

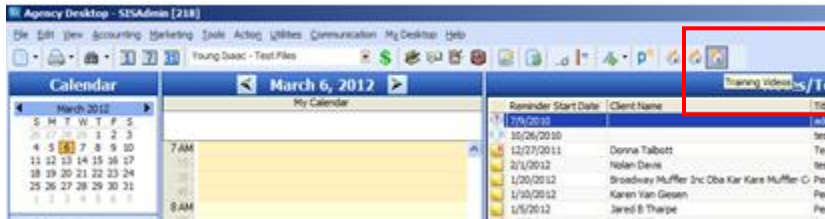
## ACCESS ONLINE TRAINING

### Methods to access online training

1) Go to: <http://training.partnerxe.com> (shown below) or

2) From Partner XE

Click on toolbar shortcut



3) From Partner XE

Help > Release Information > Online Training (tab) > [click here](#)

**Sign in for Training!**

Is your Agency not activated? Call 1-800-747-7005 to activate your Agency.

Account Name:

User ID:

Password:

**Sign In**

**INTRODUCING Partner XE On-Line Training**

Partner XE™, developed by SIS, is a NEW full-featured agency management system. Designed to use the latest technology and incorporating up-to-date agency workflows, Partner XE fulfills your current expectations.

With Partner XE, SIS continues the tradition of excellence in software, service and training. Built on "award-winning" technology, priced affordably, and backed by an experienced service staff that is there when you need them.

Top five features of Partner XE:

- Client Data Management - Manage your clients and policies via download. Organize your activities around Partner XE's Calendar, Notes and To-Do-Lists.
- Connectivity with your Carriers – Real-Time connectivity to your carriers' Websites for client inquiry.
- Hosting Option – Enjoy secure remote connectivity to your agency data and let SIS handle the updates, backups and security.
- Integrated Accounting (optional module) – Robust and fully integrated accounting module designed specifically to service the independent agent. Supports direct bill commission download, agency-bill and direct-bill clients, company accounts, agency receivables and payables, month and year-end closings, and detailed reports.
- Doc Box™ – Document management module for storage and retrieval of scanned documents, digital pictures, and other files allowing for a true paperless workflow environment. You can scan multiple items into the Inbox and then go back and assign items to the appropriate Client or Policy at a later time and in more than one place.

The benefits of choosing Partner XE for your agency include:

- Scalable system that grows with you
- Flexible technology that allows you to choose the workflow that fits your needs

Account Name: In order to log into training, you'll need your Account Name. If someone in your office does not have this, please contact [service@sisware.com](mailto:service@sisware.com). User ID and Password are the same as your log in for Partner XE.

Strategic Insurance Software, Inc. HOME AE

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Account Name: To log into training, you'll need your Account Name. This is your agency name as it appears in Partner XE on the desktop.

User ID and Password are the same as your log in for Partner XE. If you do not have one, the Partner XE administrator at your agency can create one.

Agency Desktop - SISAdmin [218]

File Edit View Accounting Marketing Tools Action Utilities Communication My Desktop Help

The Bryce Lee Agency

December 22, 2011

Reminder Start Date	Client Name
12/22/2010 3:00:00 PM	
9/2/2010	
9/2/2010	
4/26/2011	Jessalyn Marie Starkey c
3/30/2011	Jeff & Andrea Smith
9/1/2010	SIS
8/31/2010	Jessalyn Marie Starkey c
7/13/2010	B&S Construction
6/22/2010	Jessalyn Marie Starkey c
6/12/2010	Steve & Rhonda Hill
6/12/2010	Interior Specialists
6/12/2010	John and Sally Martin
6/12/2010	Bart Oakley
6/12/2010	Interior Specialists

