

How to upload documents and photos to a policy.

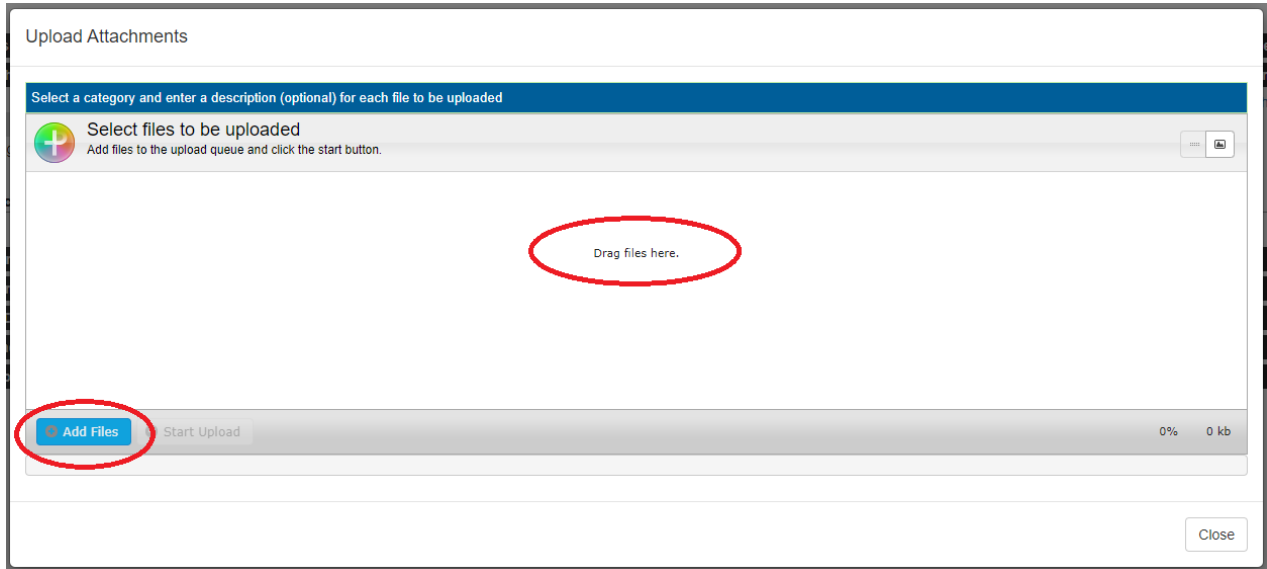
1. On the policy information screen (the home screen of the policy) select **Activity** from the left side menu.

The screenshot shows the 'Policy Info' screen for 'CAROLINA WREN' (Policy ID: AL00105021-00). The left-hand navigation menu includes 'Summary', 'Accounting', 'Status', 'Activity' (circled in red), and 'Customer Contact'. The main content area displays policy details such as 'Personal Auto Policy', 'Policy Term: 6 Month', 'Status: Active', and 'Financial Summary'. The 'Activity' section indicates 'No claims exist for this policy.'

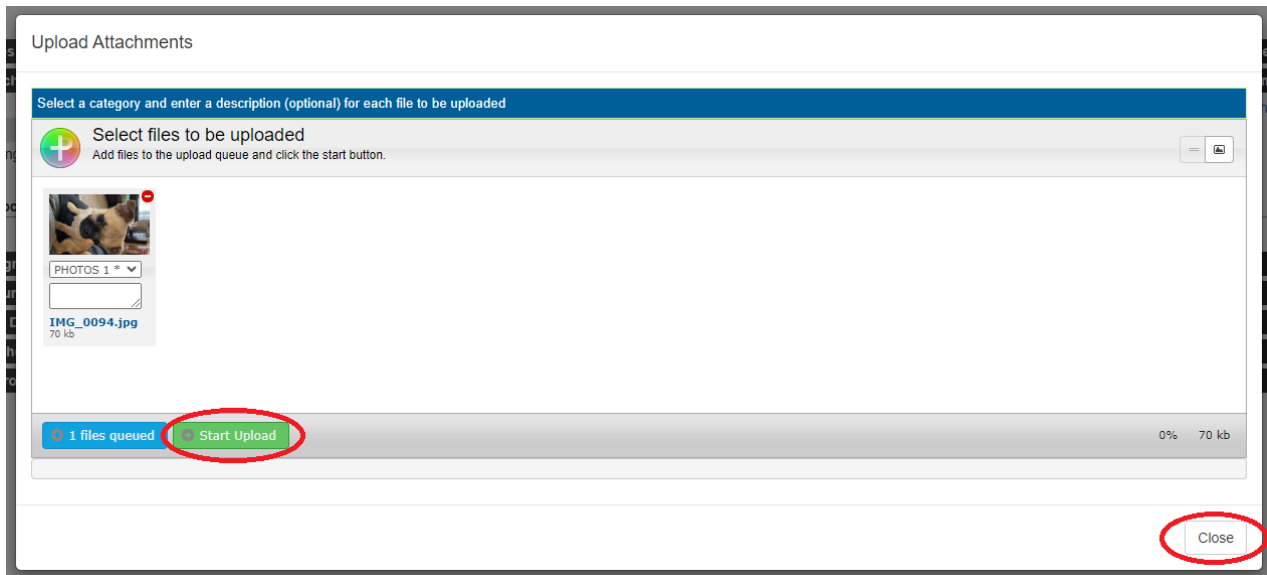
2. The second Black Bar running across the page is titled **Attachments**. On the far right side of the bar titled Attachments, click on the word **ADD: Attachment**.

This screenshot shows the 'Attachments' section of the policy information screen. A black bar at the top of the section displays 'Attachments - 0 Total' and 'ADD: Attachment' (circled in red). Below this bar, there are sections for 'Policy Documents' and 'Notes/Suspenses'. The 'Policy Documents' section lists various document types like 'E-Signature Document Link', 'Documents - 0 Total', 'POS Docs Link', 'Batched Items & Memos - 10 Total', and 'Unprocessed Batch Items & Memos - 8 Total'.

- A popup will load where you can either drag and drop files or use the blue Add Files button to choose from your file directory.



- Once your files are in place select the green **Start Upload** button. Once files are uploaded select **Close**.



- Use the + - to expand the attachments section.

Policy Info **CAROLINA WREN** 123 WREN RD ALEXANDER CITY, AL 35010 | (123) 456-7778 AL00105021-00
03/05/2024 - 09/06/2024

Summary Accounting Status **Activity** Customer Contact

Notes/Suspenses

Notes & Suspenses - 15 Total ADD: Note | Suspense

Attachments - 2 Total ADD: Attachment

Include: Attachments Show All

Date	Category	File	User
4/10/2024 12:17 PM	GENERAL	IMG_0094.jpg	TC NEW
4/10/2024 12:17 PM	GENERAL	5645D2A0-6B56-40AB-9072-60E7FCFDEF28.JPG	TC NEW

Policy Documents

- E-Signature Document Link
- Documents - 0 Total
- POS Docs Link
- Batched Items & Memos - 13 Total
- Unprocessed Batch Items & Memos - 8 Total

