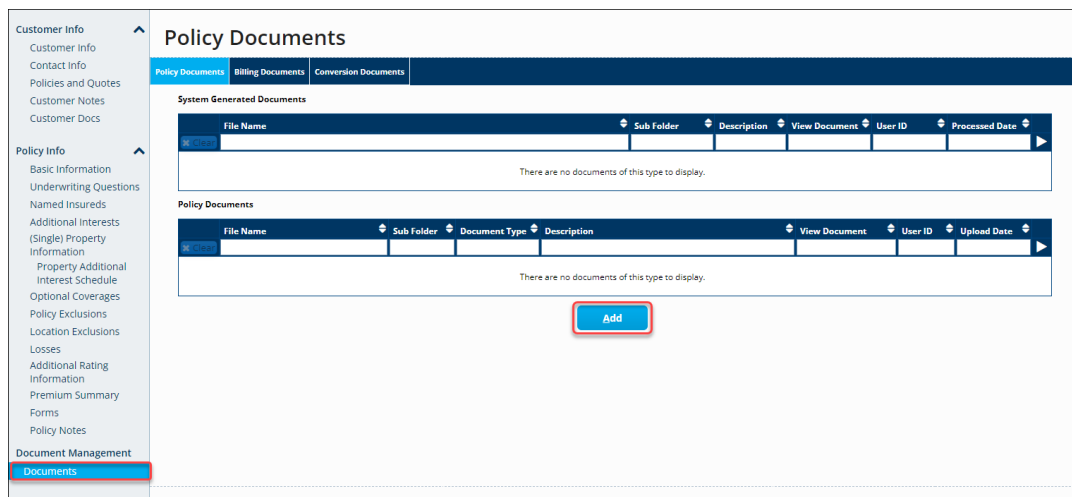


IT IS IMPORTANT TO REMEMBER THAT

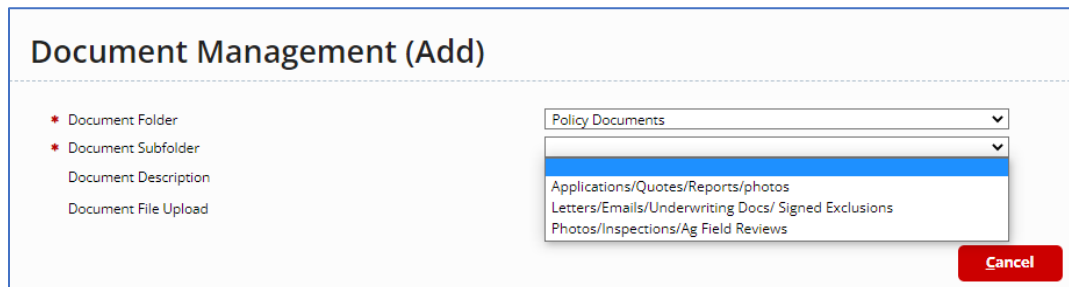
ALL DOCUMENTS AND PHOTOS MUST BE SUBMITTED ELECTRONICALLY

Sapiens allows agents and home office users a place to store all the documents associated with a policy and customer. All documents such as Applications, Exclusions, Cancellations, Photos, and other supporting documents must be uploaded into the Documents section. This **Document** section will serve as your electronic file storage for your customers.

First, go into the policy the user would like to add a document to. To access the **Documents** page, a user will click on the **Documents** tab located on the left-hand side of the screen.



To add a document, click on the **ADD** button in the center of the screen.



After clicking **ADD**, the fields are **Document Folder**, **Document Subfolder**, **Document Description**, and **Document File Upload**. A user will click on the **Document subfolder** and select the category associated with the document they are adding. Subfolder options include:

- Applications/Quotes/Reports/Photos
- Letters/Emails/Underwriting Docs/Signed Exclusions
- Photos/Inspections/Ag Field Reviews

Placing the items in the correct folder will help you if you need to locate items in the future.

DOCUMENT MANAGEMENT

PolicyPro by Sapiens

A screenshot of the 'Document Management (Add)' form. The form has a white background with a blue border. At the top, the title 'Document Management (Add)' is centered. Below the title, there are four rows of labels: 'Document Folder', 'Document Subfolder', 'Document Type', and 'Document Description'. To the right of these labels are three dropdown menus. The first dropdown menu is set to 'Policy Documents'. The second dropdown menu is set to 'Applications/Quotes/Reports/photos'. The third dropdown menu is currently empty. A red circle highlights the 'Document Type' label and its corresponding dropdown menu. Below the dropdown menus, there is a text input field for 'Document File Upload' with the placeholder text 'No file attached.' and a blue 'Attach' button. At the bottom right of the form is a red 'Cancel' button.

Once a **Document Subfolder** has been selected, a new field **Document Type** will be available.

