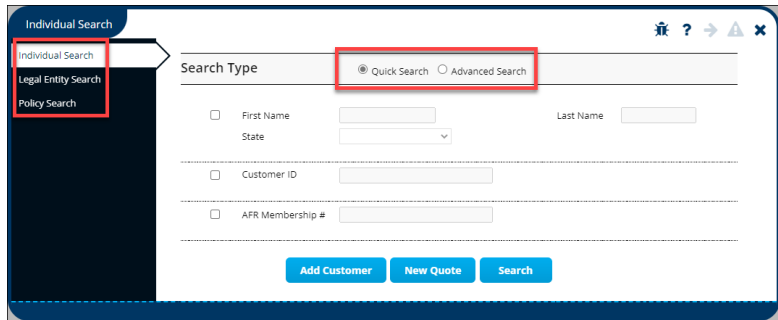
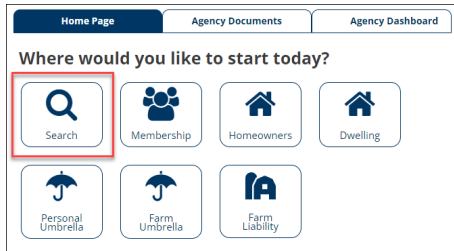


SEARCHING FOR AN EXISTING CONTACT

To locate an **Existing Contact**, start from the home screen and select the **Search** icon.

From here you can search for the existing customer by an **Individual** search, **Legal Entity** search, and **Policy** search. Each will have the capability of selecting a **Quick Search** or an **Advanced Search** feature.



ADDING A NEW CONTACT

To add a **New Contact**, start from the home screen and select a line of business to start a **New Quote**.

If the customer is a legal entity, change the customer type from **“Individual”** to **“Legal Entity”** from the drop-down menu.

Add the customer’s Prefix (if applicable), First name, Middle name (Optional), Last name, and Suffix (if applicable).

Anything with a ***Red Asterisk** is required and will not let you proceed until completed.

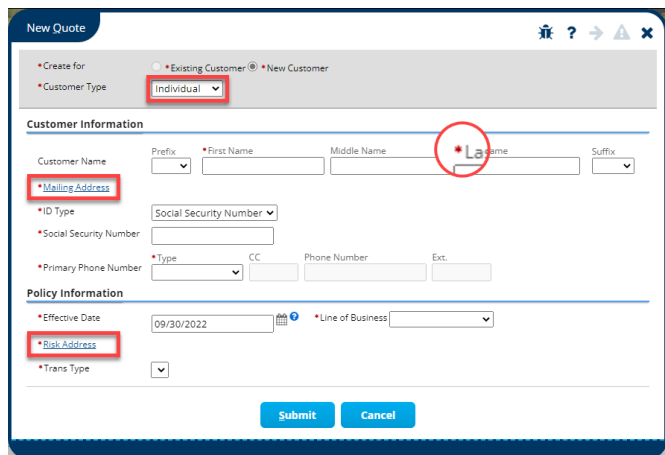


REMEMBER: However, the name is entered here is how the name will be printed on the app and any outgoing mail. Please use proper capitalization.

Name	Name	Name
chris gaines	Chris Gaines	CHRIS GAINES

Enter a **Valid USPS Address** by clicking on the **“Mailing Address”** hyperlink. Keep in mind that this might not be the risk address. The risk address will be added under Policy Information.

Add the **Social Security** or **Tax Identification** number for the individual or entity you are filling out the quote for.



Enter the **Primary Phone** number for the insured. Options include Home Phone, Business Phone, Cell Phone, and Fax. Additional phone numbers can be entered under the **Contact Info** screen viewed on the left of the screen (Customer Info>Contact Info).

EDITING AN EXISTING CONTACT

1. EDIT NAMED INSURED

The Edit Named Insured, Edit Contact Info, and Edit Addresses hyperlinks can be accessed under the Applicant Information heading within the Basic Information screen. This screen is found under the Policy Information Heading on the left side of your Sapiens screen.

The “**Edit Named Insured**” hyperlink allows you to add a new customer or edit the current customer’s information.

BEWARE: Editing the Named Insured here may change their information on ALL other policies, not just the policy you are working on. Please see the “**How Address Changes Affect Other Policies**” section below for more information.

