

Indio: Insurance Digital Forms an x +

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## The modern solution for the application and renewal process

Indio simplifies the insurance application process for brokers and their clients. We make it fast and easy, saving your agency time, money, and E&O exposure.

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Friday, May 29, 2020

The screenshot shows a modal dialog titled "Edit Permissions for Stanley Waters Profile" with a close button (X) in the top right corner. The dialog is divided into two main sections: "Client Portal Details" and "Permissions".

**Client Portal Details:** This section includes a "URL" field containing "https://docs.google.com/spread...". Below the URL field is a blue link labeled "COPY SHAREABLE LINK".

**Permissions:** This section lists four users with their email addresses and associated actions:

- Georgie Blake** (Primary Account): boyer.jess@rath.us. Action: PRIMARY ACCOUNT (with trash icon).
- Nathaniel Stokes**: brice\_ernser@wehner.us. Action: SEND LINK (with trash icon).
- Rosie Sanchez**: boehm.markus@lea.biz. Action: SEND LINK (with trash icon).
- Derrick Christensen**: greg\_torphy@jessy.name. Action: SEND LINK (with trash icon).

Below the list is an "Add Another User" section with the following form elements:

- A text input field with the placeholder "Provide a valid email".
- Two text input fields for "First Name" and "Last Name".
- A checked checkbox labeled "Send Welcome Email".
- A green "Add" button.

At the bottom right of the dialog is a large green "Save" button.

The background shows a blurred view of the Indio interface, including a sidebar with "Back to Client List", "Activity", and "Bundles" sections, and a main content area with a client profile for "Ramse".

**i indio** AG 5 NEW UPDATES Save Changes

[Back](#) BROKER ONLY SHARED 2017 Schedule - Renewal Workbook Version v12.00/00/00 Workbook Actions

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GROUP SETTINGS UPLOAD TABLE DATA DOWNLOAD TABLE DATA

Loc. #	Class Code	Description of Operations	# of Employpess	Last Years Payroll	Last Years Payroll
1	51942	Computer Software Mfg. - Pre Packaged	4	\$340.000	\$425.000
1	51942	Computer Software Mfg. - Pre Packaged	4	\$340.000	\$425.000
1	51942	Computer Software Mfg. - Pre Packaged	4	\$340.000	\$425.000
1	51942	Computer Software Mfg. - Pre Packaged	4	\$340.000	\$425.000
1	51942	Computer Software Mfg. - Pre Packaged	4	\$340.000	\$425.000
1	51942	Computer Software Mfg. - Pre Packaged	4	\$340.000	\$425.000

[+ Add Another](#)