

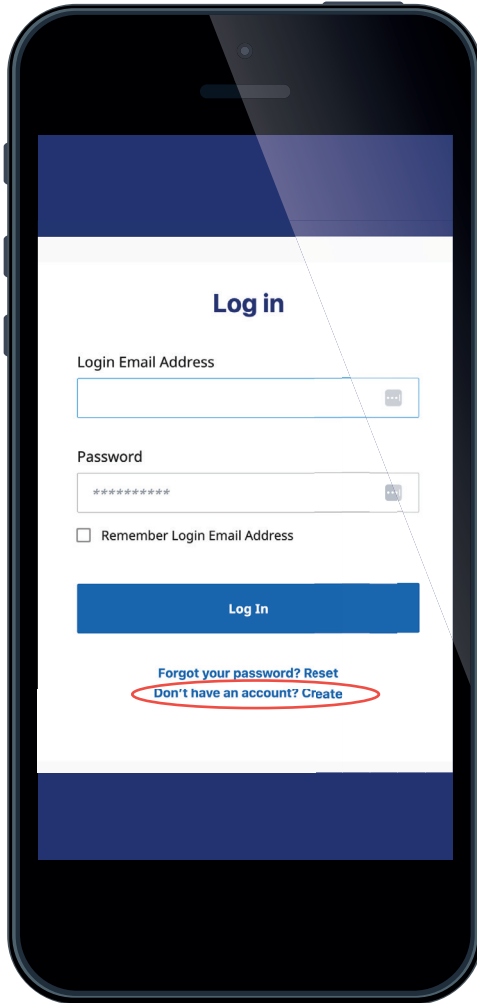


# Marsh Insurance Portal

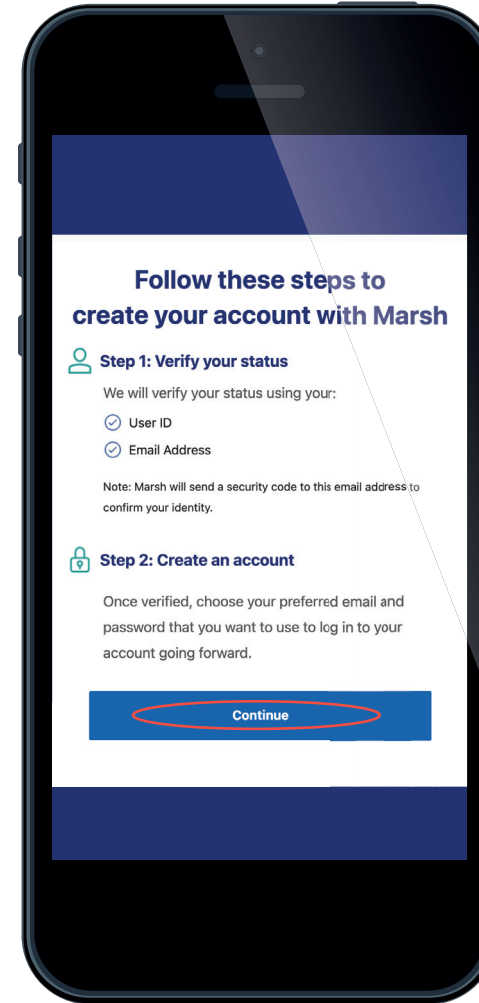
Step by Step user guide for obtaining  
Certificates of Insurance for your franchise

October 2024





1. Click the “Don't Have an Account? Create.” link to create an account on the Marsh Self-Service Portal.



2. Click the “Continue” button.

STEP 1 OF 2

### Verify your status

To begin, we'll verify your status as a Servpro Franchisee company using the information below.

User ID

This is the case-sensitive code provided to you via email from your company.

Email Address

This is the email address you have on file with Marsh.

By clicking Continue, I agree to the Marsh [Terms of Use](#) and [Privacy Policy](#).

[Continue](#)

[Already have an account? Log in](#)

3. Enter your User ID (This will be your parent franchise number) and the email address that Marsh has on file for
4. you (this will be the same email address that received this user guide).