If **Applications/Quotes/Reports/Photos** is selected, the options include:

- Applications
- Quotes
- CLUE
- Ins Scores
- Criminal Report
- Prior Carrier
- MVR
- Cost Estimator
- Photos (See bottom for a shortcut on adding multiple photos)
- Other

If **Letters/Emails/Underwriting Docs/Signed Exclusions** is selected, the options include:

- Adverse Action Letter
- Underwriting Letters
- Mortgage/Lienholder letters – cancelations
- Emails (from agent/or to agent or employee to employee)
- System-generated letters
- Good student
- Alarm Certificates
- Appraisals
- Roof Affidavit/UL2218 proof
- Signed Exclusions
- Accident prevention
- Risk alert
- EARS
- Risk advice (From claims)
- Signature pages (signed cancellation form/midterm change requiring a signature)
- Umbrella questionnaire
- Other

DOCUMENT MANAGEMENT

PolicyPro by Sapiens



If **Photos/Inspections/Ag Field Reviews** is selected, the options include:

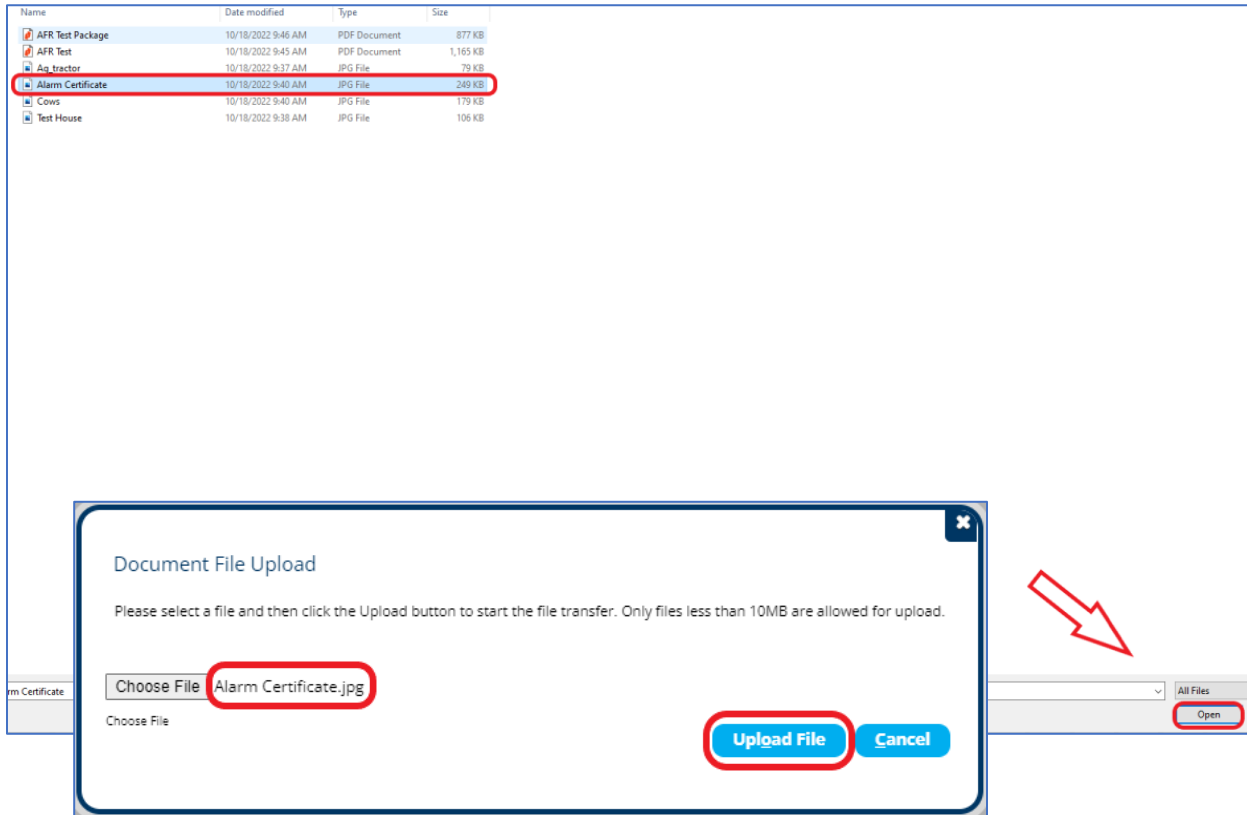
- Photos
- Inspections
- Ag Field Review Document
- Location Diagram
- Other

The screenshot shows a form titled "Document Management (Add)". It contains several fields: "Document Folder" (dropdown menu with "Policy Documents" selected), "Document Subfolder" (dropdown menu with "Letters/Emails/Underwriting Docs/ Signed Exclusions" selected), "Document Type" (dropdown menu with "Alarm certificates" selected), "Document Description" (text input field containing "ADT Alarm", highlighted with a red circle), and "Document File Upload" (text input field containing "No file attached." with an "Attach" button next to it). A "Cancel" button is located at the bottom right of the form.

