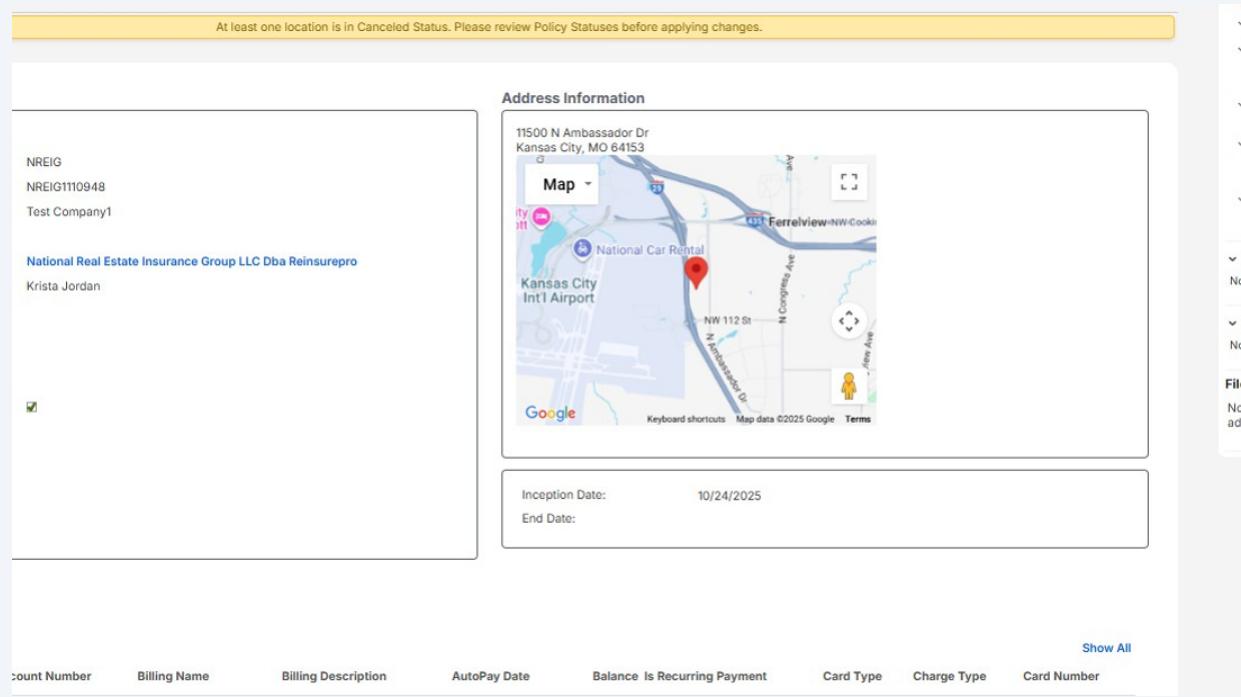


Adding New Location 10.30.25



This guide provides a step-by-step process for adding new locations to an account policy, ensuring users can efficiently manage their policies. It simplifies the procedure by outlining essential actions, from selecting effective dates to binding proposals, making it accessible even for those unfamiliar with the system.

- 1 On the Accounts page, scroll down to the Policies section and select the 'Account Policy' link (indicated in orange).



The screenshot shows the 'Address Information' section of a policy configuration screen. At the top, a yellow banner displays the message: 'At least one location is in Canceled Status. Please review Policy Statuses before applying changes.' Below this, the 'Address Information' section includes a map showing the location at 11500 N Ambassador Dr, Kansas City, MO 64153. The map highlights the area around the Kansas City International Airport and shows nearby roads like NW 112 St and N Congress Ave. Below the map, the 'Inception Date' is listed as 10/24/2025 and the 'End Date' is listed as 10/24/2025. To the right of the map, there is a vertical sidebar with several dropdown menus and checkboxes, including 'File' and 'No f add'. At the bottom of the screen, there is a table header with columns: Account Number, Billing Name, Billing Description, AutoPay Date, Balance, Is Recurring Payment, Card Type, Charge Type, and Card Number. A 'Show All' link is located at the top right of this table header.

