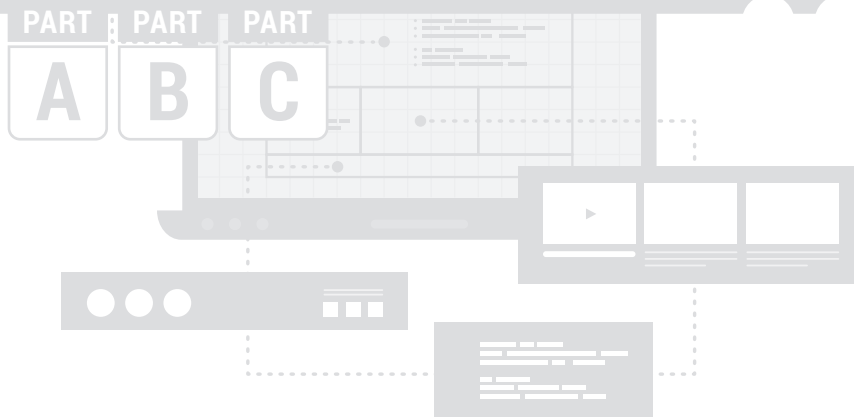


A GUIDE TO WORKING ONLINE WITH SIU



# HOW TO EDIT AGENCY INFORMATION AND E&O UPLOAD

SOUTHERN INSURANCE UNDERWRITERS, INC CMGA + 800.568.1700 + INFO@SIUINS.COM + SIUINS.COM



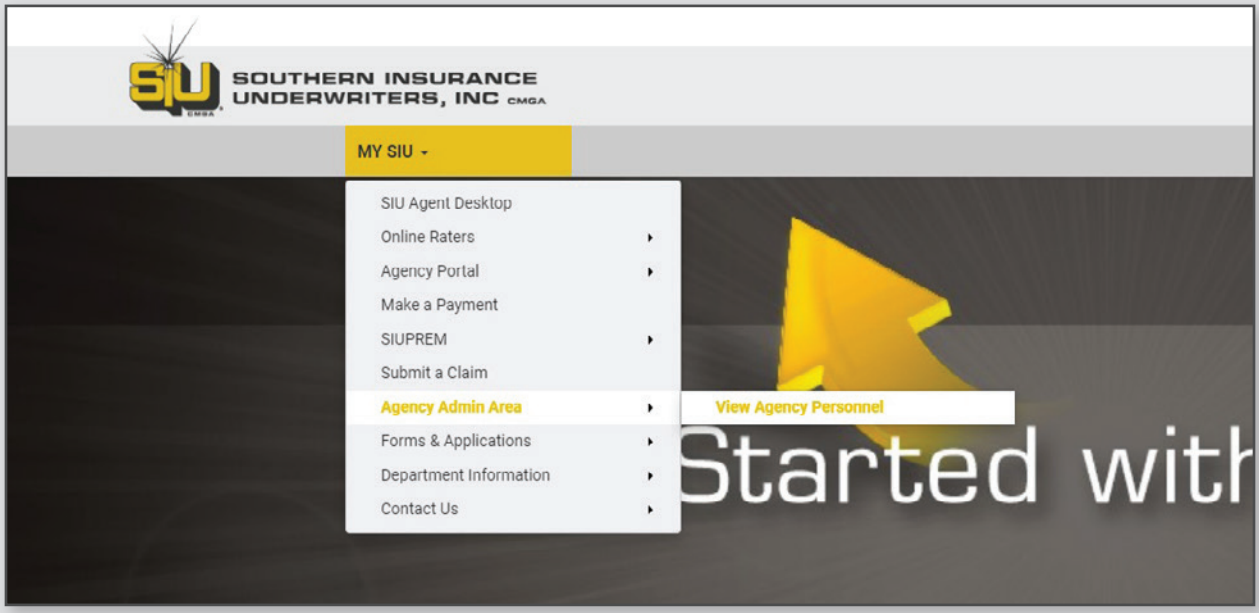


# EDITING AGENCY INFO AND E&O UPLOAD

**PART**  
**1**

**VIEWING CONTACTS**

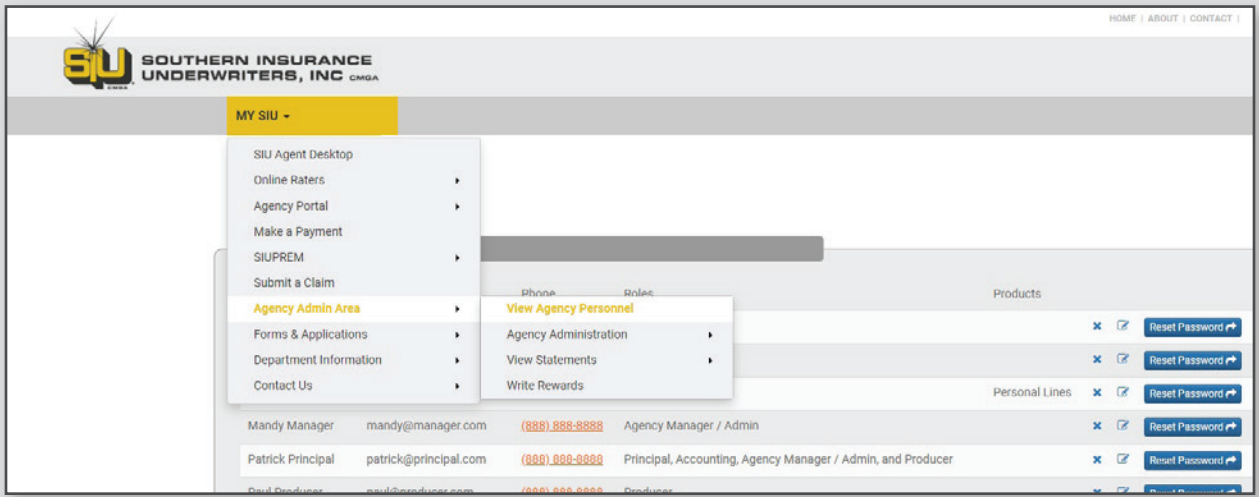
All agents have access to view agency contacts and roles. Only the agency manager and principle have rights to edit information, delete/create new contacts and reset passwords. Additional admin rights for the Manager and Principle include ability to access Accounting Statements and Write Rewards. Agencies can designate an Accounting role for additional staff to view statements and individuals can have multiple roles.



**PART**  
**2**

**ADDING & DELETING CONTACTS**

Go to the agency admin section and select view personnel. You will notice the buttons on the right will give you easy access to delete (X) or resent passwords with the click of a button. Select the icon in between to edit the contacts information or role.





