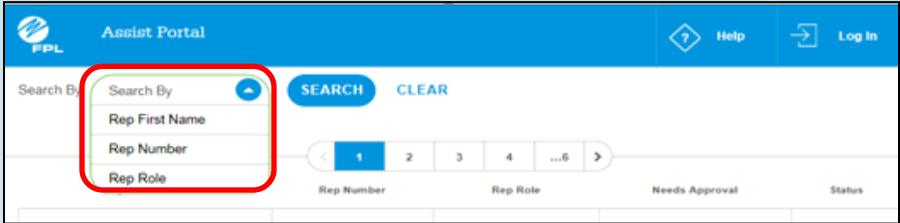
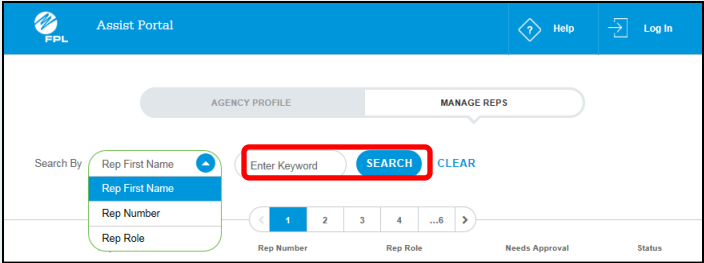
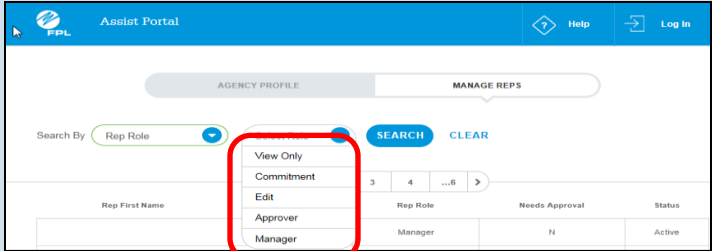
The screenshot shows the 'MANAGE REPS' tab selected in the top navigation bar. Below the navigation bar, there is a search section with a 'Search By' dropdown menu (callout 'a'), a 'SEARCH' button, and a 'CLEAR' button. A pagination control (callout 'b') shows page 1 of 6. The main area contains a table with columns: Rep First Name, Rep Number, Rep Role, Needs Approval, and Status. The table lists three records (callout 'c'). Below the table, there are radio buttons for 'Show Active' (selected) and 'Show Inactive' (callout 'd'). An 'ADD REP' button (callout 'e') is located at the bottom right. A second pagination control is visible at the bottom of the page.

Rep First Name	Rep Number	Rep Role	Needs Approval	Status
Abc Rep	56789985	Manager	N	Active
Abc Rep	56789985	Manager	N	Active
Abc Rep	56789985	View Only	N	Active

Part	Name	Description
a	Search Option	Option to search for Reps: First Name, Number or Role
b	Page Selector	Allows user to select page to view Note: Only displays when more than 23 records exist.
c	Rep Listing	Displays the following rep information: <ul style="list-style-type: none"> • Name • Number • Role • Approval status • Status Important: Rep information may be modified by clicking on the agent's name
d	Active/Inactive View Option	Allows user to sort list by Active versus Non-Active agents within one's agency
e	Add Rep Option	Allows user to add a new rep's information to their agency group

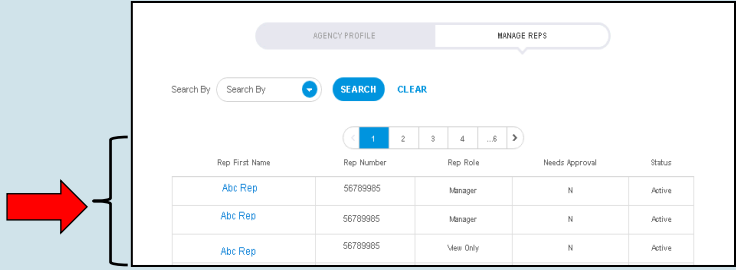
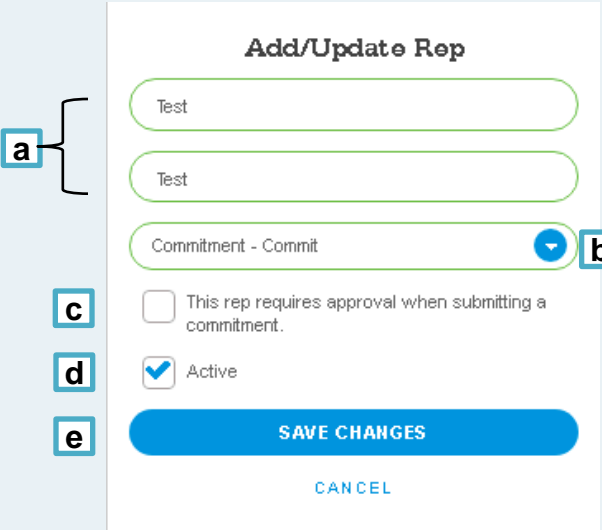
Manager's Rep – Search Option

The following steps provide instructions for using the search option within the Manager's Role option.