Policies

Effective Date	Policy Number	Account Policy	Attach#	Description	Policy Display Status
10/24/2025	25-1110948-0004	No	1297811	24 W 78th Ter: 25-26	In Force
10/24/2025	25-1110948-0003	No	1297809	8117 Summit St: 25-26	In Force
10/24/2025	25-1110948-0001		1297807	9501 Wornall Rd: 25-26	Cancelled
10/24/2025	25-1110948	Yes	1297806	Test Company: 25-26	In Force

Active Proposals

Proposal Number	Account Number	Description	# Of Locations	Type	Client Service Advisor	Regional Agency Manager	Status	Re St
P000098747	NREIG1110948			Application	Krista Jordan	Direct Book	In Application	

2 Under Self-Service Options, click the 'Add New Location(s) to Account Policy' button.

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Policies > [25-1110948 - Test Company1](#) ★

Account Policy -- Account Policy -- Account Policy -- Account Policy

Self Service Options

New Adds: [Add New Location\(s\) to Account Policy](#)

If you wish to modify or cancel a single location, navigate to the location policy and endorse from there

Account Information

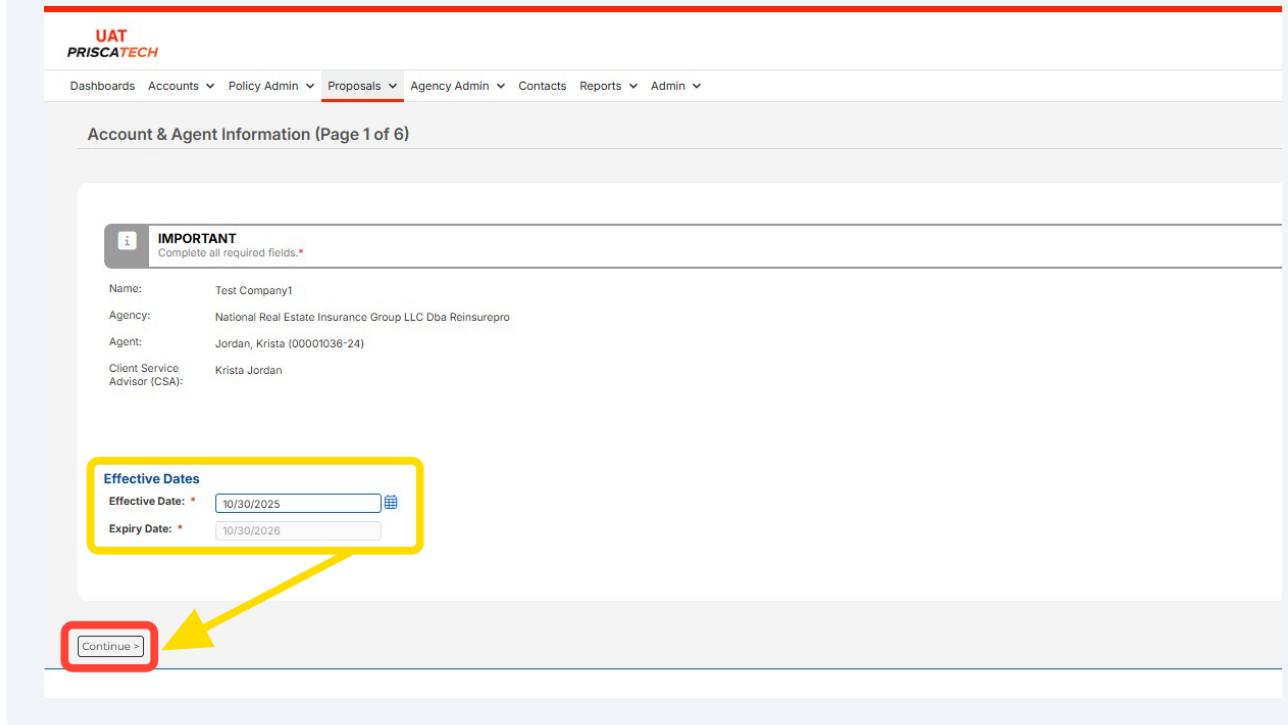
Account:	Test Company1
Account Number:	NREIG1110948
AMP Fee Rate:	0.00
Referral Percentage:	0.00
Client Service Advisor:	Krista Jordan

Agent Information

Agency:	National Real Estate I
Agent:	Jordan, Krista
Commission Percentage:	0.00

Premium Information

3 Use the calendar icon to select your proposal's Effective Date. The Expiry Date will populate automatically. Click 'Continue' to proceed.



