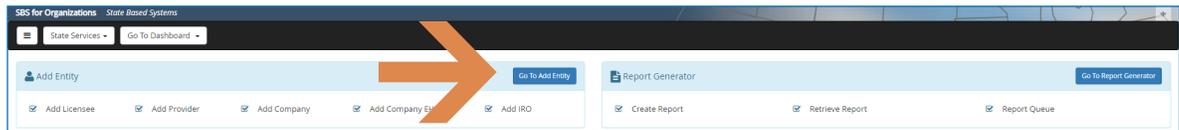




➔ HOW DO I: ADD A LICENSEE ENTITY TO MY ACCOUNT?

- 1 Click the 'Go to Add Entity' button from your SBS for Organizations Home Page



- 2 Select 'Licensee' from the Type drop down and input required fields

Complete either the left column of fields or the right column of fields. Click 'Add to Cart.' Add multiple licensees to your cart if you wish to upload several entities at one time. Click 'Next.'

➔ NEED HELP? CONTACT THE SBS HELP DESK • SBSHELP@NAIC.ORG • 816-783-8990



3 Add payment information

Complete payment details. The fee for adding licensees to your account is \$5.95 per licensee, per jurisdiction, per year. Click 'Next.'

State Based Systems

State Services - Go To Dashboard -

1 Application / 2 Review / 3 Payment Details / 4 Process Payment / 5 Receipt

Payment Details

* Card Holder First Name:

* Card Holder Last Name:

* Billing Street Name:

* Billing City:

* Billing State:

* Billing Country:

* Billing ZIP Code:

* E-mail:

* Amount: \$5.95

* Phone Number:

Previous Next Finish Cancel

4 Preview receipt screen

The receipt screen provides payment confirmation and a summary of the transaction including a transaction number for future reference. Once 'Finish' is selected, the user is taken to their Licensee Dashboard where you can see the licensees just added to the account.

State Based Systems

State Services - Go To Dashboard -

1 Application / 2 Review / 3 Payment Details / 4 Process Payment / 5 Receipt

⚠ This action will add the new entities you selected to your Managed account, click "Finish" to continue or click "Cancel" to return to the home page.

📌 Your Transaction Number is: 6923990644 Total Transaction Fees Paid: \$5.95 Transaction Date: 01/08/2016

Billing Information

Name: Example Name	Payment Method: AUTHORIZATION	Amount: \$5.95
Address: 1100 Walnut Street Kansas City, Missouri, 64108	Authorization Number: 6923990644	Payment Transaction ID: 6923990644
Transaction Type: Add Entity	Transaction Date: 01/08/2016	Phone Number: 816-783-8990

License			
Jurisdiction	NPN	FEIN	Licensee Name
Delaware			Example Name

Grand Total: \$5.95

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