

Introduction

This Sub-User Guide is intended to describe the following SMART features:

Managing User Profiles as an Administrative User (Search/Edit>Brokers>Security)

NOTE: This information is also included as part of the entire and comprehensive User Guide: Broker Search

Prerequisites

Prior to accessing SMART and/or utilizing the API, you are required to accept any licensing agreements: Privacy Policy, Terms of Use, and SMART Connector and/or API User Licensing Agreement (when applicable).

Environments

The following URLs are used for SMART:

Test: <https://test.sltx.org/> **Production:** <https://smart.sltx.org/>

Primary Navigation

Click "Manage Users" from Broker Landing page.

This is where you (administrative user) will [invite new users to SMART](#) or [manually create new SMART user profiles](#), [edit or maintain existing user profiles](#) (including [resetting passwords](#)), or update your [Primary / Secondary \(Online Filing\) contact information](#). Note: Testing (or approval to begin filing) is not required unless you are an API (XML) filer, or your agency is using a 3rd party to make filings on your behalf. SMART's [Programmer Technical Reference Manual](#) includes details about the requirements for application / feature testing. Third-Party filers have specific user *and* testing requirements. Please contact [TechSupport](#) directly for further information.

How are you today, **Your Name Here?**
Broker: SLTX TEST AGENCY

Pending Payment **\$8,657.30**
[Pay Invoice](#)

Outstanding Errors (Tags) You have 847 items that have one or more errors (tags).
[View Errors \(Tags\)](#)

YTD OVERVIEW

Policy Premium	Policies	Total Tax	Stamping Fee
\$13,134,122.36 ↓ 86.97%	117 ↓ 98.25%	\$642,356.81 ↓ 86.85%	\$6,367.37 ↓ 91.58%

What would you like to do today?

- FILE**
View and Upload API Filings
Data Entry
Policy Limits Upload
- PAY**
- REPORTS**
Policies and Premium Dashboard
View Reports
Outstanding Errors (Tags)
- AUDIT**
Complete Policy Audit

Settings & Help

- Manage Users** (highlighted with a red box)
- [Helpful Documents](#)
- [Need More Help?](#)

Add New Users

Step 1: Click Add User button to manually create or add a new user profile

Home / Search - Edit / Brokers / 99999

SLTX TEST AGENCY API

TDI License No. 99999 | TDI Broker ID 666666666 | NPN

LICENSE/CONTACT MONTHLY TOTALS FILING / CONTRACTS LATE FILING AUDIT M&A HISTORY SECURITY

Security Edit

Online Filing Contact

Phone (512) 555-1212 Primary Email YOUREMAIL@EMAIL.COM Secondary Email YOUREMAIL@EMAIL.COM

Broker Status Active Max Login Attempts 10 Password Expire Days 90

Users Documents Pending Approval Sent Invitations **Add User** Invite New User Display

USER ID	NAME	EMAIL	ROLE	STATUS	TYPE OF ACCESS	APPROVED BY	LOGIN ATTEMPTS	PASSWORD EXPIRES	ACTION
NAMEU	YOUR USER NAME	NAME@EMAIL.COM	Administrative	New	Filing & Payments		0	11/12/2024	

Step 2: Input User's Name, User ID, Email, and Password. Once appropriate role for the user is selected, click SAVE.

Add User

Name

User ID

Email

Type of Access

Status Active Inactive

Password

Role Administrative Regular User

DELETE Cancel SAVE

*Clicking CANCEL will not save your changes!

Note: Administrative Authority allows user to create new and/or maintain user profiles.

Step 3: Contact your new user directly to provide them with their User ID and password.

Password Requirements

Must be a combination of alphanumeric characters, containing at least 1 special character, and between 8 and 20 characters long. Note: A password may not contain the broker or user's name(s) or User ID.

User ID Requirements

Must be between 3 and 10 characters long and unique. You will be prompted to select another User ID if prompted one is in use. Once created, a User ID cannot be changed.

Approved By

Name of SLTX employee who approved agency's user's test transactions, or license number of broker or agency where the user previously tested.

Invite New Users (Alternative Workflow from “Add New User”)

Step 1: Click Invite New User button to invite new user to SMART, which allows invited user to create profile and password through a series of secure email communications directly from SMART.

<Benefit> You will not have to coordinate with that user to convey their new User ID and/or password.