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Account & Agent Information (Page 1 of 6)

IMPORTANT
Complete all required fields.*

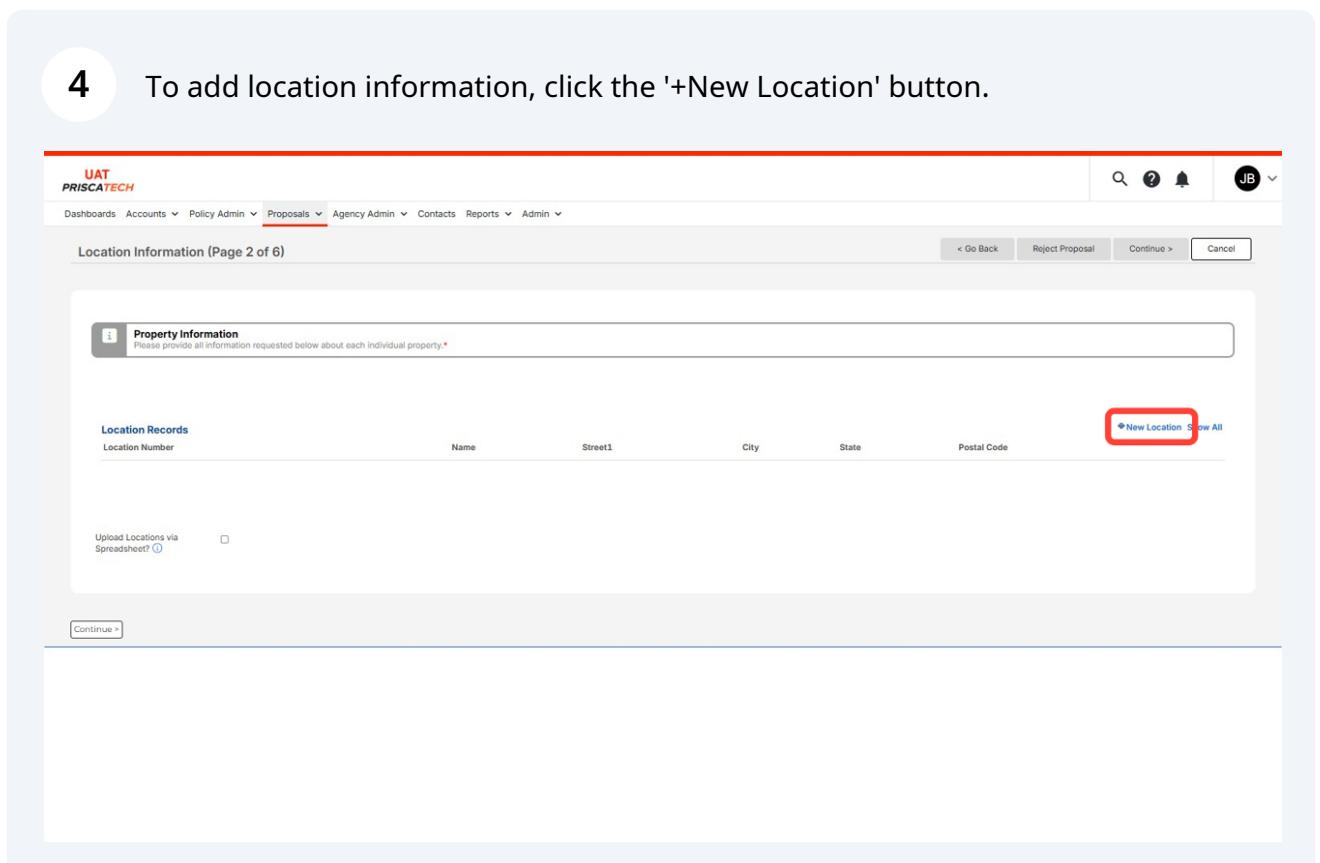
Name: Test Company1
Agency: National Real Estate Insurance Group LLC Dba Reinsurepro
Agent: Jordan, Krista (00001036-24)
Client Service Advisor (CSA): Krista Jordan

Effective Dates

Effective Date: * 
Expiry Date: *

Continue >

4 To add location information, click the '+New Location' button.



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Location Information (Page 2 of 6)

Property Information
Please provide all information requested below about each individual property.*

Location Records

Location Number	Name	Street1	City	State	Postal Code

+New Location [Show All](#)

Upload Locations via Spreadsheet?

Continue >

5 Begin typing the address into the Street 1 field, then select the correct location from the dropdown menu, and click 'Save Changes' to proceed.