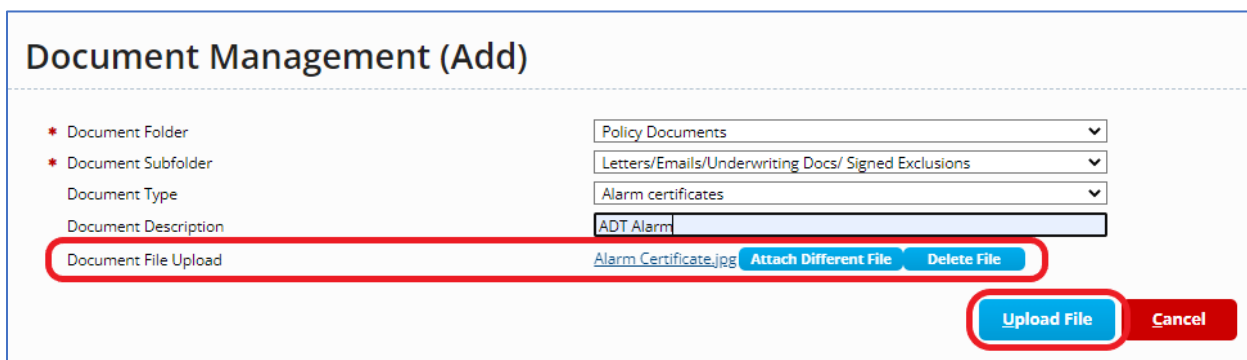
After a **Document Subfolder** and **Document Type** have been selected, a user has the option to enter a **Document Description**. This field allows up to 250 characters. The example above shows an alarm certificate being entered.

This screenshot shows the same "Document Management (Add)" form as above, but with a modal dialog box open for "Document File Upload". The modal dialog box contains the text "Please select a file and then click the Upload button to start the file transfer. Only files less than 10MB are allowed for upload." Below this text is a "Choose File" button (highlighted with a red circle) and a "No file chosen" label. At the bottom of the modal dialog box are "Upload File" and "Cancel" buttons. The "Document Description" field in the background form is still visible and contains "ADT Alarm".

To add an attachment, click **Attach**. The **Document File Upload** screen will pop up to allow you to choose the file from your computer.

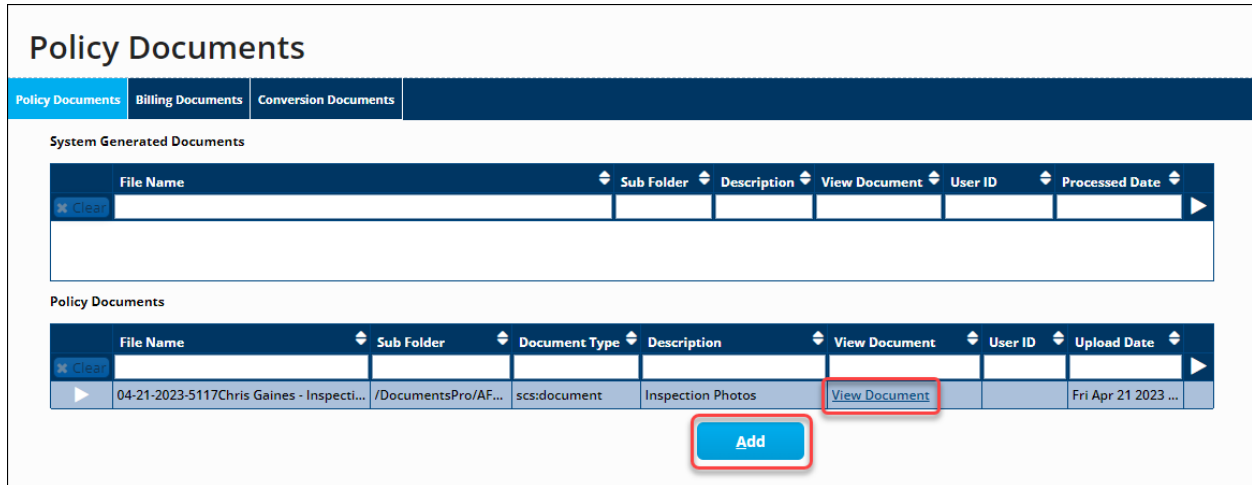


Select the document you want to upload from your computer and click **Open**. Next the Document you have selected will show on the **Document File Upload** screen. If the information is correct, select **Upload File**.