Step	Action
1	<p>Click preferred search option from dropdown list</p> <ul style="list-style-type: none"> Rep First Name Rep Number Rep Role 
2	<p>If searching by a Rep's First Name or Number, you will need to enter a keyword and then click search.</p> 
	<p>If searching by a Rep's Role, you will need to select a role and then click search.</p> 

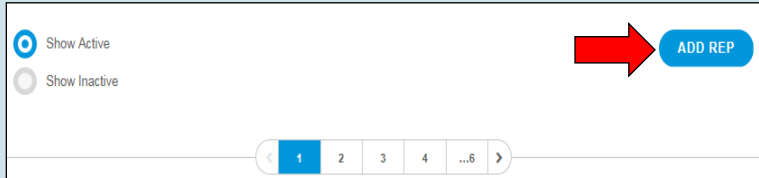
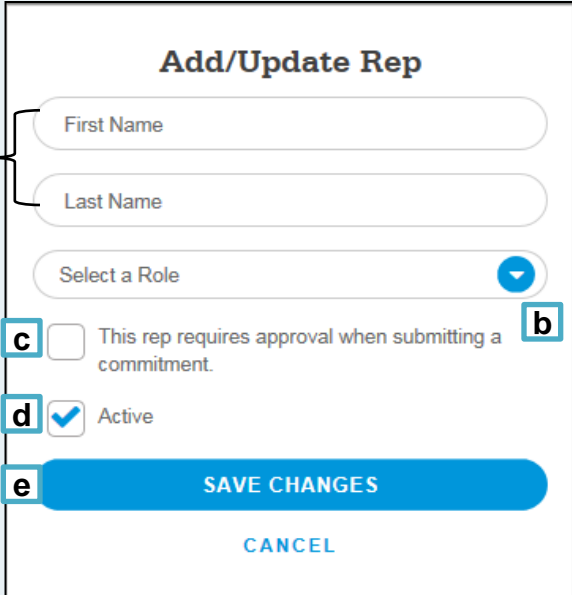
Manager's Rep – Editing an Existing Rep's Information

The following steps provide instructions for editing an existing rep's information.

Step	Action													
1	<p>Click on name you would like to modify</p> <p>Note: Add/Update Rep window will appear.</p>													
2	<p>Once the Add/Update Rep window appears, you can update the following:</p> <table border="1" data-bbox="224 808 946 1336"> <thead> <tr> <th data-bbox="224 808 369 868">Part</th> <th data-bbox="369 808 946 868">Action</th> </tr> </thead> <tbody> <tr> <td data-bbox="224 868 369 1001">a</td> <td data-bbox="369 868 946 1001">Correct – This is used to update the First and Last Name if update is needed</td> </tr> <tr> <td data-bbox="224 1001 369 1093">b</td> <td data-bbox="369 1001 946 1093">Select desired role from drop-down option</td> </tr> <tr> <td data-bbox="224 1093 369 1182">c</td> <td data-bbox="369 1093 946 1182">Select when rep requires approval when submitting a commitment</td> </tr> <tr> <td data-bbox="224 1182 369 1275">d</td> <td data-bbox="369 1182 946 1275">Select to make rep Active and deselect for Inactive option</td> </tr> <tr> <td data-bbox="224 1275 369 1336">e</td> <td data-bbox="369 1275 946 1336">Click to Save Changes</td> </tr> </tbody> </table>	Part	Action	a	Correct – This is used to update the First and Last Name if update is needed	b	Select desired role from drop-down option	c	Select when rep requires approval when submitting a commitment	d	Select to make rep Active and deselect for Inactive option	e	Click to Save Changes	
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Manager's Rep – Adding a New Rep's Information

The following steps provide instructions for adding a new rep's information to your agency's group.

Step	Action													
1	<p>Click Add Rep</p> <p>Note: This option is located at the bottom of the Manage Rep window</p>													
2	<p>Once the Add/Update Rep window appears, you can update the following:</p> <table border="1" data-bbox="224 876 946 1346"> <thead> <tr> <th data-bbox="224 876 369 936">Part</th> <th data-bbox="369 876 946 936">Action</th> </tr> </thead> <tbody> <tr> <td data-bbox="224 936 369 1008">a</td> <td data-bbox="369 936 946 1008">Type First and Last Name field</td> </tr> <tr> <td data-bbox="224 1008 369 1100">b</td> <td data-bbox="369 1008 946 1100">Select desired role from drop-down option</td> </tr> <tr> <td data-bbox="224 1100 369 1189">c</td> <td data-bbox="369 1100 946 1189">Select if rep requires approval when submitting a commitment</td> </tr> <tr> <td data-bbox="224 1189 369 1282">d</td> <td data-bbox="369 1189 946 1282">Select – Deselect if rep will be inactive</td> </tr> <tr> <td data-bbox="224 1282 369 1346">e</td> <td data-bbox="369 1282 946 1346">Click to Save Changes</td> </tr> </tbody> </table>	Part	Action	a	Type First and Last Name field	b	Select desired role from drop-down option	c	Select if rep requires approval when submitting a commitment	d	Select – Deselect if rep will be inactive	e	Click to Save Changes	
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