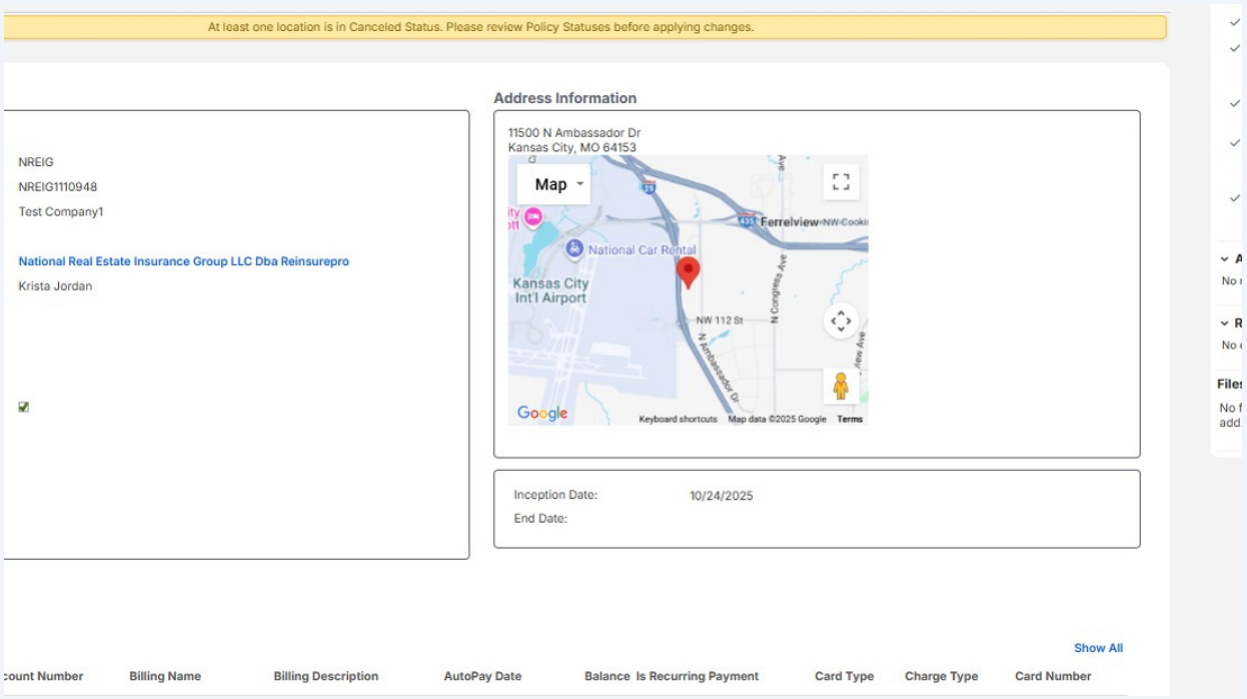
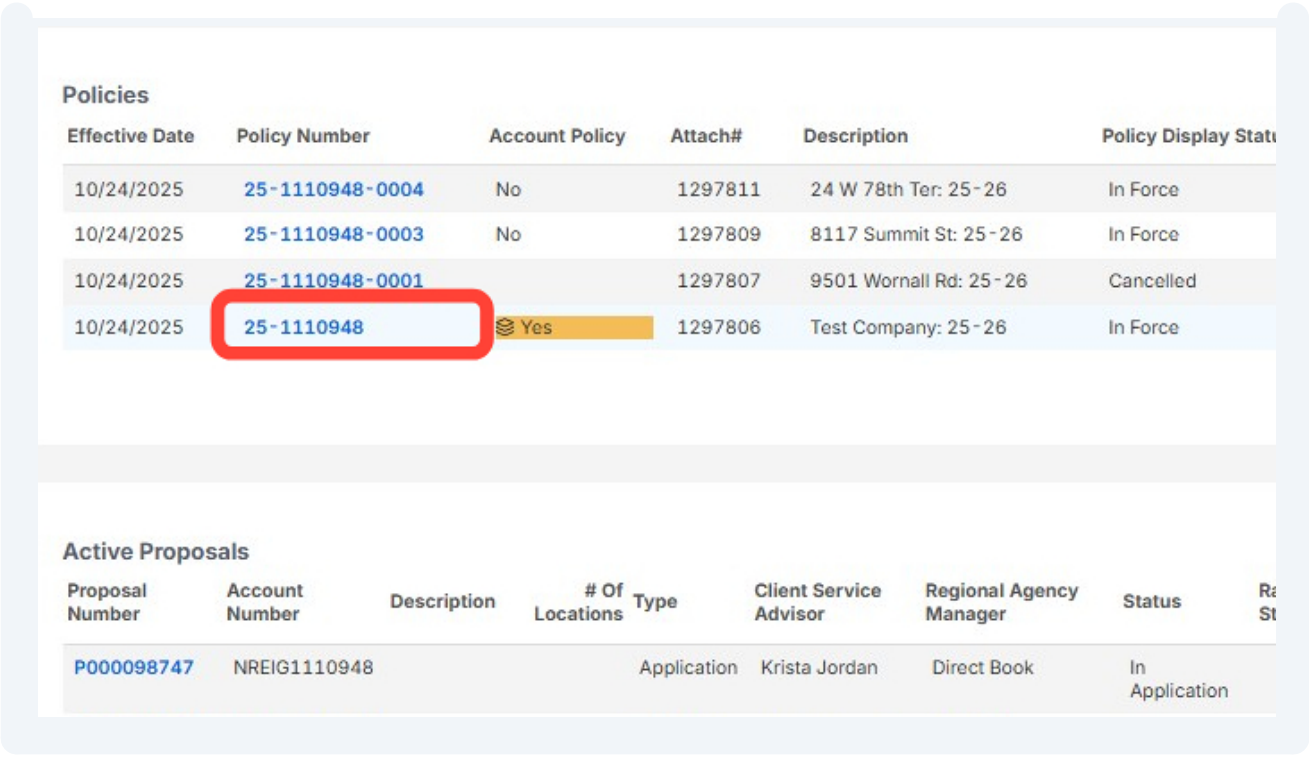
Adding New Location 10.30.25

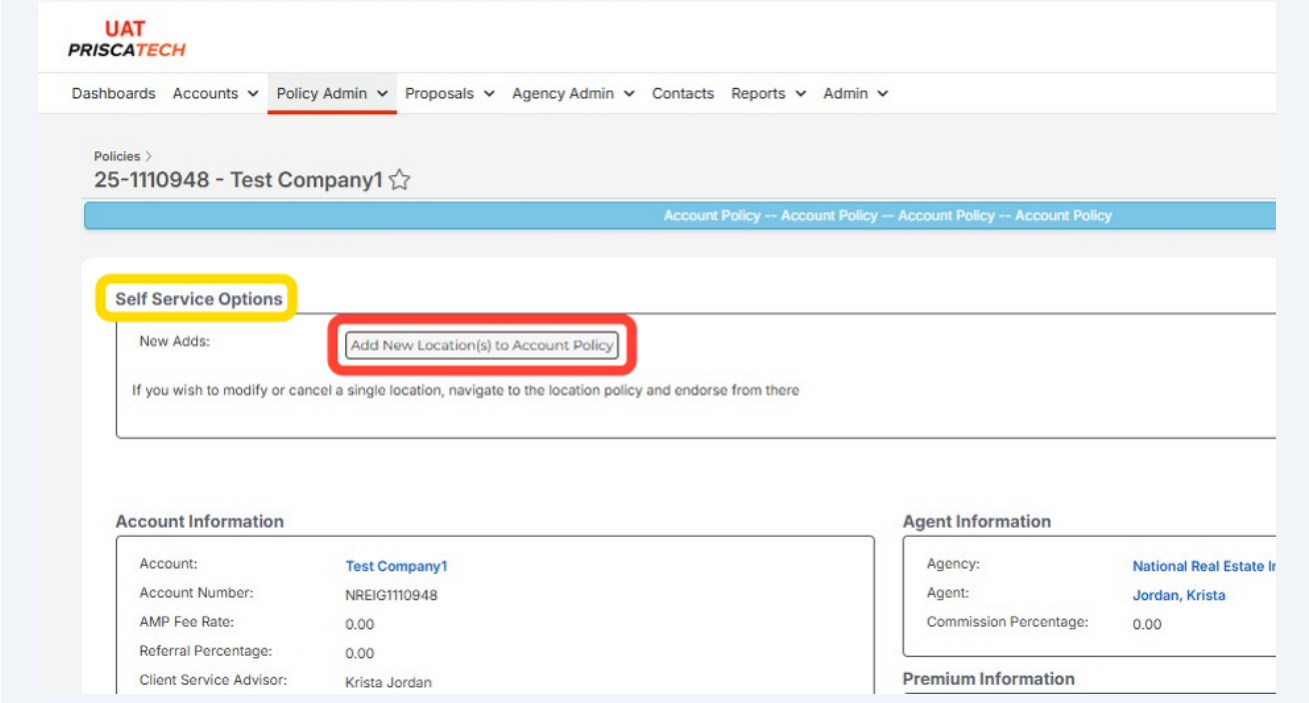
This guide provides a step-by-step process for adding