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Security Edit

Online Filing Contact

Phone (512) 555-1212 Primary Email YOUREMAIL@EMAIL.COM Secondary Email YOUREMAIL@EMAIL.COM

Broker Status Active Max Login Attempts 10 Password Expire Days 90

Users Documents Pending Approval Sent Invitations Add User **Invite New User** Display

USER ID	NAME	EMAIL	ROLE	STATUS	TYPE OF ACCESS	APPROVED BY	LOGIN ATTEMPTS	PASSWORD EXPIRES	ACTION
NAMEU	YOUR USER NAME	NAME@EMAIL.COM	Administrative	New	Filing & Payments		0	11/12/2024	

Step 2: Input User's Name and Email. Once appropriate role and type of access is selected, click INVITE. Note: Administrative Authority allows user to create new and/or maintain user profiles.

Invite New User

Name

Email

Role Regular User Administrative

Type of Access Filing & Payments ACH Payments Only

This invitation will expire after 72 hours. If the user does not complete the registration within the given time-frame, you will need to "Resend" the request from the "Sent Invitations" tab.

Invite

Step 3: Invited user will receive an email from SMART, which includes a link to allow final set-up of SMART user profile.

[ENVIRONMENT: Test] SMART User Registration Invitation

T techsupport@sltx.org
To: YourEmail@Email.com

JOHN DOE
SLTX TEST AGENCY
Please click [here](#) to register.
This invitation will expire after 72 hours.

SLTX SM Tech Support
Surplus Lines Stamping Office of Texas | (800) 681-5848
1601 E Pflugerville Pkwy Suite 3301, Pflugerville, TX 78660
techsupport@sltx.org | <https://www.sltx.org/>

Step 4: After clicking link within Invitation email, **invited user** will be presented with automatically assigned User ID and allowed to input a password.

Complete Setup - New User

Broker Name SLTX TEST AGENCY	TDI License No. 99999
User Name JOHN DOE SMITH	User ID JDOE

Password [View Password Requirements](#)

Confirm Password

Register

Step 5: After noting assigned User ID and creating a password, the **invited user** will click REGISTER to complete setup of their profile.

Step 6: **Invited user** will receive a confirmation email from SMART, which includes the assigned User ID and a link to continue to the Log In screen.



Edit Existing Users

Step 1: From the Users sub-section, click pencil icon from ACTION column to EDIT existing user profiles. Functions include updating User's Name, Email, Authority, Password (see [password requirements](#)), and/or inactivating or deleting a profile. Users associated with your agency will be shown. Note: Once created, User ID cannot be changed.

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SLTX TEST AGENCY API

TDI License No. 99999 | TDI Broker ID 666666666 | NPN

LICENSE/CONTACT MONTHLY TOTALS FILING / CONTRACTS LATE FILING AUDIT M&A HISTORY SECURITY

Security Edit

Online Filing Contact

Phone (512) 555-1212 Primary Email YOUREMAIL@EMAIL.COM Secondary Email YOUREMAIL@EMAIL.COM

Broker Status Active Max Login Attempts 10 Password Expire Days 90

Users Documents Pending Approval Sent Invitations Add User Invite New User Display

USER ID	NAME	EMAIL	ROLE	STATUS	TYPE OF ACCESS	APPROVED BY	LOGIN ATTEMPTS	PASSWORD EXPIRES	ACTION
NAMEU	YOUR USER NAME	NAME@EMAIL.COM	Administrative	New	Filing & Payments		0	11/12/2024	
ACCT	YOUR ACCT USER	NAME1@EMAIL.COM	User	New	ACH Payments Only	KIM J.	0	11/12/2024	

Step 2: Once changes have been made, click SAVE. Click CANCEL and return to Security Tab without saving changes.

Edit TESTADD

Name: YOUR USER NAME

Status: Active Inactive

User ID: TESTADD

Password: [Change Password](#)

Email: NAME@EMAIL.COM

Role: Administrative Regular User

Type of Access: ACH Payments Only

Approved By: CHEYENNE

DELETE Cancel SAVE

*To change password, click "Change Password"

Step 3: To DELETE a user's profile, click DELETE.

Note: Confirm delete. It cannot be undone once confirmed.

test.sltx.org says

This action cannot be undone. Delete User TESTADD?

OK Cancel

Edit Primary / Secondary (Online Filing) Contacts

Step 1: From Security section, click EDIT button to edit primary and secondary (online filing) contact information. Functions include updating Phone Number, Primary Email, and Secondary Email. SLTX uses your Primary and Secondary Email as an additional resource to distribute email notifications about upcoming changes or releases, improvements, scheduled system outages, and/or other invaluable information.

