

# SuranceBay Online Contracting Instructions

## Login & Profile Creation

1. [Click Here](#) to go to SureLC
2. To create a new profile, select **REGISTER NEW ACCOUNT** > input requested information > select **CREATE YOUR ACCOUNT**. Existing users (active online contracting profile through ECA Marketing), login with email and password.

3. Review existing data and documents for accuracy in the **NAVIGATION MENU**. Add/update missing data and documents (highlighted in red). When all red dots and highlights have been removed, your profile is complete, and you can move forward with the carrier **CONTRACTING REQUESTS** and **CONFIRMATIONS**.

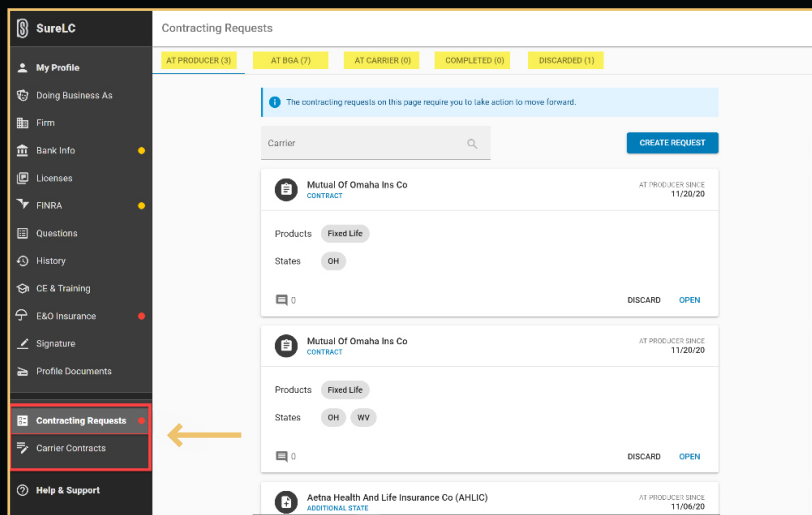
*Recommendation:* SuranceBay can obtain CE Transcripts and AML Training from select vendors.

To link the accounts, go to the **CE & TRAINING** tab > select **ADD NEW ACCOUNTS** > Choose CE vendor > input your username and password associated with the CE vendor account.

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## Contracting Requests and Confirmations

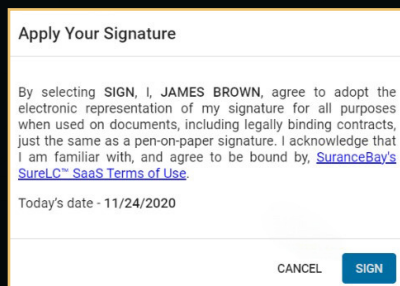
1. From the **NAVIGATION MENU** select **CONTRACTING REQUESTS > CREATE REQUEST**, select carrier name from dropdown menu > input **REQUEST TYPE** (contract or transfer) > choose **STATES & PRODUCTS** > verify information in **TRAINING CONCIERGE** > verify **E&O POLICY** > answer **CARRIER QUESTIONS**



2. The contract will populate, read/scroll to the bottom of the document > select **APPLY MY SIGNATURE** (located in the bottom right corner, selection will be highlighted in blue when ready – if blue highlight disappears, scroll up and then back down again)



3. **APPLY YOUR SIGNATURE** popup will appear > select **SIGN**



4. ECA Marketing will be notified of the contract request

7800 Equitable Drive, Suite 230 Eden Prairie, MN 55344  
(800) 356-4189  
licensing@ecamarketing.com



## Complete The Onboarding Process

Click the Button Below Schedule a Quick Call

*Fixed Annuities*

*Life Insurance*

## Have Any Questions?

*Fixed Annuities*

*Life Insurance*



**Yuriy Malashenko**

yuriy@ecamarketing.com  
(800) 356-4189 ext. 2230



**Seth Wright**

seth@ecamarketing.com  
(800) 356-4189 ext. 2247

## Policy Status

*HQ View*

[Click Here To Login To HQ View](#)

*Need an account? Please reach out to Yuriy or Seth*