new locations to an account policy, ensuring users can efficiently manage their policies. It simplifies the procedure by outlining essential actions, from selecting effective dates to binding proposals, making it accessible even for those unfamiliar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

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

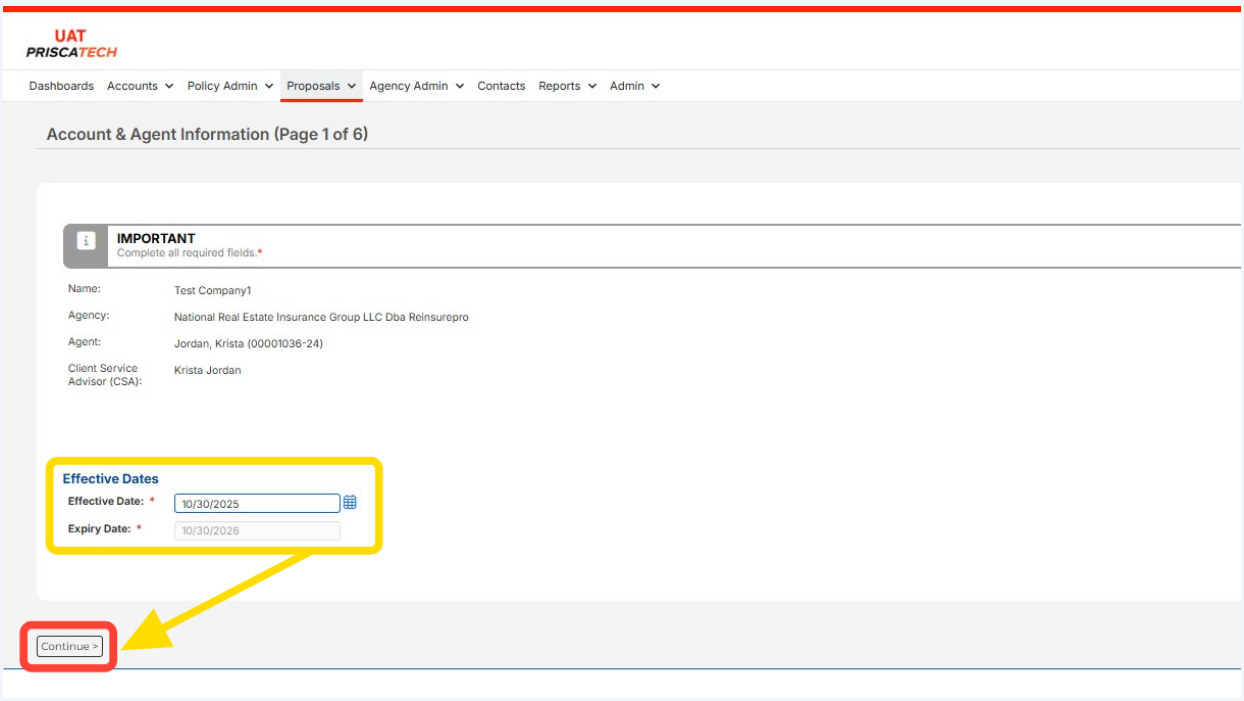