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SLTX TEST AGENCY API

TDI License No. 99999 | TDI Broker ID 666666666 | NPN

LICENSE/CONTACT | MONTHLY TOTALS | FILING / CONTRACTS | LATE FILING | AUDIT | M&A | HISTORY | SECURITY

Security

Online Filing Contact

Phone	Primary Email	Secondary Email
(512) 555-1212	YOUREMAIL@EMAIL.COM	YOUREMAIL@EMAIL.COM
Broker Status	Max Login Attempts	Password Expire Days
Active	10	90

Users | Documents | Pending Approval | Sent Invitations

Add User | Invite New User | Display

USER ID	NAME	EMAIL	ROLE	STATUS	TYPE OF ACCESS	APPROVED BY	LOGIN ATTEMPTS	PASSWORD EXPIRES	ACTION
NAME11	YOUR USER NAME	NAME@EMAIL.COM	Administrative	New	Ellie S. Paumant		0	11/12/2024	

Step 2: Once changes have been made, click SAVE. Click CANCEL and return to Security Tab without saving changes.

Home / Search - Edit / Brokers / 99999

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LICENSE/CONTACT | MONTHLY TOTALS | FILING / CONTRACTS | LATE FILING | AUDIT | M&A | HISTORY | SECURITY

Security

Online Filing Contact

Phone	Primary Email	Secondary Email
<input type="text" value="(512) 999-9999"/>	<input type="text" value="YOUREMAIL@EMAIL.COM"/>	<input type="text" value="ACCOUNTING@EMAIL.COM"/>
Broker Status	Max Login Attempts	Password Expire Days
Active	10	90

Cancel **SAVE**

Documents sub-section

Illustrates the status of each user's acceptance of any necessary SMART End User Licensing Agreements (EULAs), Terms of Service (TOS), and/or Privacy Policies (PP). Hover over the check icon to see the date and time of the user's acceptance.

Users	Documents	Pending Approval	Sent Invitations	
USER ID ↓	PRIVACY POLICY	TERMS OF SERVICE	API END USER LICENSE AGREEMENT	SMART CONNECTOR END USER LICENSE AGREEMENT
TPWD	✗	✗	✗	✗
TESTPOST	✓	✓	✓	✓
TESTCRT	✗	✗	✗	✗

Pending Approval sub-section

Reflects any outstanding requests from users that have manually requested access to SMART, via the "Register / Create New User ID" option from the SMART Login page, that have not yet been approved (or denied) by an administrative user.

[Users](#) | [Documents](#) | **[Pending Approval](#)** | [Sent Invitations](#)

There are no users that have requested access to SMART awaiting approval.

Sent Invitations sub-section

Reflects any outstanding or incomplete invitations. If necessary, administrative user may resend invitation by clicking RESEND.

Note: once an invited user accepts and completes the [New User Invitation](#), they will no longer be shown in the "Sent Invitations" sub-section.

NAME	EMAIL	STATUS	TYPE OF ACCESS	ROLE	DATE SENT	EXPIRE DATE	SENT BY	ACTIONS
CNH TEST	CHERRERA@SLTX.ORG	Expired	Filing & Payments	User	02/17/2022	02/20/2022	TESTPOST	Resend Cancel
CHEYENNE HERRERA	CHERRERA@SLTX.ORG	Expired	Filing & Payments	Administrative	07/13/2022	07/16/2022	CHERRERA	Resend Cancel
TEST INVITE	TECHSUPPORT@SLTX.ORG	Pending	ACH Payments Only	User	09/07/2022	09/10/2022	CHERRERA	Resend Cancel

Displaying records 1 - 3 of 3.

Display Option for Users table

You may also control which basic information is displayed within Users table.

Note: Once selected, SMART will remember selection.

Home / Search - Edit / Brokers / 99999

SLTX TEST AGENCY

TDI License No. 99999 | TDI Broker ID 666666666 | NPN

LICENSE/CONTACT MONTHLY TOTALS FILING / CONTRACTS LATE FILING AUDIT M&A HISTORY SECURITY

Security Edit

Profile

Phone	Primary Email	Secondary Email
(512) 555-1212	YourEmail@Email.Com	YourEmail@Email.Com
Broker Status	Max Login Attempts	Password Expire Days
Active	10	90