STEP 1 OF 2

### Enter your case-sensitive security code

A case-sensitive security code has been sent to j...h@gmail.com.  
Don't delay! The code expires in ten minutes.

Security Code

[Continue](#)

[Didn't receive a code? Resend](#)

5. A case-sensitive security code will be sent to your email. Enter this code on this screen.

STEP 2 OF 2

### Create an account

Enter the preferred email address you would like to access and manage your account moving forward.

You can either enter the email you just confirmed in the last step or choose a different email address.

Preferred Login Email

First Name \*

Last Name \*

[Continue](#)

In the future, you will be able to invite employees to create their own accounts to manage insurance online.

6. Enter your preferred login email address, as well as your first and last name.

STEP 2 OF 2

### Set your password

Lastly, enter the password you would like to use.

Enter Password

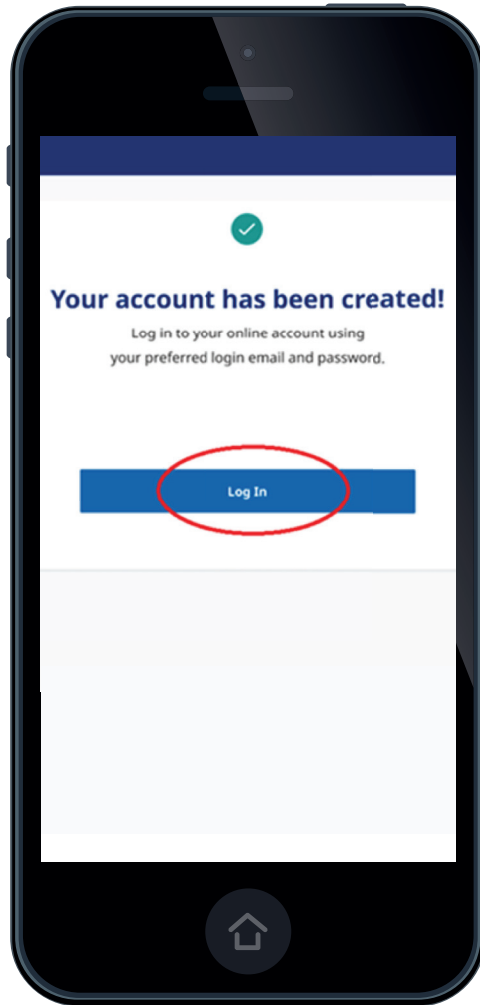
Re-enter Password

- At least one lowercase letter
- At least one uppercase letter
- At least one number
- At least one of these special characters !@#%&\*

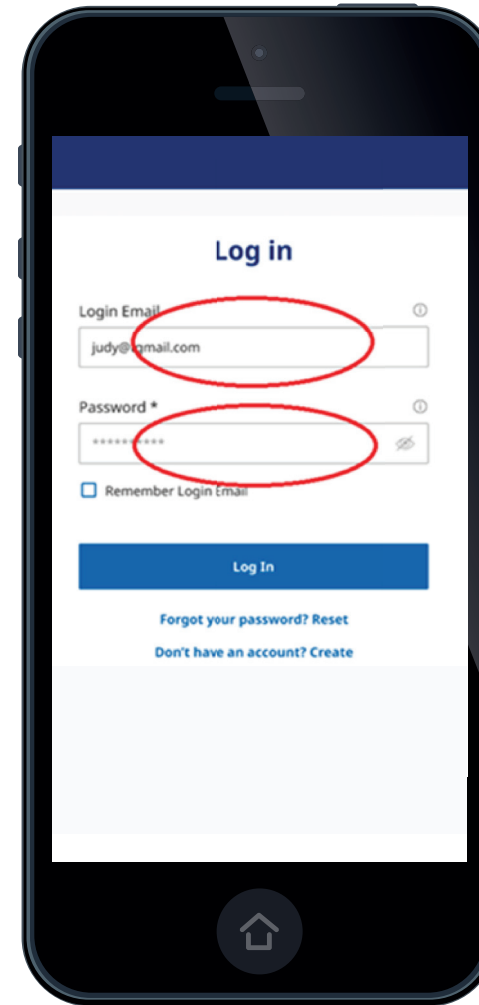
Cannot contain your first or last name, or part of your username.