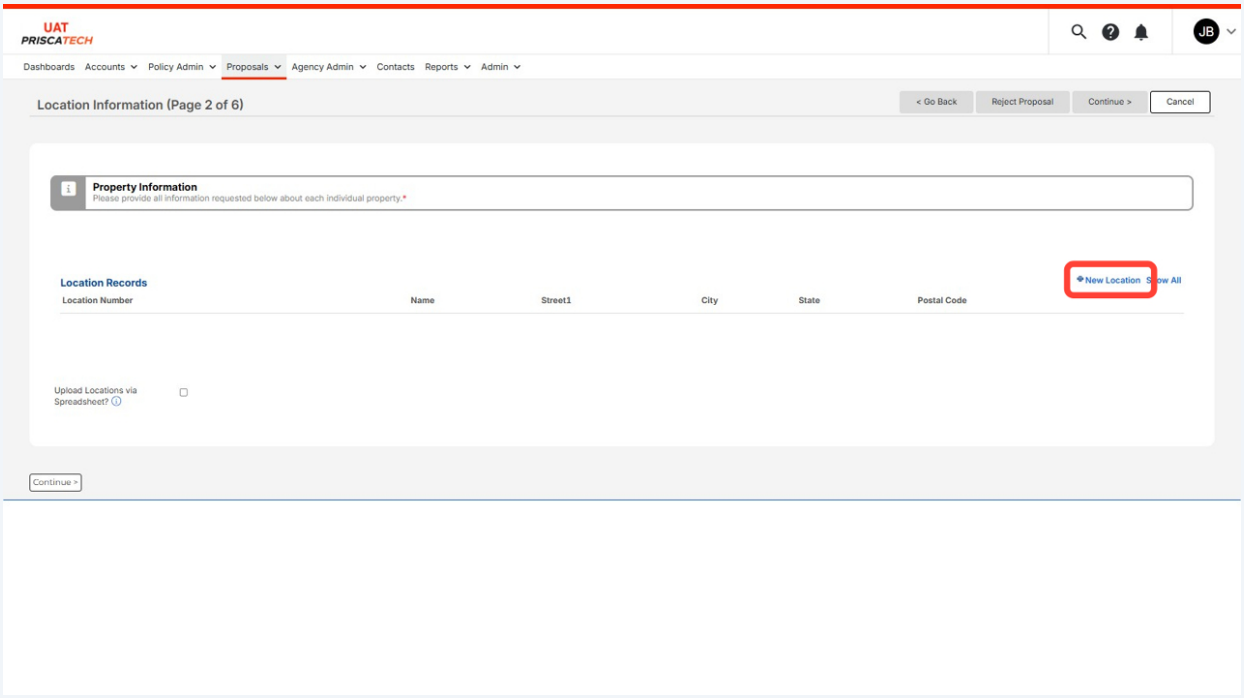
2 Under Self-Service Options, click the 'Add New Location(s) to Account Policy' button.



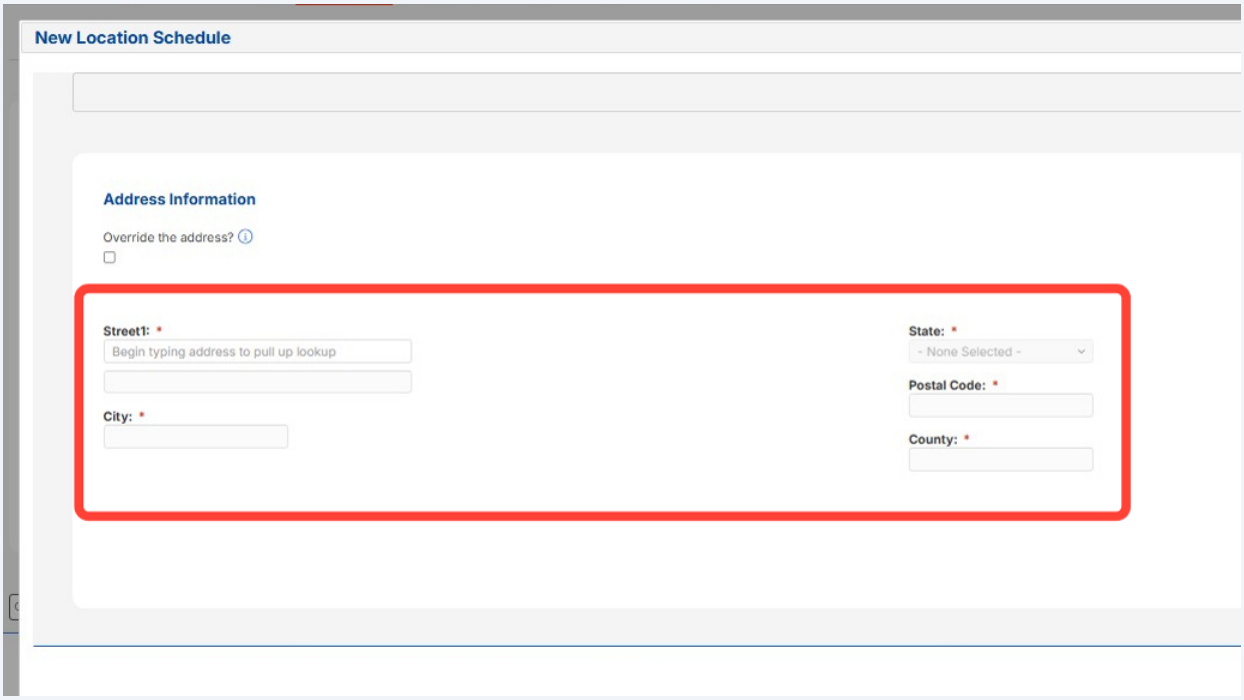
