



# Independent Mutual –Introduction & Logging into AgenTree

Welcome to Independent Mutual and to the AgenTree policy administration system. We are glad to have you as part of our team.

This step by step guide will help you to navigating the AgenTree system and successfully managing your fire business!



## Introduction

AgenTree is a powerful and innovative agency management system that allows Agents and General Agents 24/7 access to all policies assigned to their agency. Using AgenTree, Agents:

- Have 24/7 access to policies
- Provide a quote for a new policy
- Print application and endorsements forms
- Print declaration pages and duplicate policies
- Print duplicate billing notices and other correspondence
- Communicate directly with our Home Office staff

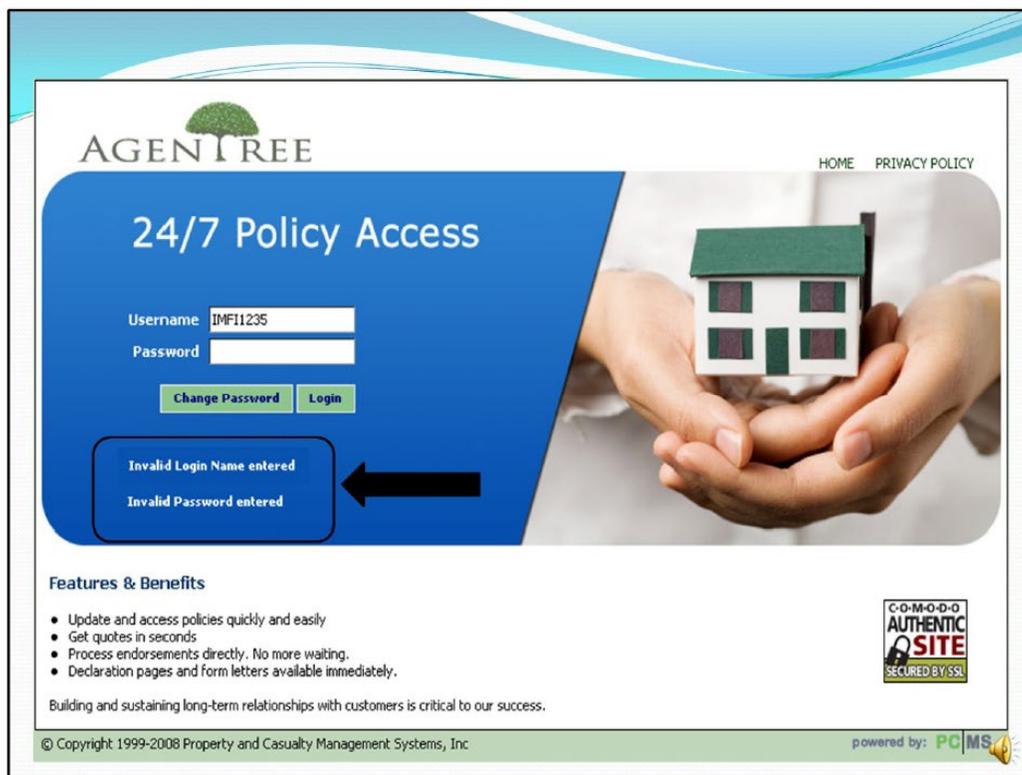
To access AgenTree you can click on the link located in your appointment confirmation e-mail. Clicking the link will automatically open your default web browser and take you to the AgenTree website. You may also copy the link below and paste into the address bar of your web browser. Be sure to save the link to your favorites for easy access later.

<https://imfiagent.pcmstech.com/pages/Index.aspx>

## Logging In

If this is your first time logging into AgentTree you will need the Username and Password from your Welcome Email.

If you do not have this information please contact the Home Office at (800) 248-7072. Select the option for Agent Services. Once you have obtained your Username and Password you are ready to login.



The screenshot shows the AgentTree login interface. At the top left is the AgentTree logo. To the right are links for HOME and PRIVACY POLICY. The main heading is "24/7 Policy Access". Below this is a login form with fields for Username (containing "IMF11235") and Password. There are "Change Password" and "Login" buttons. A blue box contains the error messages "Invalid Login Name entered" and "Invalid Password entered", with a black arrow pointing to the "Login" button. Below the form is a "Features & Benefits" section with a bulleted list of services. At the bottom right is a "COMODO AUTHENTIC SITE SECURED BY SSL" badge. The footer contains copyright information for Property and Casualty Management Systems, Inc. and a "powered by: PCMS" logo.

Enter your username and password as they appear on your Welcome letter attached to the Welcome email or as given to you by Home Office staff. The username is NOT case sensitive. Your password however, IS case sensitive.

If your login is not successful, look under the Change Password and Login buttons as shown in the above screenshot. You will see message in white text that will indicate whether your password has expired or that you have entered an invalid Login Name or Password. If you receive a message indicating that you have entered an invalid Login Name or Password, please try the following.

## Helpful Hints

- Username – (NOT case sensitive)
  - Your user ID is your agency number.
  - Make sure your agency number is correct and that there are no spaces in your username.

- Make sure that you are entering the letter O or the number ZERO where appropriate.
- Password – (ARE case sensitive)
  - Be sure you are using upper case and lower case letters as appropriate.
- If you still need assistance please call (800) 248-7072 and select option four (4) for Agent Services then option three (3) for AgenTree Password Resets.

## Changing Your Password

Your password is set-up to expire about every 45 days and the system will require you to change it. If you received the message “Your password has expired. Please change the password,” click on the button labeled Change Password. You will then be re-directed to the change password screen.

**Changing your Password!**

AGENTTREE

HOME PRIVACY POLICY

24/7 Policy Access

Username

Password

[Change Password](#) [Login](#)

Your password has expired. Please change the password.

**Features & Benefits**

- Update and access policies quickly and easily
- Get quotes in seconds
- Process endorsements directly. No more waiting.
- Declaration pages and form letters available immediately.

Building and sustaining long-term relationships with customers is critical to our success.

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