[Create Account](#)

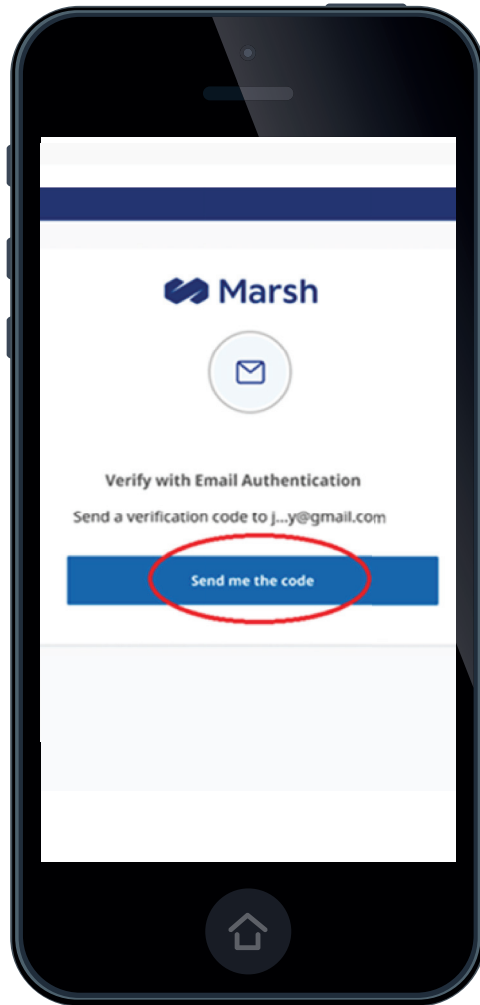
7. Create a strong password by following the password guidelines.



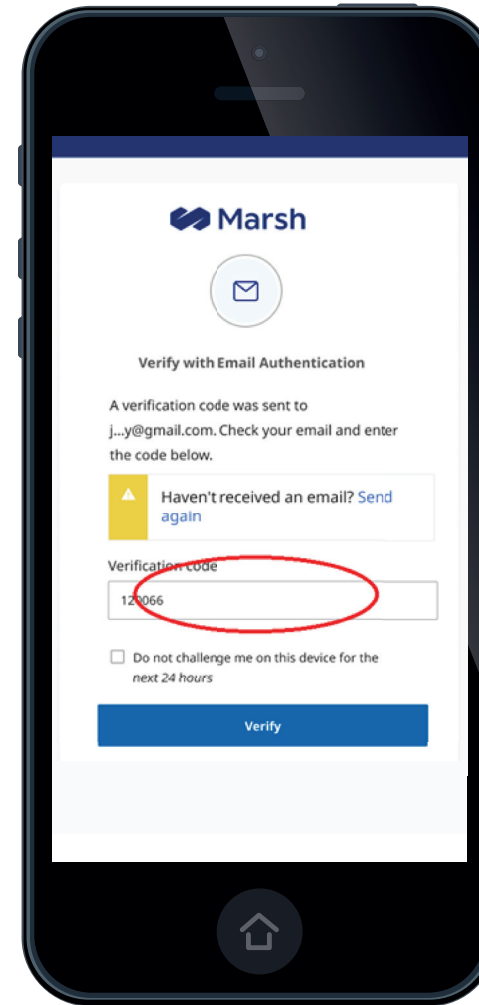
8. Congratulations! You've finished creating your account on the Marsh Self-Service Portal. Now click the "Log In" button to access the system.