3 Use the calendar icon to select your proposal's Effective Date. The Expiration Date will populate automatically. Click 'Continue' to proceed.

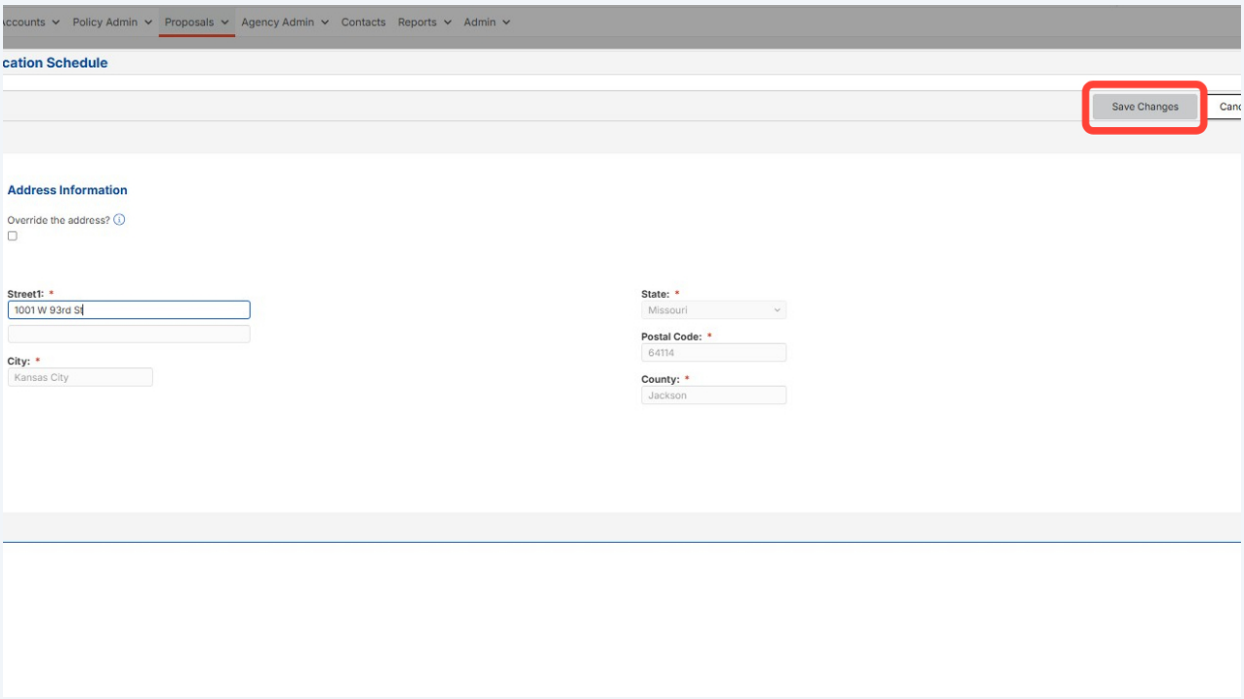


