Branch Administrator User Guide

ERS eTrade
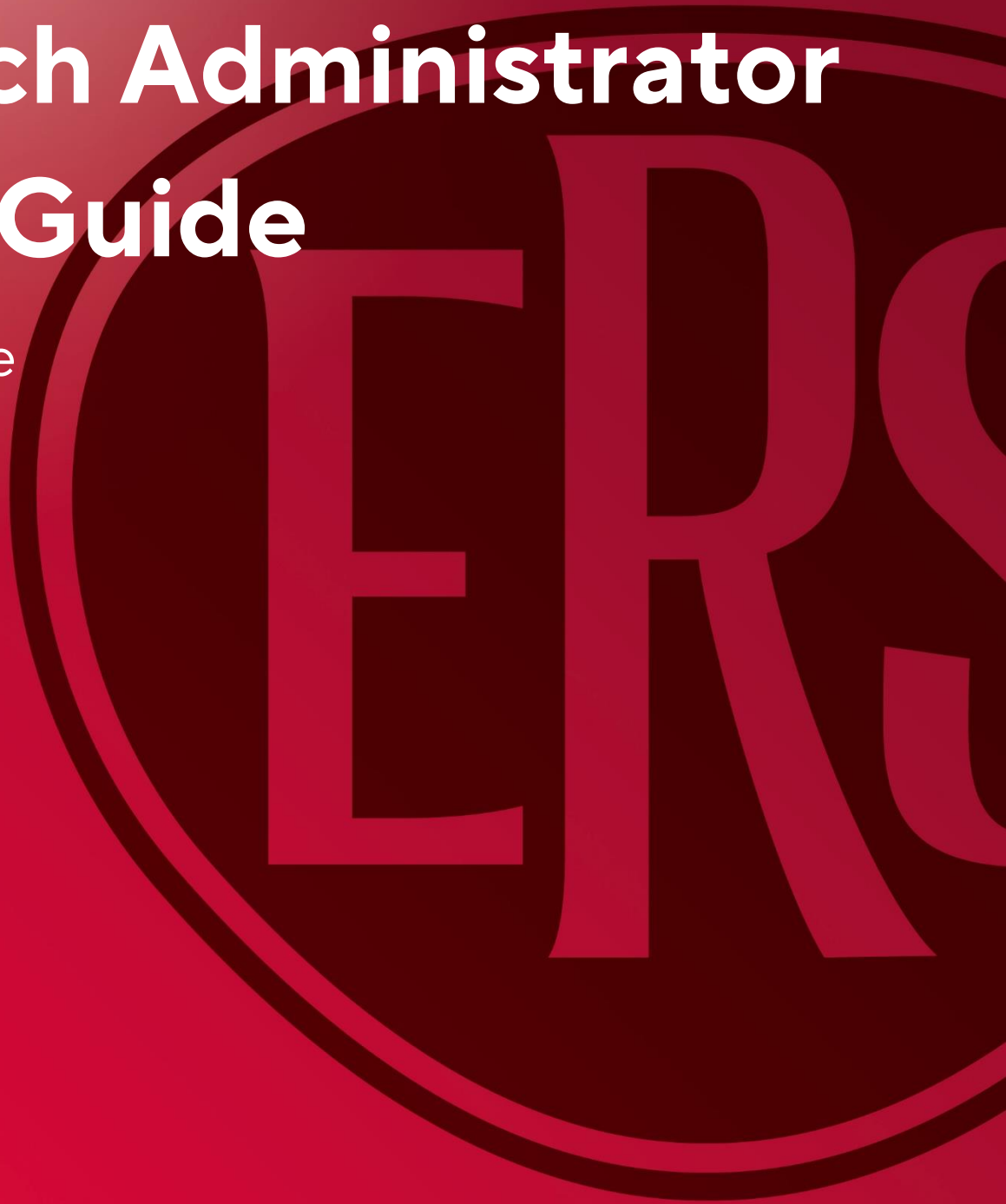
Contents

1   Welcome to ERS online

Thank you for registering for ERS Online. ERS Online gives you access to our claim's portal and eTrade for online trading. As an Administrator, you have the rights to add and remove users within your agency. Here's a handy guide to get you up and running as quickly as possible, but if you do have any questions, our contact details are agency@ers.com, so please do get in touch with if you need any support.

2   Adding a colleague to ERS online

2.1 As a Branch Administrator

1. Go to the ERS Online homepage at https://drive.ers.com/

2. Log in using your ERS credentials, answer the security question and click on 'Submit'

3. Select the menu on the top right corner

4. Select 'Users'

5. Click the 'Add User' button

6. Add the company email address of the user you wish to add

7. Select the 'User type' from the drop-down field (User or Branch Admin)

8. Switch user to 'Active'

9. Switch on the relevant user access permissions that apply

10. Click 'Save'

The user will receive an automated email instructing them to activate their account within twenty four hours.