Once you click **Upload File**, it will bring them back to the **Document Management** screen.

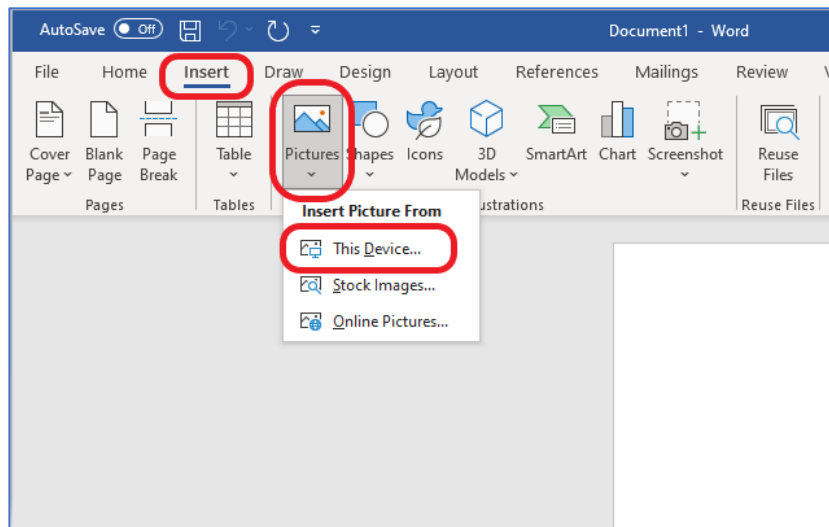
From here you can click the **View Document** hyperlink to view the document or **Add** to upload another document.



ADDING PHOTOS

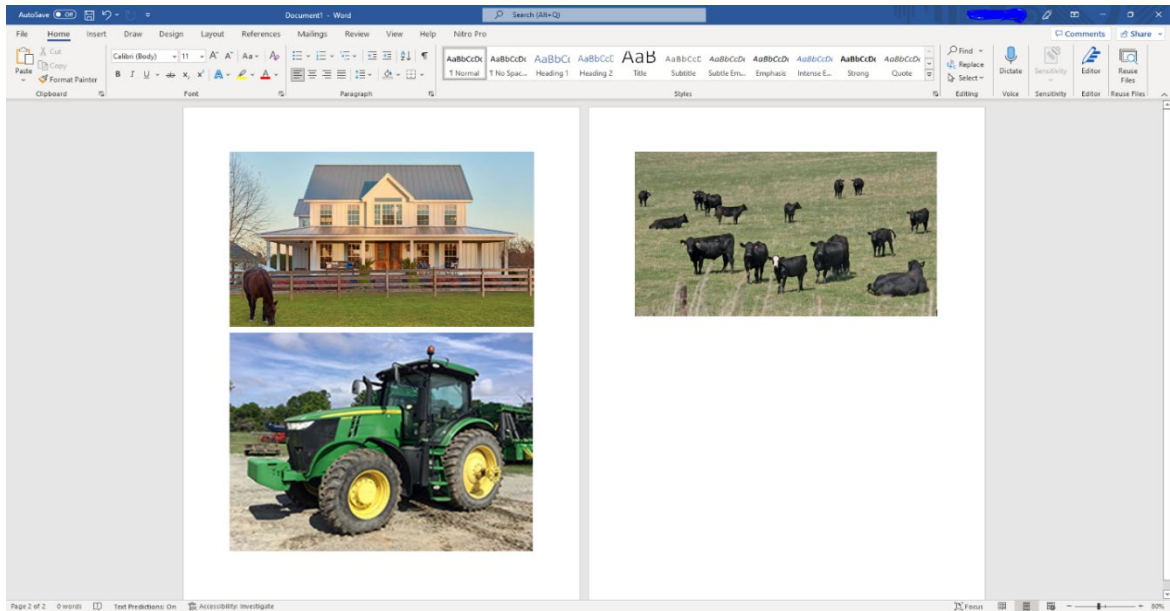
A user can add photos two ways. The first option is to add each photo individually. The second option is to create a PDF document containing all of the photos, which can then be uploaded all at one time.

- How to create a pdf document of photos.
 - Open a new blank Microsoft Word Document
 - Add photos by clicking **Insert>Pictures>From this Device** or drag and drop from your photo folder.



DOCUMENT MANAGEMENT

PolicyPro by Sapiens



- Repeat this process until all photos have been added. (Example: Photos of house, tractor, and cows)
- When all photos have been added save the document as a PDF. To do this in the top left- hand corner click **File>Print>Change printer to “Print to PDF” option>Press Print**. From here the computer will ask you where you’d like the PDF document saved.
- After the PDF is saved, simply upload the PDF document to the Documents folder using the same steps discussed previously in this training piece.