# EDITING AGENCY INFO AND E&O UPLOAD

**PART**  
**3**

**EDITING THE CONTACT**

A \* indicates required information. You can select as many roles and products as needed. The roles define rights within siuins.com portal products will customize communication the contact receives. Remember to save contact changes by clicking on the save contact button.

First Name *	Abbey	Middle Initial	Middle Initial
Last Name *	Accountant	Nickname	Nickname
Suffix	Unknown	Email *	abbey@accountant.com
Phone *	(000) 000-0000	Extension	Extension
Password *	Abbey12!		

<b>Abbey Accountant's Role(s) Within Agency</b> <input type="checkbox"/> Principal <input type="checkbox"/> Producer <input type="checkbox"/> Agency Manager / Admin <input type="checkbox"/> Customer Service Rep <input checked="" type="checkbox"/> Accounting	<b>Products Written by Abbey Accountant</b> <input type="checkbox"/> Commercial Lines <input type="checkbox"/> Personal Lines <input type="checkbox"/> Transportation <input type="checkbox"/> Professional Lines <input type="checkbox"/> Other <input type="text"/>
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**PART**  
**4**

**CREATING NEW CONTACTS**

Contacts can be added individually or uploaded using an excel or csv file. If you choose to upload a template and sample template containing data have been provided. Red column headings on the template indicate the required fields.

