A DELTA DENTAL°

Broker Services Portal (BSP) Quick Guide

How to give Commissions Report access

Broker Super Users and Broker Delegates who have Commissions Statement access can grant access to other users.

1. On the left navigation menu, click **Users**.

Image 1

- 2. Find the broker who will be given Commissions Report access by searching via one of the following fields:
 - Last Name
 - First Name
 - User ID
 - Email
 - Company

Image 2

3. Click on the last name of the user.

Image 3



User Adr	nin					A	dd User
Manage Client Users	Manage Broker Use	rs Export User Rep	ort Manage Interna	Il Users			
Last First Name	t Name	User ID	Email	Role	Company	Status	Last Log In
Search Q Sea	irch Q	Search Q	Search Q	7	Search Q	∇	\mathbb{V}
Last Name Fin	st Name	X00000000X	X0000000X	xx0000000x	Company-Name	Active	04/03/2023 11:57:40 AM
Last Name Fir	st Name	XX00000000X	XX00000000X	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Company Name	Active	03/31/2023 3:37:25 PM

3	Manage Client Use	rs Manage Brok	er Users Export Use	r Report Manage I	nternal Users			
	Last Name	First Name	User ID	Email	Role	Company	Status	Last Log In
	Search Q	Search Q	Search Q	Search Q	7	Search Q	∇	7
	Last Name	First Name	XXXXXXXXXXXX	XXXXXXXXXXXX	XX0000000XX	Company Name	Active	04/03/2023 11:57:40 AM
	Last Name	First Name	XX000000XX	XXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Company Name	Active	03/31/2023 3:37:25 PM

4. Click Edit Access.

Image 4

 Click all relevant brokers name(s) to give this user access to their commission reports. *Image 5*

4	
	Access
	Commissions statements access for agency: XXXXXXXX
	Indicates block of business access
	✓ First Name Last Name
	✓ First Name Last Name

6. Click the check box for Commissions Report access.

If the Commissions statement access for agency check box is checked, user will have access to all client's and broker's commission reports in the agency.

Image 6

7. Repeat steps 5 and 6 for any brokers you want to apply these settings to.

5	
	Access Edit Access
	Commissions statements access for agency: XXXXXXX
	1ª Indicates block of business access

Access Save Cancel
Commissions statements access for agency: XXXXXXXXX I Indicates block of business access
First Name Last Name
Block of business access
Select All

8. Click Save.

Image 7

