

FormFire and Highmark



Quick Start Guide

How to Create an Agency in FormFire

1. Provide your main contact at the Agency with <https://www.formfire.com/admin/AgencySetup>.
2. Advise them to click the orange "Create Your Account" button at the bottom of the screen.
 - a. They will be asked to enter in the following items:
 - Agency Name
 - Tax ID
 - Street Address
 - City
 - State
 - Zip Code
 - Primary Contact Name
 - Contact Phone
 - Contact Email
 - Promo Code - **HIGHMARK**
 - b. Once done, the contact will be asked to create a username and password to use the FormFire site.
 - i. Going forward, the contact will log into www.formfire.com/admin.

How to add Additional Brokers to an Agency in FormFire

1. Your main contact will provide their colleagues with the Employer Code associated with their Agency in FormFire.
2. Once received, each user will create their account at www.formfire.com/admin.
3. Once the accounts are created, your main contact will provide the correct access level to the new Brokers.

For more information on this process, view our help article [How to add additional brokers to your agency](#).

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How to add a Group in FormFire

1. Log into your FormFire account at www.formfire.com/admin.
2. Go to your Client Dashboard.
 - a. A Group will be listed here; this Group will have the same name as your Agency and is called your Base Group.
 - i. This will hold all your Broker (Admin) accounts in the Employee List page.
3. Click the **+Add Client** button at the top of your screen (all items with a red asterisk are required).
 - a. Enter in basic information on your Group in Employer Information.
 - b. In Workflow Options set up the Employee experience.
 - c. Select the Account Manager/Producer/Agent of Record from your Agency, for this Group, as Team Member 1 under Broker Setup.
4. Click Save and your Group will be added into FormFire.

For more information on this process, view our help article [How to add a Client in FormFire](#).