# ACH <u>Commission</u> Payments

#### on www.ciusolutions.com

All direct bill commissions will be deposited electronically (ACH) to the agency's operating bank account. This quick reference will review how to set up your bank account information.

### Feature

Setting up Agency's Operating Bank Account for Commission Payments Amending Operating Bank Account Information for Commission Payments

## Setting Up Agency's Operating Bank Account For Commission Payments



Log in to the website at www.ciusolutions.com using your userid & password. Your userid is your email address. If you have forgotten your password, you can click the Forgot your password? link (after clicking Broker Login) to reset it.

See page #

1

2

IMPORTANT—only the agency administrator will be able to set the bank account information. If you are not sure who the agency administrator is you can click **REQUEST A LOGIN** to find out who your agency administrator is.

| From the main menu, click on FINANCE, and then click on Agency |   | HOME PRODUCTS<br>essages () View All Messages   | MY PROFILE | FINANCE SEARCH Q&A<br>Agency Bill Outstanding Balance<br>Apency Bill Perment History | LAIMS UNDERWRITING GU                         | WELCOME TEST USER (CR)<br>UIDELINES ONLINE TRAINING<br>All Agents • |
|--|---|---|------------|--|---|---|
| <u>Commission</u> ACH Profile.                                 | Agent   | Policy Number   | Named I    | Agency Premium ACH Profile<br>Agency Commission ACH Profile                          | 15  | Created Date  |
| If you need to access the actual                               |   | ночкар  |            |  |   |   |
| commission statement, it is available                          | Specialty à la  | Carte Homeowners Coverages™<br>★ Quote Now ★  | A Ac       | tions Required - View De   | tails   |   |
| by clicking Commission Statements                              | <ul> <li>Personal A<br/>Silverware</li> <li>1-4 Family</li> </ul>   | uticles Floater (Scheduled Jewelry, Firearms,<br>, etc.)<br>Dwelling Liability, Individually Owned  | 🖄 Inv      | valid Email Addresses – Viev   | v Details                                     |   |
| Available—View Details.  | <ul> <li>1-4 Family</li> <li>Vacant Lar</li> <li>Excess Pe</li> <li>Animal Lia</li> <li>Home Bas</li> <li>Blanket Tr</li> </ul> | Dwelling Liability, Trust/LLC/Corp. Owned<br>nd<br>rsonal Liability<br>bility (Domestic Cat, Dog, Bird)<br>bility (Domestic Cat, Dog, Bird)<br>ed Business Insurance Package<br>tel for Jeveley Flerarms Silvenyare | X Ag       | gency Billed Policies Balance<br>Policies At Risk of Cancellati                      | e Due – View Details<br>on Due To Non-Payment |   |
|  | Condomin     Pool Enclo     hail)   | ium Loss Assessment Coverage<br>isures & Other Structures (excluding wind and   | Latest N   | ommission Statements Availa  | able - View Details                           |   |



Ouick Reference—

# ACH <u>Commission</u> Payments COASTAL

#### on www.ciusolutions.com



| Click Add New Profile.                    | Insurance Underwriters were products my profile finance search Q&A CL  | AIMS UNDERWRITING GUIDELINES   |
|---|--|--|
|   | Outstanding Balance Payment History Premium Payment ACH Profile Commission Disburse  | ement ACH Profile  |
|   | Payment Profile  |  |
|   | Below profile will be used to process Agency Commission ACH payments   |  |
|   | Account Holder Routing Number Account Number   | Created By Create Dat  |
| Add New Profile                           | Add New Profile  |  |
| Account Holder First Name:                |  |  |
|   |  |  |
| Account Holder Last Name:                 | We consider the 2020 Coastal Insurance Underwriters, Inc. All rights reserved  | Privacy Po   |
| Account Holder Last Name:                 | Enter the requested information for the agency's operating bank account and o  | Privacy Po<br>Ne<br>Click  |
| Account Holder Last Name:                 | Enter the requested information for the agency's <u>operating</u> bank account and c<br>Save.  | Privacy Po<br>Ne<br>Click  |
| Account Holder Last Name:                 | Enter the requested information for the agency's <u>operating</u> bank account and c<br>Save.  | Privacy Po<br>De<br>Click  |
| Account Holder Last Name:                 | Enter the requested information for the agency's <u>operating</u> bank account and o <b>Save</b> .   | Privacy Po<br>De<br>Click<br>Welcome test user (cnu test age                                   |
| Account Number:                           | Enter the requested information for the agency's <u>operating</u> bank account and o <b>Save</b> .   | Privacy Po<br>DE<br>Click<br>WELCOME TEST USER (CUI TEST AGE<br>GUIDELINES ONLINE TRAINING ABO |
| Account Nober Fish Name:                  | Enter the requested information for the<br>agency's <u>operating</u> bank account and c<br>Save.<br>HOME PRODUCTS MY PROFILE FINANCE SEARCH Q&A CLAIMS UNDERWRITING<br>Payment History Premium Payment ACH Profile Commission Disbursement ACH Profile   | Privacy Po<br>Click<br>WELCOME TEST USER (CUI TEST AGE<br>GUIDELINES ONLINE TRAINING AGE       |
| Account Number:                           | Save         Close         Payment History         Premium Payment ACH Profile         Commission Disbursement ACH Profile   | Privacy Po<br>DE<br>Click<br>WELCOME TEST USER (CUI TEST AGE<br>GUIDELINES ONLINE TRAINING ABO |
| Account Number:                           | Enter the requested information for the<br>agency's <u>operating</u> bank account and c<br>Save.<br>HOME PRODUCTS MY PROFILE FINANCE SEARCH Q&A CLAIMS UNDERWRITING<br>Payment History Premium Payment ACH Profile Commission Disbursement ACH Profile<br>saved  | Privacy Po<br>Chick<br>WELCOME TEST USER (CUI TEST AGE<br>GUIDELINES ONLINE TRAINING AGE       |
| e screen will reset and                   | Save         Close         Payment History         Premium Payment ACH Profile         Commission Disbursement ACH Profile         Payment Profile         Below profile will be used to process Agency Commission ACH payments  | Privacy Po<br>De<br>Click<br>WELCOME TEST USER (CUI TEST AGE                                   |
| e screen will reset and<br>u will see the | All countered 69 2020 Coastal Insurance Underwriters, Inc. All rights reserved         Enter the requested information for the agency's <u>operating</u> bank account and constructions.         Save.         HOME       PRODUCTS         MY PROFILE       FINANCE         Save.         HOME       PRODUCTS         MY PROFILE       FINANCE         Save.         HOME       PRODUCTS         MY PROFILE       FINANCE         Save.         Payment History       Premium Payment ACH Profile         Commission Disbursement ACH Profile         saved         Payment Profile         Below profile will be used to process Agency Commission ACH payments         Account Holder       Routing Number         Account Number       Created By | Privacy Po<br>Click<br>WELCOME TEST USER (CUI TEST AGE<br>GUIDELINES ONLINE TRAINING ABO       |

# Amending Operating Bank Account Information for Commission Payments



Click Delete and the enter the new bank account information as per the above instructions.

March 24, 2020