4 To add location information, click the '+New Location' button.

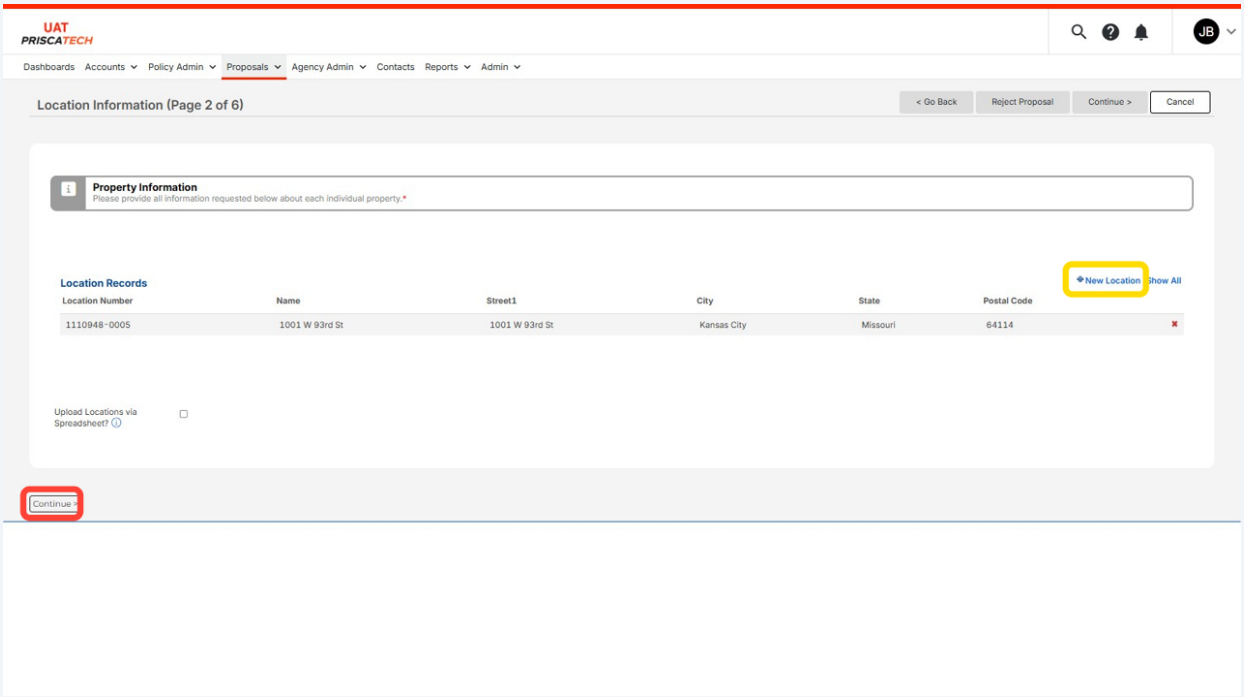


5 Begin typing the address into the Street 1 field, then select the correct location from the dropdown menu, and click 'Save Changes' to proceed.

