



# SuranceBay Online Contracting Instructions

The Agency IMO – Daniel Simon

## LOGIN and PROFILE CREATION :

1. Go to <https://surelc.surancebay.com/sbweb/login.jsp?branchEditable=off&branchRequired=off&branch=The%20Agency%20IMO%20-%20Daniel%20Simon&branchVisible=on&cc=contact%40theagencyimo.com&gald=27&gaName=ECA%20Marketing>
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.

Sign In  
Provide the information below to verify your identity.

Email

Password

RECOVER PASSWORD LOGIN

REGISTER NEW ACCOUNT

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.

SureLC My Profile > Producer Info

My Profile

Doing Business As

Bank Info

Licenses

FINRA

Questions

History

CE & Training

F&O Insurance

Signature

Profile Documents

Contracting Requests

Carrier Contracts

Help & Support

Navigation Menu

Full Name

Mr JAMES A BROWN Jr.

Personal Information

Male Single

Contact information

Driver's License

Address information

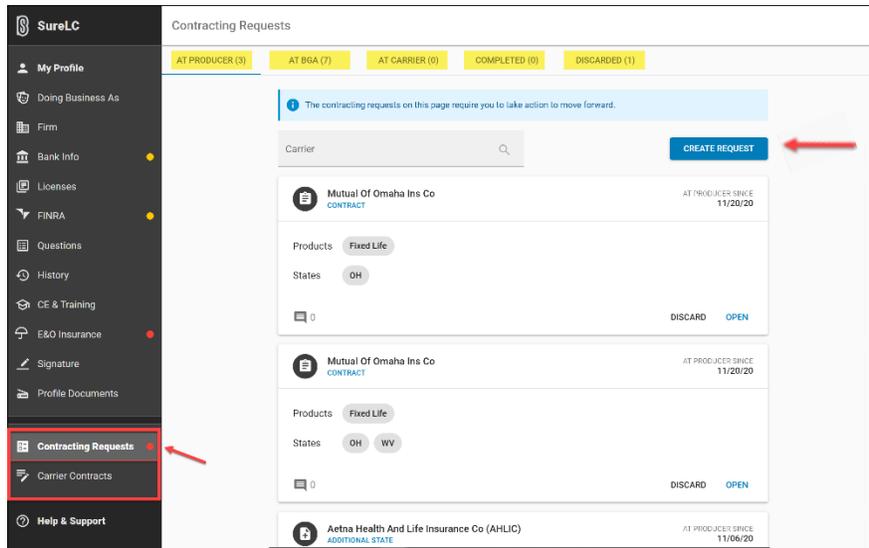
*Recommendation:* SuranceBay can obtain CE Transcripts and AML Training from select vendors.

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

ECA agent use only – not for public distribution

## 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)

APPLY MY SIGNATURE

3. APPLY YOUR SIGNATURE popup will appear > select SIGN

### Apply Your Signature

By selecting SIGN, I, JAMES BROWN, agree to adopt the electronic representation of my signature for all purposes when used on documents, including legally binding contracts, just the same as a pen-on-paper signature. I acknowledge that I am familiar with, and agree to be bound by, [SureLC™ SaaS Terms of Use](#).

Today's date - 11/24/2020

CANCEL SIGN

4. ECA Marketing will be notified of the contract request

ECA Marketing, Inc.  
7800 Equitable Drive, Suite 230  
Eden Prairie, MN 55344  
(800) 356-4189  
[licensing@ecamarketing.com](mailto:licensing@ecamarketing.com)