2. EDIT CONTACT INFO

The Edit Contact Info hyperlink will take you back to the Contact Info tab underneath the Customer Info section. Here, you can update Phone Numbers, Email Addresses, Alternative Names, and Addresses.

Options are available to mark phone numbers as **Do Not Call (DNC)** or allow **Texting (TXT)**. Email addresses can also be marked as **Do Not Email (DNE)**, if that is your customer’s wish.

3. EDIT RESIDENCE ADDRESS

The **Edit Residence Address** hyperlink allows you to modify the Residence Address linked to the policy, such as correcting a typo, or allows you to change to a New Residence Address.

REMEMBER: Keep in mind that the residence address may be different than the mailing address.

Applicant Information

- * [Edit Named Insured](#) Chris Gaines
- Membership Number G60195
- Active Membership Number G60195
- * Document Delivery Method Mail
- [Edit Contact Info](#) Primary?
- Home Phone Number (405)918-1234
- Home Email chris.gaines@email.com
- * [Edit Residence Address](#) 1007 Brooks Rd
Marlow, OK 73055

Modify Residence Address

Would you like to :

- Change to a new address not seen in the list below?
- Select an address from the following list?

Address Line 1	Address Line 2	City	State	Zip
4400 Will Rogers Pkwy		Oklahoma City	OK	73108
700 Kansas Ln		Monroe	LA	71203
- Correct the existing address (...it just has a typo)?

1007 Brooks Rd
Marlow, OK 73055

[Continue](#) [Cancel](#)

4. EDIT MAILING ADDRESS

Similarly, the **Edit Mailing Address** hyperlink allows you to correct the existing mailing address, such as correcting a typo, or allows you to change to a new mailing address.

Applicant Information

- * [Edit Named Insured](#) Chris Gaines
- Membership Number
- Active Membership Number
- * Document Delivery Method Mail
- [Edit Contact Info](#) Primary?
- Home Phone Number (405)918-1234
- Home Email chris.gaines@email.com
- Work Email
- * [Edit Residence Address](#) 1007 Brooks Rd
Marlow, OK 73055
- * [Edit Mailing Address](#) 1007 Brooks Rd
Marlow, OK 73055
- * County (moratorium) Stephens County

Modify Mailing Address

Would you like to :

- Change to a new address not seen in the list below?
- Select an address from the following list?

Address Line 1	Address Line 2	City	State	Zip
4400 Will Rogers Pkwy		Oklahoma City	OK	73108
700 Kansas Ln		Monroe	LA	71203
- Correct the existing address (...it just has a typo)?

1007 Brooks Rd
Marlow, OK 73055
US

[Continue](#) [Cancel](#)

5. HOW ADDRESS CHANGES AFFECT OTHER POLICIES

If you are not careful, you could unintentionally change an address on another policy linked to the same person.

If an insured has **Multiple Policies** and you are attempting to change the address on only **ONE policy**, you will need to select or deselect the checkboxes next to the appropriate options in the **Addresses to be Changed** menu (see below).

This is especially important to consider when entering Additional Interests such as Mortgages and Lienholders.

TIP: Creating a **NEW** Mortgagee or Lienholder each time will ensure you are starting with the proper information and will help prevent other users from updating your policy information.

The screenshot displays two overlapping windows from a software interface. The top window, titled "Addresses to be Changed", contains a table with two columns: "Previous Address" and "Updated Address". Both columns list the address "1007 Brooks Rd, Marlow, OK 73055, US". Below this table are sections for "People and Organizations" and "Quote 26200001 [1] Homeowners", each with several checkboxes. The bottom window, titled "Customer Comparison", compares "New Customer" and "Existing Customer" data. A red box highlights the "New Customer" column, which includes fields like First Name (Bill), Middle Name, Last Name (Garrett), Suffix, Phone #, Tax ID (630-41-2512), Address Type (HOME), Address Line 1 (1208 W Griggs Way), Address Line 2, City (Mustang), State/Province (OK), Postal Code (73064), and Country (US). The "Existing Customer" column shows similar data with a Tax ID of 634-02-1254 and Address Line 1 of 1201 W Griggs Way.

BEWARE: Editing the Named Insured, Contact Info, and Addresses may change their information on all other policies if you are not careful. You may choose to make a change to all the associated policies, but make sure that is an intentional choice and not an unintentional accident.