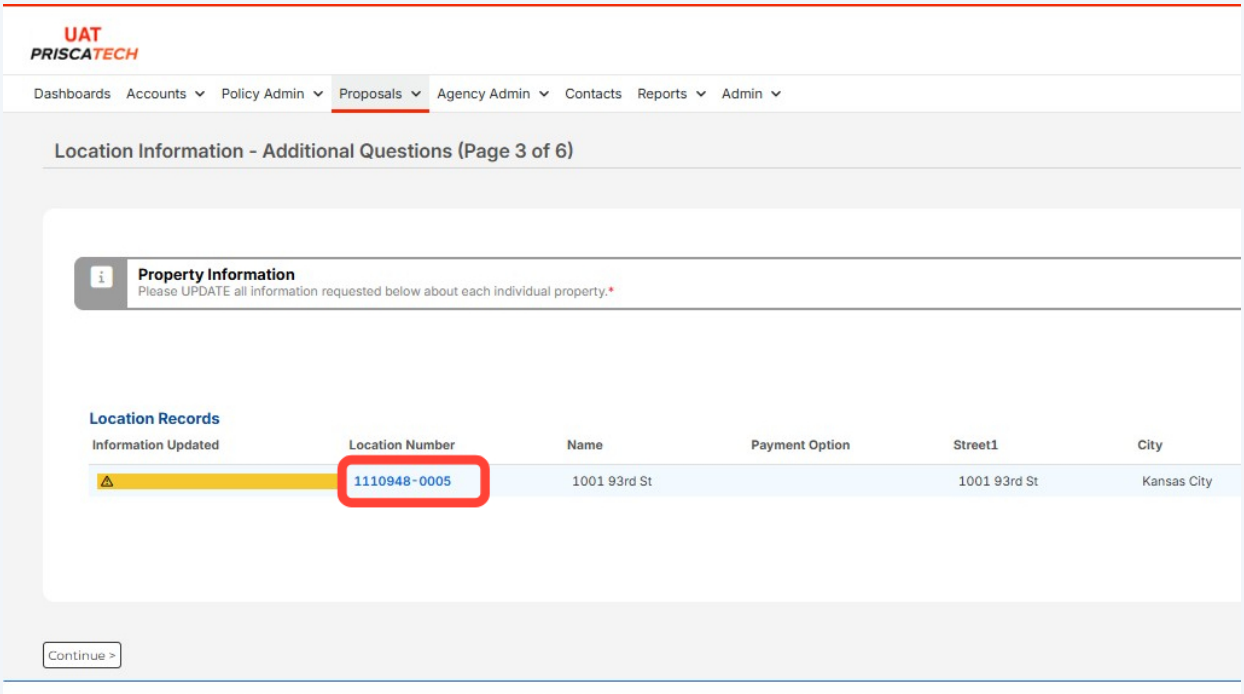