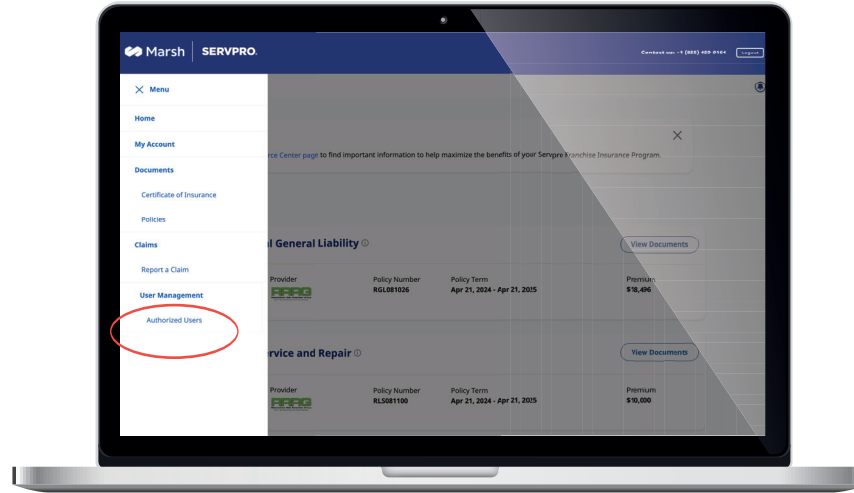
9. Enter your email address and password, then click the "Log In" button.



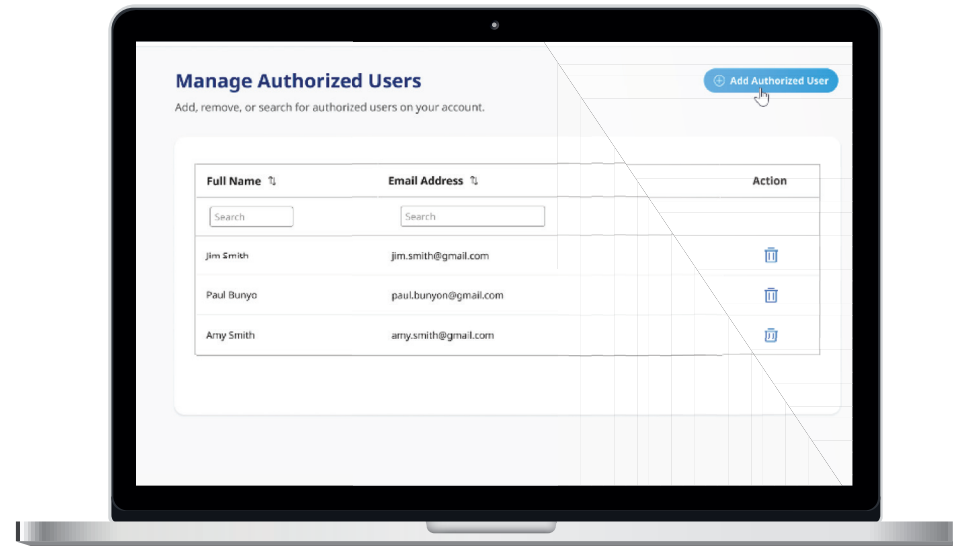
10. On your first login attempt, you will be asked to verify your email address again. You should receive an authentication email at the email address you provided.