Name	Email	Phone	Roles	Products	
Abbey Accountant	abbey@accountant.com	(888) 888-8888	Accounting		x [icon] <a href="#">Reset Password</a>
Casey CSR	casey@csr.com	(888) 888-8888	Producer		x [icon] <a href="#">Reset Password</a>
First M Last	a@email.com	(123) 456-7890	Producer	Personal Lines	x [icon] <a href="#">Reset Password</a>
Mandy Manager	mandy@manager.com	(888) 888-8888	Agency Manager / Admin		x [icon] <a href="#">Reset Password</a>
Patrick Principal	patrick@principal.com	(888) 888-8888	Principal, Accounting, Agency Manager / Admin, and Producer		x [icon] <a href="#">Reset Password</a>
Paul Producer	paul@producer.com	(888) 888-8888	Producer		x [icon] <a href="#">Reset Password</a>

[Add Contact\(s\)](#)
[Upload File With All Of Your Contacts](#)

Upload File With All Of Your Contacts

[Select / Upload Completed Template File](#)  
[Download template](#)  
[Download Prepopulated Sample Template](#)

Drop files here



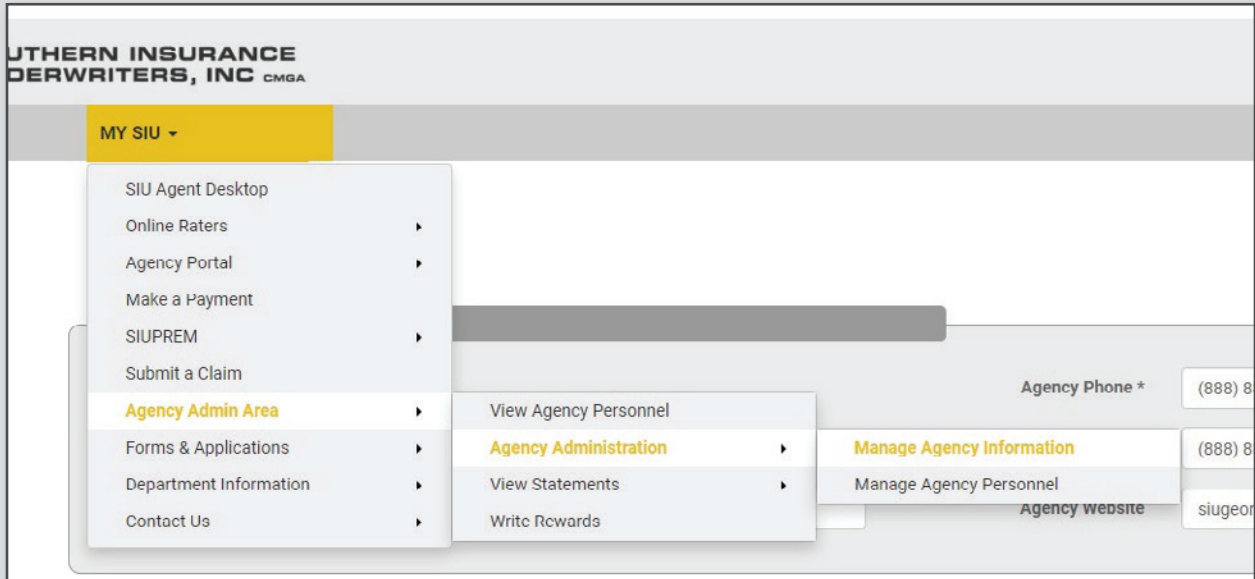
# EDITING AGENCY INFO AND E&O UPLOAD

PART

5

## MANAGING AGENCY INFO

SIU provides you with the ability to edit agency information (\* indicates a required field, policy delivery and accounting emails and upload current E&O document. We have provided an option to upload your agency logo. As we continue to develop the siuins.com portal, we will make customized marketing material available for download.



PART

6

## UPLOADING E&O DOCUMENT

Enter the carrier name, policy number and date. Select the button to upload your E&O document. It will allow you to choose the file from the saved location on your desktop.

