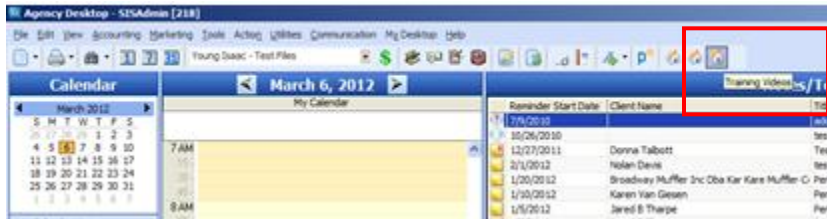



## ACCESS ONLINE TRAINING

### 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](#)




Get in touch 800.747.7005

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**Partner<sup>XE</sup> by SIS On-Line Training**

**Sign in for Training!**

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

Account Name

User ID

Password

Welcome to Partner XE™ online training!

Partner XE™ training is provided in two formats: video training and test database. The videos demonstrate the functions and features of the system in easy-to-follow steps (accessed by logging in here). The test database is a fully-functional, latest version representation of a Partner XE™ database to be used for practice and review as you learn each area from the videos (accessed by shortcut on workstation desktop).

It is highly recommended that time be allotted daily to this training at least 2-3 weeks prior to installation of your Partner XE™ production database. Agencies that focus on training prior to "go live" will have a smoother transition to the new system.

Access to the test database and training videos is set up on your workstation by an SIS representative or your office administrator. To log in, click on the Partner XE™ shortcut on your desktop and enter your login information.

Agency Name (for training videos): Exactly as it appears in the test database (include "-Test Files" with a space after your agency name and before the "-")

User ID: first\_name

Password: last\_name (all lower case)

In addition, all Partner XE™ users should register for PartnerNet - [www.partnerxe.net/register](http://www.partnerxe.net/register). This online resource provides critical information including frequently asked questions (FAQs), a knowledge base, webinars, and other resources. PartnerNet provides immediate and up-to-date answers to your questions in an easy-to-follow format.

For instructions to add an additional employee to the training system, click on the link below:

**NOTE: You must have administrator permissions to add a user.**

<http://www.partnerxe.net/wp-content/uploads/2012/03/How-to-add-a-user-to-the-test-database.pdf>

We are excited that you have chosen Partner XE™ as your agency management system. We are looking forward to working with you.

The SIS Team

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.

**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**

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.