11. Enter the verification code received via email.

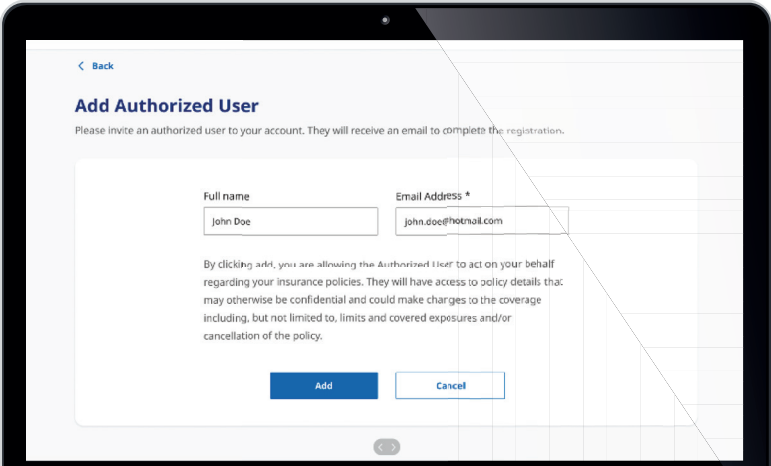


12. After you have created your account, please set up any authorized users that will be managing COIs on your behalf.



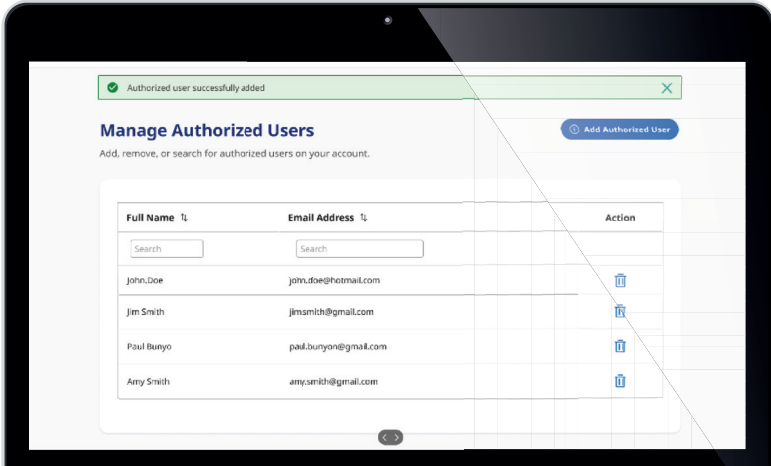
a. Add an Authorized Owner by clicking "Add Authorized User".

b. Enter Name and Email Address.



The screenshot shows a mobile device displaying the 'Add Authorized User' page. At the top left is a '< Back' link. The title is 'Add Authorized User' with a subtitle: 'Please invite an authorized user to your account. They will receive an email to complete the registration.' Below this are two input fields: 'Full name' containing 'John Doe' and 'Email Address \*' containing 'john.doe@hotmail.com'. A disclaimer text reads: 'By clicking add, you are allowing the Authorized User to act on your behalf regarding your insurance policies. They will have access to policy details that may otherwise be confidential and could make charges to the coverage including, but not limited to, limits and covered exposures and/or cancellation of the policy.' At the bottom are 'Add' and 'Cancel' buttons.

c. You should then see an "Authorized user successfully added" confirmation notice.



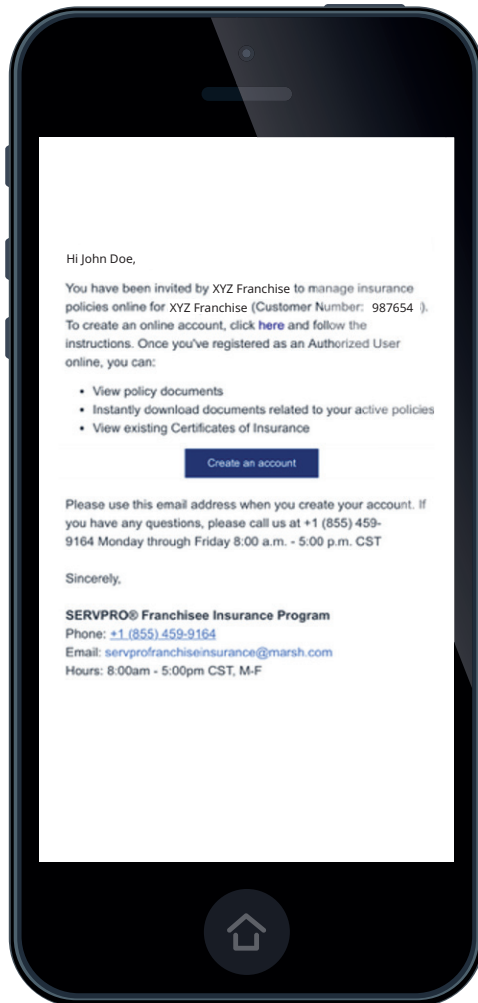
The screenshot shows a mobile device displaying the 'Manage Authorized Users' page. At the top is a green confirmation banner: 'Authorized user successfully added' with a close button. Below is the title 'Manage Authorized Users' and a subtitle: 'Add, remove, or search for authorized users on your account.' There is an 'Add Authorized User' button. Below is a table with columns 'Full Name', 'Email Address', and 'Action'. Each row has a search input field. The table contains four rows of user data, each with a trash icon in the 'Action' column.

