

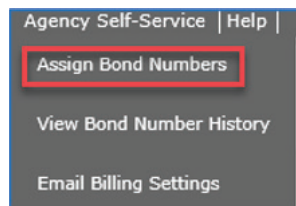
Bond number assignment and reconciliation guide

The Zurich Surety Express bond number assignment and reconciliation enhancement allows users to:

1. Obtain new bond number blocks
2. View history of bond number usage

Bond Number Assignment

Under "Agency Self-Service," click "Assign Bond Numbers."



Your agency information will appear.

Agency code*	0000011
Agency name	SURETY TEST PRODUCER
Agency address	600 RED BROOK BLVD OWINGS MILLS, MD 21117-5192

Select the quantity of bond numbers needed.

Enter the email address for the recipient. Please verify spelling so it will be sent to the correct individual.

Number of bond numbers requested*	50	←
Email	<input type="text"/>	
		→ Assign Bond Numbers

A message will appear confirming the bond numbers were sent.

The email will contain the new block of numbers, formatted in Excel, along with a cover letter. The block can also be downloaded from this screen.

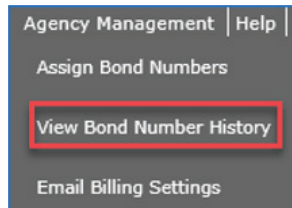
Generated	Bond Numbers
10/06/2020	→ Download

The new block will be accompanied by a cover letter that will identify any bond numbers from prior blocks that have not yet been booked.



Bond Number History

Under "Agency Management," click on "View Bond Number History."



Your agency information will appear. Enter the date range desired. Use the box to exclude numbers that have been removed. Click "Submit."

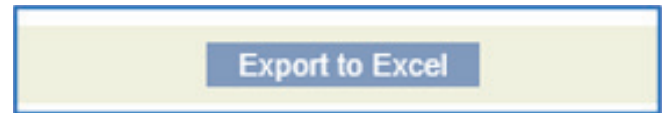


A screenshot of a form with the following fields: Agency code* (0000011), Agency name (SURETY TEST PRODUCER), Agency address (600 RED BROOK BLVD, OWINGS MILLS, MD 21117-5192), a checked checkbox for 'Exclude bonds removed from reconciliation', and a Date range field with MM/DD/YYYY format and calendar icons. A red arrow points to a 'Submit' button.

The number register will appear showing available and used bond numbers.

Bond Number	Date Assigned	Bond Issued	Detail
9365051	08/19/2020	08/20/2020	Principal Name

The register can be exported by clicking "Export to Excel" above or below the register.



Zurich

1299 Zurich Way, Schaumburg, IL 60196-1056
800 382 2150 www.zurichna.com

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