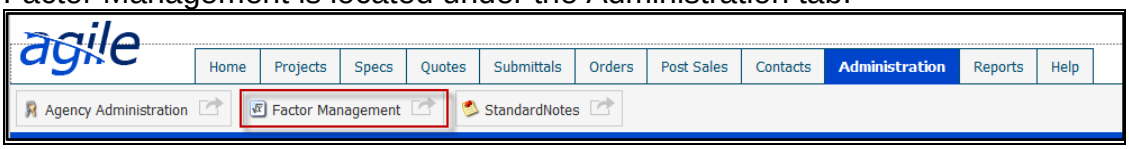
agile Factor Management – Quick Reference Guide

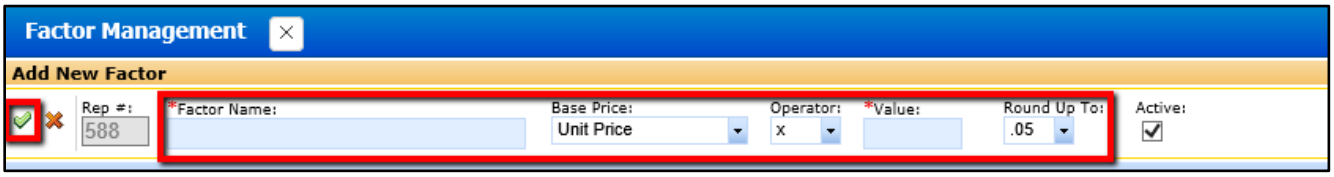
Factor Management is located under the Administration tab.



Add new factor

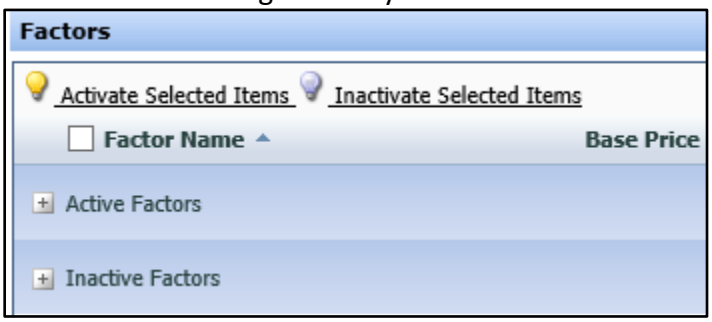
Note: Factors cannot be edited or deleted, but can be inactivated. It is important to validate the information prior to accepting the new factor to avoid inaccuracies and duplicates.

- Enter the factor name
- Select a base price from the drop down
- Select an Operator from the drop down
- Enter the value amount to be calculated
- Select the round up to amount
- Click the green check mark (to the left) to apply the factor

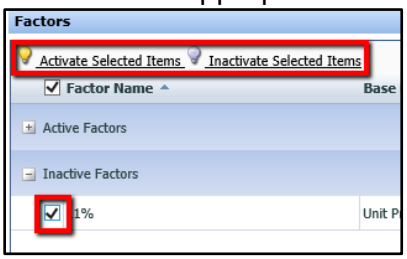


Activating/Inactivating a Factor

- The dashboard is organized by Active and Inactive Factors



- To activate or inactivate a Factor, check the box next to the factor you want to activate/inactivate then click the appropriate action

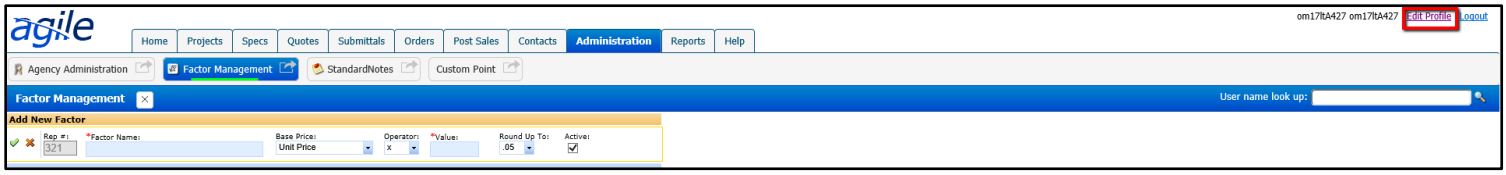


Revised: 5/21/2019

Configuring factors for agents that have multiple agency numbers

For agents that are set up for multiple agencies, the user will need to use the 'Edit Profile' method to toggle between agents to manage/configure factors.

Select **Edit Profile** in the upper-right of the screen



Select the dropdown arrow next to 'Default Agency' and choose which agent number the factor needs to be configured on.

Select **Update Profile** and proceed to create/manage factors