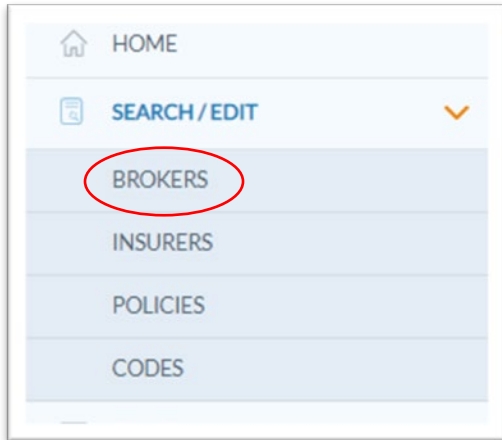
Users Documents Pending Approval Sent Invitations Add User Invite New User Display

USER ID	NAME ↓	EMAIL	ROLE	STATUS	TYPE OF ACCESS	APPROVED BY	LOGIN ATTEMPTS
NONADMIN	YOUR USER NAME	NAME@EMAIL.COM	User	Active	Filing & Payments		0

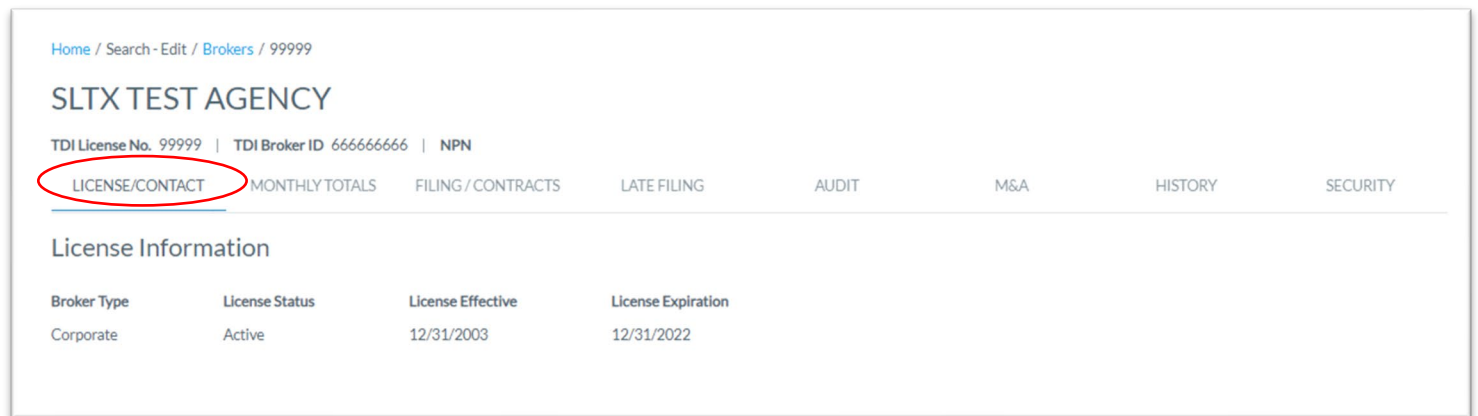
- User ID
- Name
- Email
- Role
- Status
- Type of Access
- Approved By
- Login Attempts
- Password Expires

Alternative Navigation

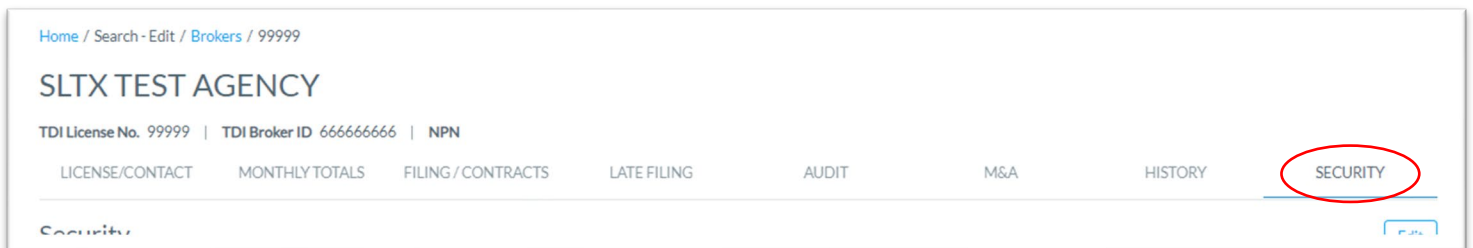
Step 1: Select Search/ Edit menu and click Brokers



Step 2: After clicking Brokers from Search/Edit menu, License/Contact tab is loaded by default.



Step 3: Select Security tab to perform all available user maintenance functions.



Version Changes

1.0

First documentation released for Search/Edit>Brokers>Security sub-section