New Location Schedule

Address Information

Override the address? [?](#)

Street1: *

City: *

State: *

Postal Code: *

County: *

Accounts ▾ Policy Admin ▾ **Proposals** ▾ Agency Admin ▾ Contacts Reports ▾ Admin ▾

Location Schedule

Save Changes Cancel

Address Information

Override the address? [?](#)

Street1: *

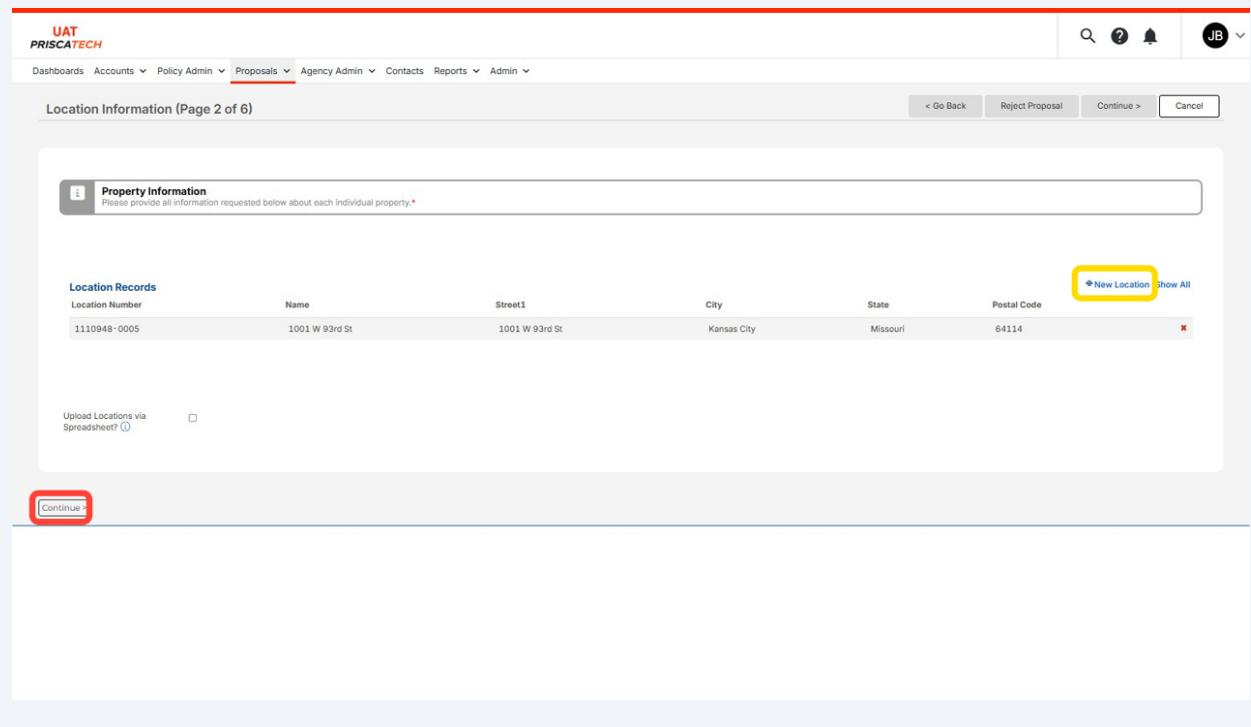
City: *

State: *

Postal Code: *

County: *

6 Add additional locations, or click 'Continue' to proceed.



Location Information (Page 2 of 6)