Full Name	Email Address	Action
John Doe	john.doe@hotmail.com	[Search] [Trash]
Jim Smith	jimsmith@gmail.com	[Search] [Trash]
Paul Bunyo	paul.bunyo@gmail.com	[Search] [Trash]
Amy Smith	amysmith@gmail.com	[Search] [Trash]

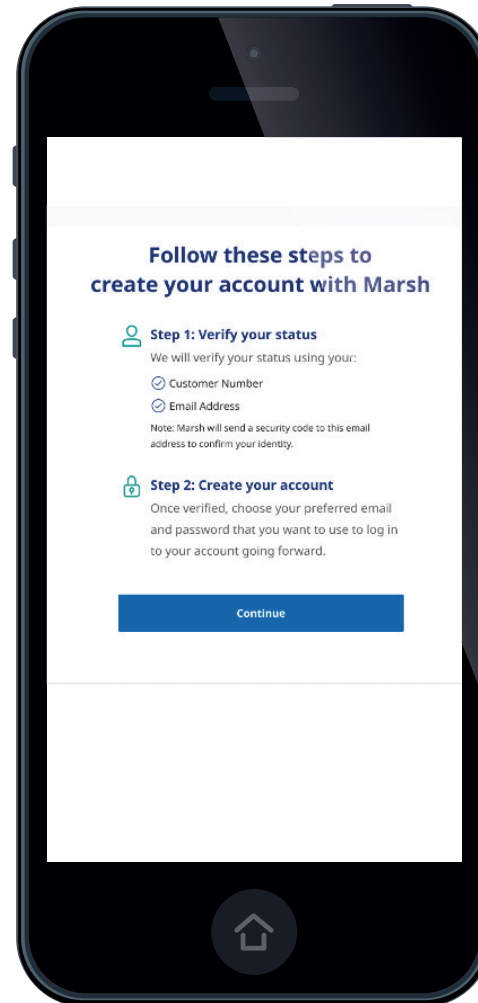


## Authorized Users

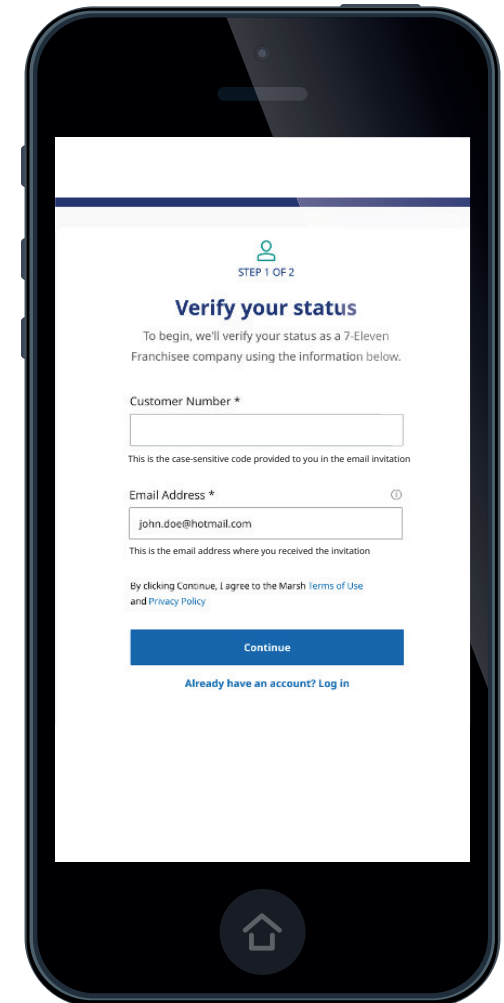
- d. The authorized user recipient will receive an email invitation providing a link to create an account and the customer number that should be used at setup.



