

### Background

In October 2018 the Create Assignment Tool allowing Select Service® repairers to send their assignment was released on business to business portal. To date our Select Service® repairers have sent approximately 9,000 assignments using this self-service tool!

Your feedback has resulted in the following changes:

1. Created a new Select Service- Employee role giving access to the Create Assignment tool *only*
2. Simplified the validation inputs by removing customer phone number

Please review the information below of the details surrounding these enhancements

### Action requested- Adding new role for Select Service Employee

Select Service® repairers that have the Select Service role on B2B have access to Create an assignment in addition to other functionality like viewing RPM reports, submitting ARF surveys and other resources. Repairers requested access be granted to Create Assignment tool *only* so team members could perform this function without having access to other items outside of their responsibility.

Select Service- Employee is a new role that can be added to an existing B2B ID. In addition to updating roles for “Employees”, the admin can also add new users, reset passwords and resend registration invites to create a B2B ID.

1. Admin will log in to B2B: <https://b2b.statefarm.com/b2b/index.html>



B2B Login

B2B ID

Password

Forgot your [B2B ID](#) or [Password](#)?

Remember My B2B ID

2. Click on “User Admin” tab in the upper right hand corner of the screen.



Profile & Settings User Admin Log Out

Search B2B

3. Once you are on the B2B User Admin page, you can search for the specific employee by first and last name or by the B2B ID. Note: Zip code is not required but can help narrow your search.



User Admin

### State Farm B2B Support Co #1

Search Users Business Info User Reports

Last Name or User ID is required to search for a user.

Last name:

First name:

User ID:

ZIP or Postal code:

- After you complete the search you should see the results. Click on the full name of the user you want to update.

**User Admin**

State Farm B2B Support Co #1 Add a User

Search Users Business Info User Reports

Last Name or User ID is required to search for a user.

Last name:

First name:

User ID:

ZIP or Postal code:

Clear Search

Full Name	User ID	Telephone Number	E-mail Address	User Type	Status	ZIP / Postal Code
Sunshine, Susie	shinebright	(309) 333-4444	susie.sunshine@abcrepair.com	Non-Admin	Active	61701

- This will provide you with details of that B2B user. In order to add the new role click on the edit action.

**User Admin**

State Farm B2B Support Co #1 Add a User

Search Users Business Info User Reports

User Information Status: Active Edit Reset Password Disable User

First name: Susie

Middle Name or Initial:

Last name: Sunshine

- Scroll down to the Administrative Information Section to display the roles that are available for the individual B2B ID. Click on the Select Service- Employee role from the drop down and then click the Add button and Save Changes.

Administrative Information

User Type:  Non-Administrator  Administrator

Roles:  Add > < Remove

Status: Active

Enablement date: 09-16-2004

Registration date: 07-09-2006

Disablement date:


Cancel Save Changes

7. Once you save the changes you will receive a confirmation letting you know it was successful.



The screenshot shows a 'User Admin' interface. At the top, there is a red header with 'User Admin'. Below it, a section titled 'User Details Updated - State Farm B2B Support Co #1' includes an 'Add a User' button. A navigation bar contains 'Search Users', 'Business Info', and 'User Reports'. A yellow confirmation banner states 'User details successfully Updated.' with a green checkmark. Below the banner are 'Edit Again' and 'View User Details' buttons.

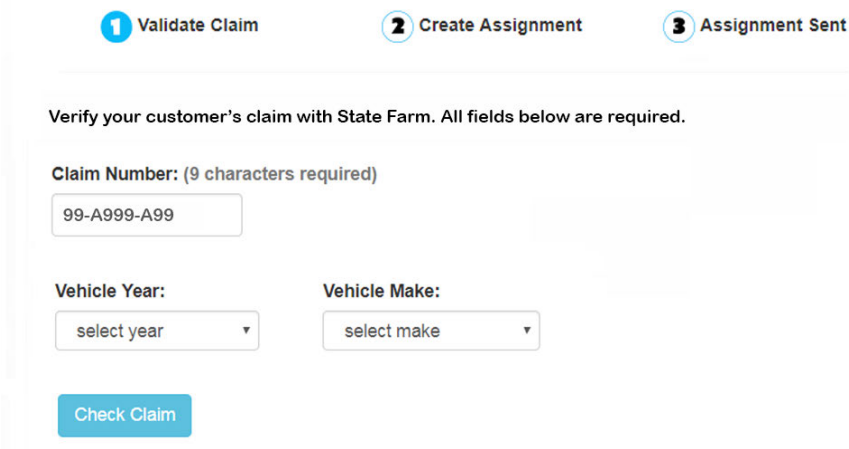
8. After granting the new Select Service- Employee role, the B2B user will see a link to Select Service- Employee in the right hand navigation.



The screenshot shows a user dashboard for 'Susie Sunshine'. The navigation menu includes 'EFT Forms', 'View Remittance', and 'Select Service - Employee', which is highlighted with a yellow box.

9. By clicking the Select Service- Employee role it will launch the Create Assignment tool only. Note this new role will not have access to the Select Service Dashboard (with Repairer Performance Management Reports, Repair Updates, ARF Survey, or Help & Support).

### Create Assignment



The screenshot shows the 'Create Assignment' tool interface. At the top, there are three steps: '1 Validate Claim', '2 Create Assignment', and '3 Assignment Sent'. The '1 Validate Claim' step is active. Below the steps, there is a message: 'Verify your customer's claim with State Farm. All fields below are required.' The form includes a 'Claim Number' field (9 characters required) with the value '99-A999-A99', a 'Vehicle Year' dropdown menu with 'select year', and a 'Vehicle Make' dropdown menu with 'select make'. A 'Check Claim' button is located at the bottom.

### Enhance Validation of Claim Inputs

This enhancement will allow claim verification without the customer phone number. You will also be provided with more detailed reasons on what information wasn't matching so you can make adjustments accordingly.

### Create Assignment

1 Validate Claim   2 Create Assignment   3 Assignment Sent

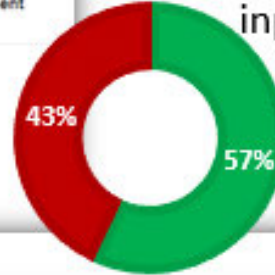
Verify your customer's claim with State Farm. All fields below are required.

Claim Number: (9 characters required)

Customer Phone Number:

Vehicle Year:    Vehicle Make:

**October 2018**



Only **57%** of inputs were matching ECS

### Create Assignment

1 Validate Claim   2 Create Assignment   3 Assignment Sent

Verify your customer's claim with State Farm. All fields below are required.

Claim Number: (9 characters required)

Vehicle Year:    Vehicle Make:

**New! March 2019**