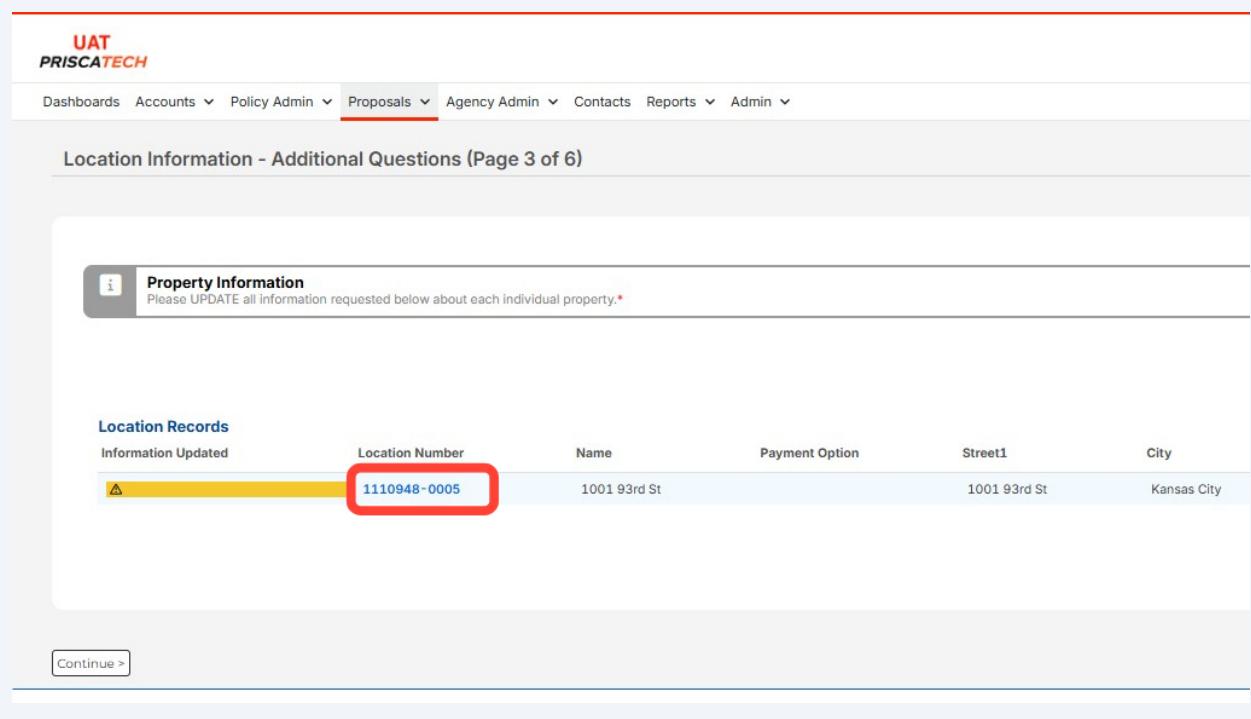
Property Information
Please provide all information requested below about each individual property.*

Location Number	Name	Street1	City	State	Postal Code
1110948-0005	1001 W 93rd St	1001 W 93rd St	Kansas City	Missouri	64114

Upload Locations via Spreadsheet?

[Continue >](#)

7 Click the 'Location Number' to enter property information.



Location Information - Additional Questions (Page 3 of 6)

Property Information
Please UPDATE all information requested below about each individual property.*

Information Updated	Location Number	Name	Payment Option	Street1	City
▲	1110948-0005	1001 93rd St		1001 93rd St	Kansas City

[Continue >](#)

8 Enter the required property details.

Schedule: 1110948-0005 - 1001 93rd St

Save Chan

Hazard Hub Information

Property Details

Type: * Single Family

Square Feet ⓘ 1,219

Override Square Feet: - None Selected -

Construction Type: - None Selected -

Status: * Occupied Rental Dwelling

Number of Stories: *

Year Built: * 1957

Year Roof: - None Selected -

Year Electric: - None Selected -

Year Plumbing: - None Selected -

Year HVAC: - None Selected -

Property Coverage

* No

i Declining Property Coverage means no physical damage to any building at the location will be covered.

9 To add Liability Coverage, select 'Yes' from the dropdown menu, then choose the appropriate Liability Limit and any applicable Ancillary Coverages.

Other Structure Limits: * 0.00

Total Value: 355,000.00

Total Sq Ft: 1,219

ITV ⓘ 291.22

Liability Coverage

* Yes

Liability limit: * \$1M per occurrence / \$2N

Tenant Protector Plan

ⓘ * No

Earth Movement Coverage

ⓘ * No

10

Complete both the required and optional Location Eligibility questions, then click 'Save Changes' to proceed.

Schedule: 1110948-0005 - 100193rd St

Lender Paid:

Location Eligibility Questions

Subject To: Yes No

Tenants Subsidized %

Is this lender placed coverage or a non performing note? Yes No

Does the lender require Lenders Loss Payee? Yes No

Type of wiring present for the current electrical system?