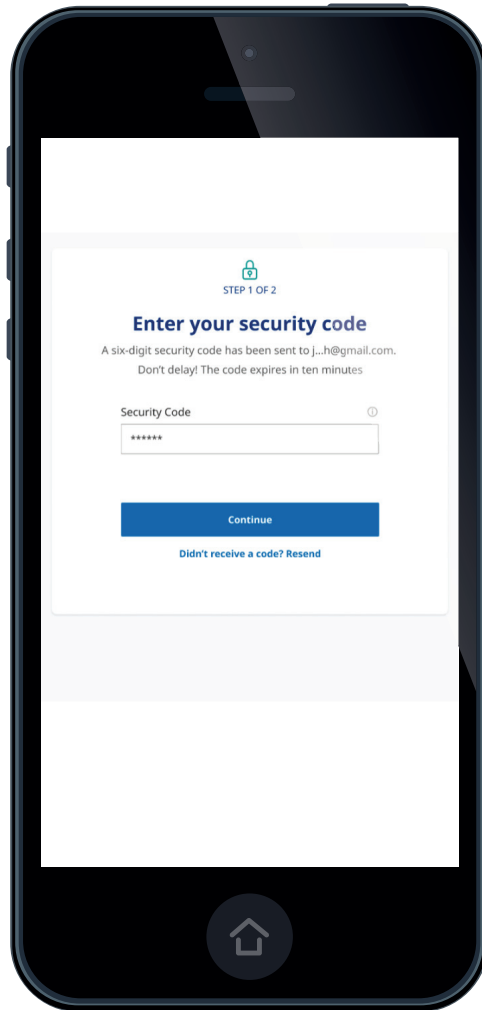
- e. Click continue.



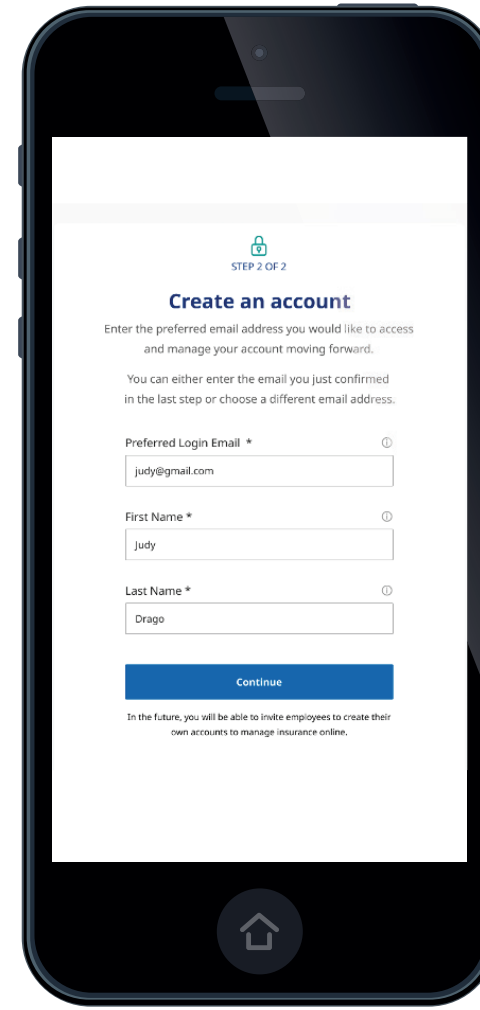
- f. Enter the customer number that was sent in the email invitation and the email address that received the invitation.