2.2 As a Group Administrator

(If you manage access for multiple agencies with your company)

1. Go to the ERS Online homepage at https://drive.ers.com/

2. Log in using your ERS credentials, answer the security question and click on 'Submit'

3. Select the menu on the top right corner

4. Select 'Branch Search'

5. Search for, and select the relevant branch

6. Click the 'Users' button

7. Click the 'Add User' button

8. Add the company email address of the user you wish to add

9. Select the 'User type' from the drop-down field (please note as a Group Administrator, you are able to give access to users for specific branches only – Branch user – or all branches within your group – Group user)

10. Switch user to 'Active'

11. Switch on the relevant user access permissions that apply

12. Click 'Save

The user will receive an automated email instructing them to activate their account within twenty four hours.

3 Maintaining Security

In order to protect against potential fraud, there are a number of precautions you should take while using ERS Online

1. Keep passwords safe by:

   • Not writing down, or storing your username or password on your computer

   • Not giving anyone else access to your username or password

   • Changing your password if you think that someone else knows it — you can do this by logging in to ERS Online and using the 'Change Password'.

2. Make sure your password is secure by:

   • Choosing a 'strong' password (minimum eight characters, upper and lower case, alphanumeric and special characters)

   • Use a mix of letters, numbers and special characters that you can remember without writing it down and avoid using words that may be easy for others to guess.

3. Always log out:

   • Finally, always click 'Log out' when you've finished using ERS Online wherever you are

   • Always close your browser.

4 FAQ's

How do I log in to ERS Online?

Go to the ERS Online homepage at https://drive.ers.com/login (click the star or bookmark icon in your browser to save the page, making it easy to find in the future)

Can I add a shared mailbox email address as a user so that multiple users can share it?

No, the system requires an individual email address and password per user, for security reasons. If your organisation is unable to accommodate this, please contact agency@ers.com with full details and we'll see what we can do to help.

What happens if I didn't activate my account within 24 hours?

Don't worry, simply forward your activation email to agency@ers.com and let them know that you missed the activation window. They'll send another activation email as quickly as they can.

Do I need any special software to use ERS Online?

No. ERS Online is a standard web-based application. All you'll need is a computer or mobile device that's connected to the internet to use it. ERS Online is compatible with Internet Explorer, Google Chrome and Firefox.

Are there any minimum password requirements?

Yes. Passwords need to be a minimum of eight characters, upper and lower case, alphanumeric and have a special character, for example !,‹*#4

What happens if I forget my password?

If you have forgotten your password, select 'Forgotten your password' link from the log in screen and follow the instructions. If you input your password incorrectly eight times, your account will be locked. You will need to contact agency@ers.com for a password reset.

How can I re-set a User's password? If you click on the ladder menu on the top right-hand corner of the screen and select 'Users', this will return a list of the Users currently active within your branch. Click the email address of the User whose password you would like to re-set and click on 'Reset Password' this will automatically send an email to the user with a link for them to re-set.

Does it cost anything to use ERS Online?

No. ERS Online is completely free to use.

What is the difference between an administrator and a user?

An administrator has the rights to create, amend and deactivate accounts for your brokerage. A user is able to utilise the applications made available to them.

How do I pass on administration rights to someone else in my company? If you'd like someone else to be the administrator, simply amend their profile via the 'User Type' drop down field within the 'User Details' screen. Don't forget to share this guide with them.

What happens if someone leaves my company?

If someone with access to ERS Online leaves your company, please go to your list of users, select the user you wish to deactivate, change the user 'Active' switch to 'Off' and then by saving you have removed access. You can reactivate them by retracting these steps at any time and reactivating via the same user active switch. (Please note that only the branch administrator has the rights to do this)

If the user you wish to deactivate is a branch administrator, please contact agency@ers.com and provide details along with your new branch administrator to manage your accounts for your brokerage.

Can I add multiple colleagues at once?

No, currently you can only add one colleague at a time to ERS Online.

Is there any eTrade training available for users?

Yes. Along with some training assets as walkthrough videos and a user guide we can offer bespoke training for your team. Get in touch with your Regional Development Manager who can arrange this for you

5 How do I contact you if I need help?

If you need some help using the platform, please use the below contacts who are happy to help

Query	Contact Details
ERS Online Access	agency@ers.com
eTrade Queries	Refer to our FAQ's
eTrade Technical Queries	Please contact your Regional Development Manager