Does the property have an elevator, lift or hoist on premises? Yes No

Is this property owner occupied or intended as a primary residence for the owner? Yes No

Is the property on stilts (not including crawlspaces)? Yes No

Is location greater than 2 stories? Yes No

Save Changes **More** **Cancel**

Schedule: 1110948-0005 - 100193rd St

Yes No

Are locks changed or replaced upon a tenant leaving? Yes No

Are there any existing damage or maintenance issues at the property? Yes No

Does the location have a wood shake roof? Yes No

When required, are the heating, electrical and plumbing systems serviced by a qualified trade professional? Yes No

Does the property have Exterior Insulating Finishing Systems (EIFS) on supporting structures? Yes No

Is Premises kept in a well-maintained status? Yes No

Is the location leased to students? Yes No

Is Renters Insurance required? Yes No

Save Changes **More**

11 After entering all new locations, click 'Continue' to proceed.

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Location Information - Additional Questions (Page 3 of 6)

Property Information
Please UPDATE all information requested below about each individual property.*

Information Updated	Location Number	Name	Payment Option	Street1	City	State
<input checked="" type="checkbox"/>	1110948-0005	1001 93rd St	Insured Monthly	1001 93rd St	Kansas City	Missouri

Location Records

Continue >

12 The system will check for any duplicate location information. Once the check is cleared, click 'Continue' to proceed.

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Check Application for Issues (Page 4 of 6)

Clearance Passed
No duplicates have been found for the location information entered. Confirm and continue the application.

Continue >

13 Verify and confirm payment method/frequency, then click 'Continue' to proceed.

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Payment Options (Page 5 of 6) < Go Back Reject Proposal Continue > Cancel

Do you want to pay 12 months and the one time setup fee for the locations in this proposal?
Pay In Full:

You are Paying Monthly.

Payment Method ⓘ

ACH Credit Card

Continue >

14 Review the location summary, including the total cost, then click 'Submit Proposal' to proceed.

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Confirmation Page (Page 6 of 6)

Please review the details below for a summary of your application.

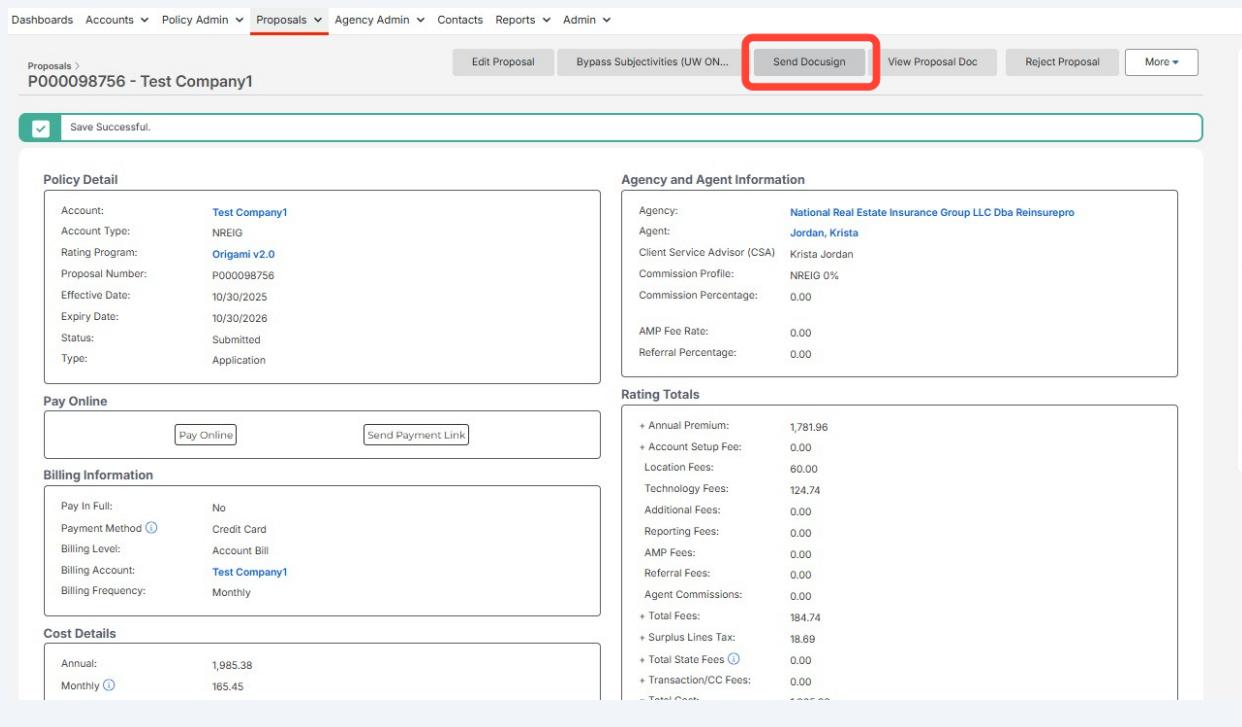
• Insured Name: Test Company1	• Agency: National Real Estate Insurance Group LLC Dba Reinsurepro
• Created By: Jeromey Bell	• Agent: Krista Jordan
• Date Created: 10/30/2025	• Effective Date: 10/30/2025
• Commission: 0.00%	