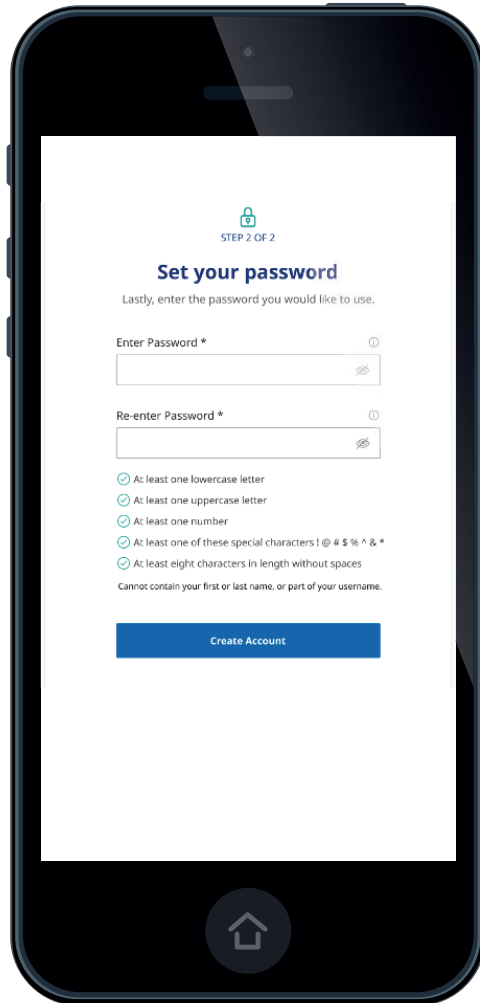
g. Enter security code sent to that email address.



h. To create an account, enter your preferred login and name.

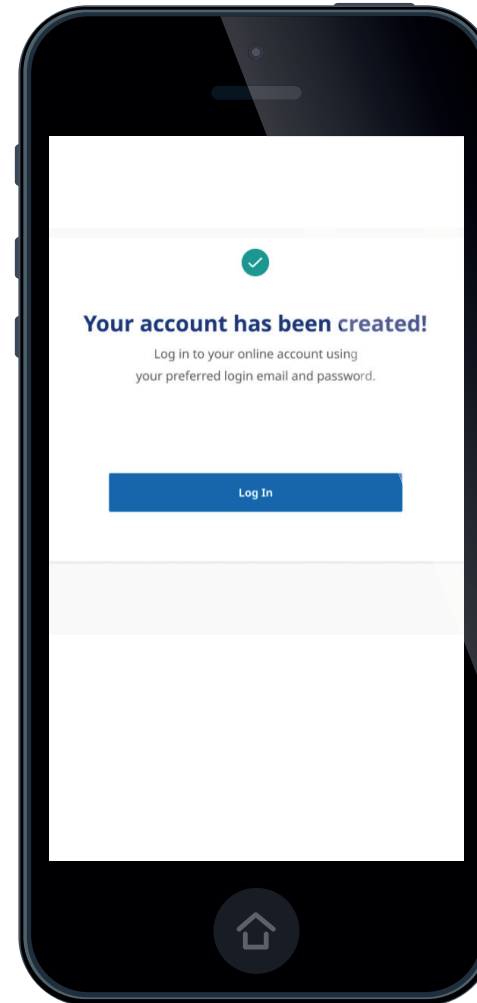


i. Enter your preferred password.



The smartphone screen displays the 'Set your password' step of account creation. At the top, there is a lock icon and the text 'STEP 2 OF 2'. Below this, the heading 'Set your password' is followed by the instruction 'Lastly, enter the password you would like to use.' There are two input fields: 'Enter Password \*' and 'Re-enter Password \*', each with a toggle icon to its right. Below the input fields, there are five password requirements, each with a green checkmark icon: 'At least one lowercase letter', 'At least one uppercase letter', 'At least one number', 'At least one of these special characters ! @ # \$ % ^ & \*', and 'At least eight characters in length without spaces'. A note below the requirements states 'Cannot contain your first or last name, or part of your username.' At the bottom of the screen is a blue button labeled 'Create Account'.

j. Your account has now been created!



The smartphone screen displays the confirmation message 'Your account has been created!' with a green checkmark icon above it. Below the message, it says 'Log in to your online account using your preferred login email and password.' There is a blue button labeled 'Log In' in the center of the screen.



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