How to Add a Company to Employee Navigator

Beere& Purves

Use these steps to add a company to your Employee Navigator account. B&P can assist with setup, but you'll first need to create the company and grant our team access.

1. Start from Your Brokerage Homepage

- Log in to Employee Navigator and land on your brokerage homepage.
- From the dashboard, click Add Company (+).

2. Choose How You Want to Create the Company

You will see several setup options:

- Create a company from scratch (used in this walkthrough)
- Copy a company from your library
- Copy an existing company

Select Create a company from scratch, then click Next.

3. Enter Company Details

On the Company Details screen, complete the following required fields:

- Company Name
- State
- SIC Code
- Unique Identifier (auto-generated but editable)

Demo Company? Check Is Demo Company.

4. Assign Access (Teams and/or Users)

- Assign the company to one or more Teams at your agency and/or
- Assign specific Users who should have access to the company

5. Create Company

- Review the information entered.
- Click Create Company.

Once created, Employee Navigator will open the company's Settings automatically.

(Optional) Give B&P Access to Build the Group

If you would like assistance with this group:

1. Go to Partner Invitations in Quick Links section on your broker homepage.
2. Click Invite Partner.
3. Select Beere&Purves as the supporting partner.
4. Select the company.
5. Click Save.

B&P will be notified and can proceed with the group setup from there.

Need help?

Contact Beere&Purves at onlineenrollment@beerepurves.com.