Please Submit Proposal

Submit Proposal

15

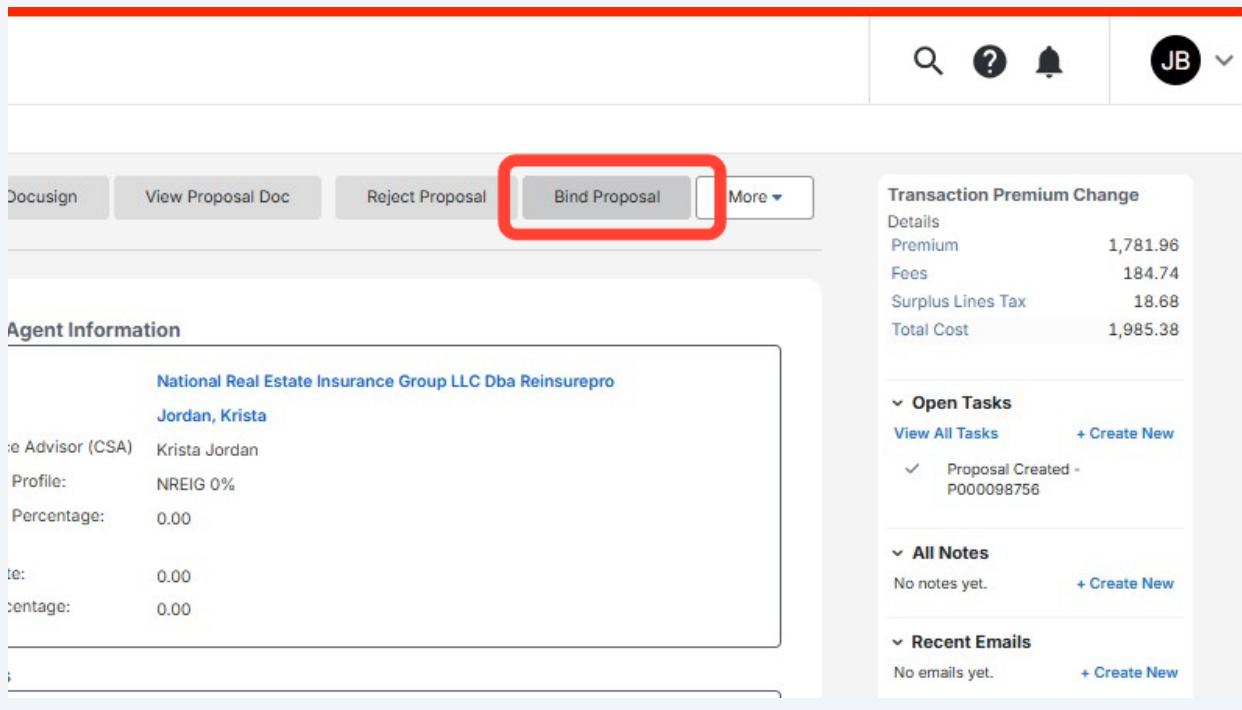
Click 'Send Proposal Doc' to send the document to the client for completion via DocuSign.



The screenshot shows the 'Proposals' section of a software interface. The top navigation bar includes 'Dashboards', 'Accounts', 'Policy Admin', 'Proposals' (which is highlighted in red), 'Agency Admin', 'Contacts', 'Reports', and 'Admin'. Below the navigation is a breadcrumb trail: 'Proposals > P000098756 - Test Company1'. A red box highlights the 'Send DocuSign' button in the top right of the main content area. A success message 'Save Successful.' is displayed in a green bar at the top. The main content area contains several sections: 'Policy Detail' (with fields like Account: Test Company1, Account Type: NREIG, etc.); 'Agency and Agent Information' (with fields like Agency: National Real Estate Insurance Group LLC Dba Reinsurepro, Agent: Jordan, Krista, etc.); 'Rating Totals' (with a table of fees); 'Pay Online' (with 'Pay Online' and 'Send Payment Link' buttons); 'Billing Information' (with fields like Pay In Full: No, Payment Method: Credit Card, etc.); 'Cost Details' (with fields like Annual: 1,985.38, Monthly: 165.45); and 'Rating Totals' (with a table of fees).

16

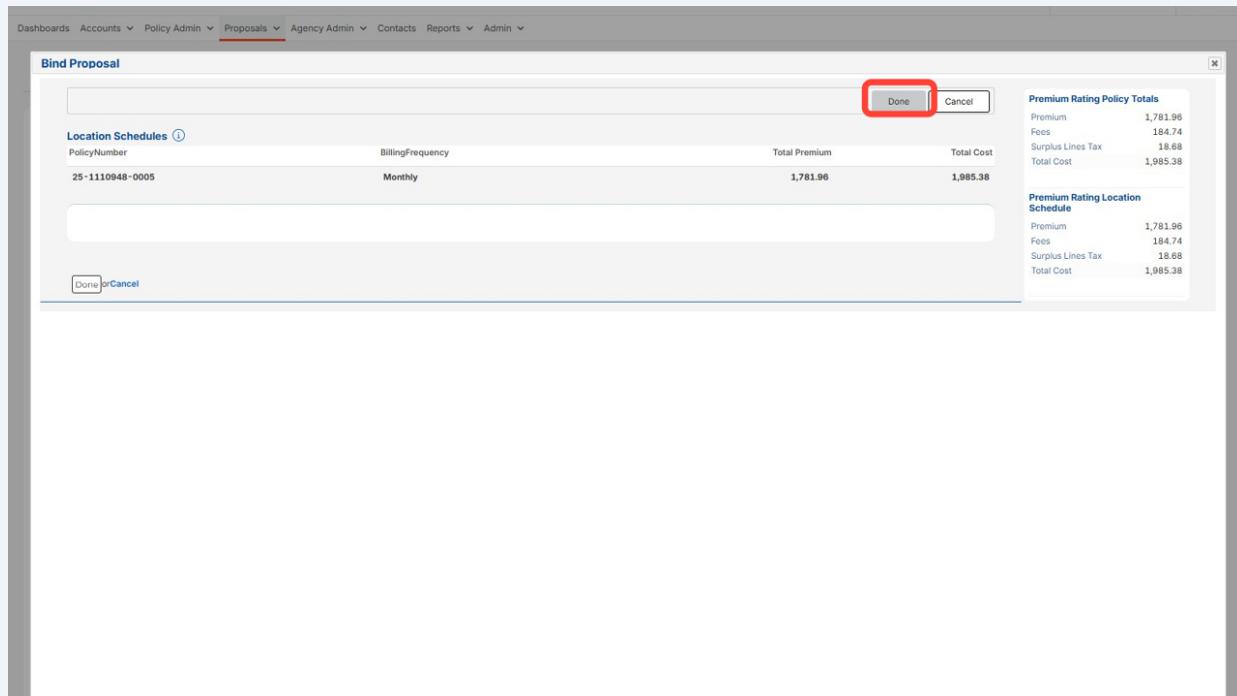
Once the signed documents are confirmed, click 'Bind Proposal' to initiate the binding process.



The screenshot shows the 'View Proposal Doc' page for proposal P000098756. The top navigation bar includes a search icon, a question mark icon, a bell icon, and a user icon (JB). Below the navigation is a toolbar with buttons: 'Docusign', 'View Proposal Doc' (disabled), 'Reject Proposal' (disabled), 'Bind Proposal' (highlighted with a red box), and 'More'. The main content area contains sections: 'Agent Information' (with details for Krista Jordan, NREIG 0%); 'Transaction Premium Change' (with a table of fees: Premium 1,781.96, Fees 184.74, Surplus Lines Tax 18.68, Total Cost 1,985.38); 'Open Tasks' (with a task: 'Proposal Created - P000098756'); 'All Notes' (with a note: 'No notes yet.'); and 'Recent Emails' (with a note: 'No emails yet.'). The 'Bind Proposal' button is the primary focus of the red box.

17

Once the binding process is complete, click 'Done' to finalize the process.



10948 - Test Company1

Quote Proposal has been bound.

Account Information

Account:	Test Company1
Account Number:	NREIG1110948

Related Location Policies

Policy Number	Effective Date	Good To Reinstate	Description	Billing Account	Monthly Cost	Annual Total
25-1110948	10/24/2025		Test Company: 25-26	Test Company1	176.71	2,0
25-1110948-0004	10/24/2025		24 W 78th Ter: 25-26	Test Company1	109.92	1,3
25-1110948-0003	10/24/2025		8117 Summit St: 25-26	Test Company1	180.53	2,1
25-1110948-0005	10/30/2025		1001 93rd St: 25-26	Test Company1	165.45	1,9

1 RECORDS