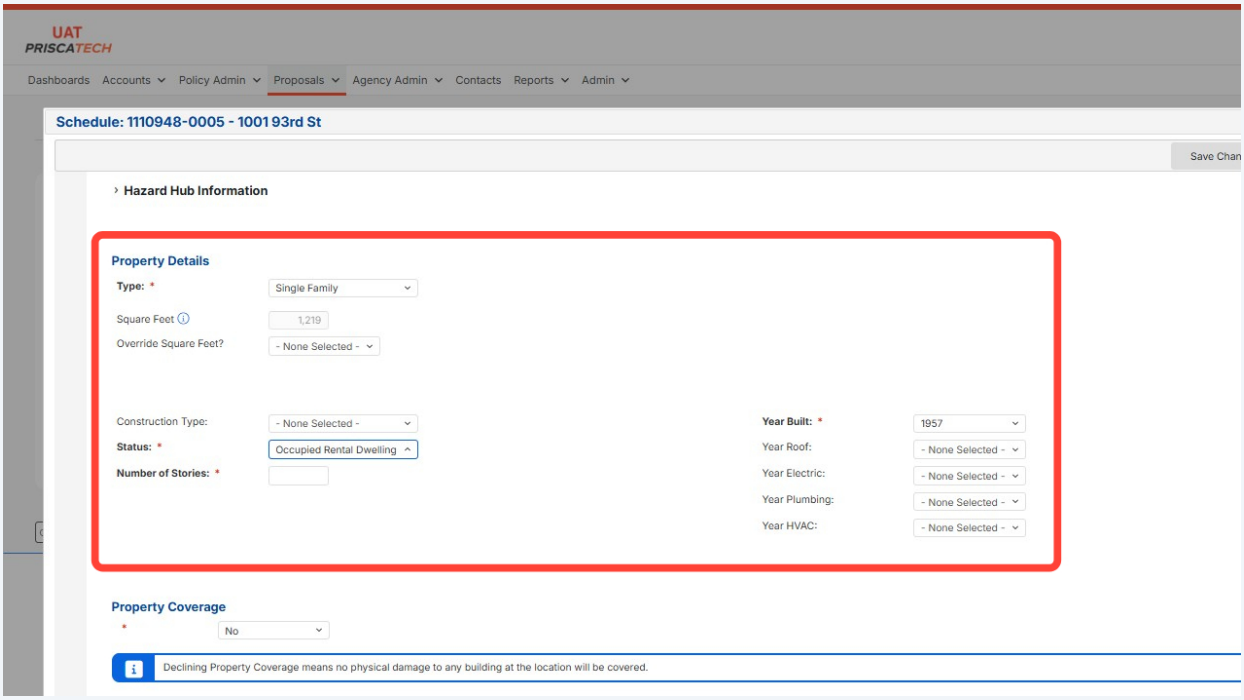
6 Add additional locations, or click 'Continue' to proceed.



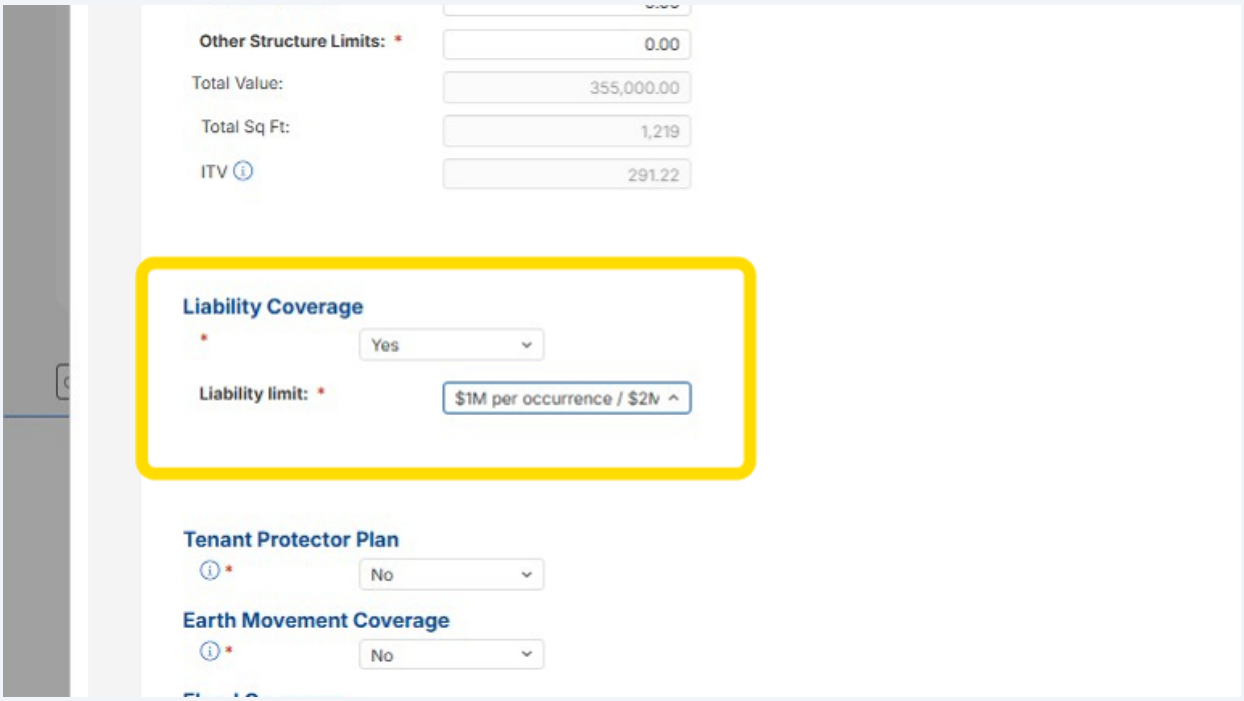
7 Click the 'Location Number' to enter property information.



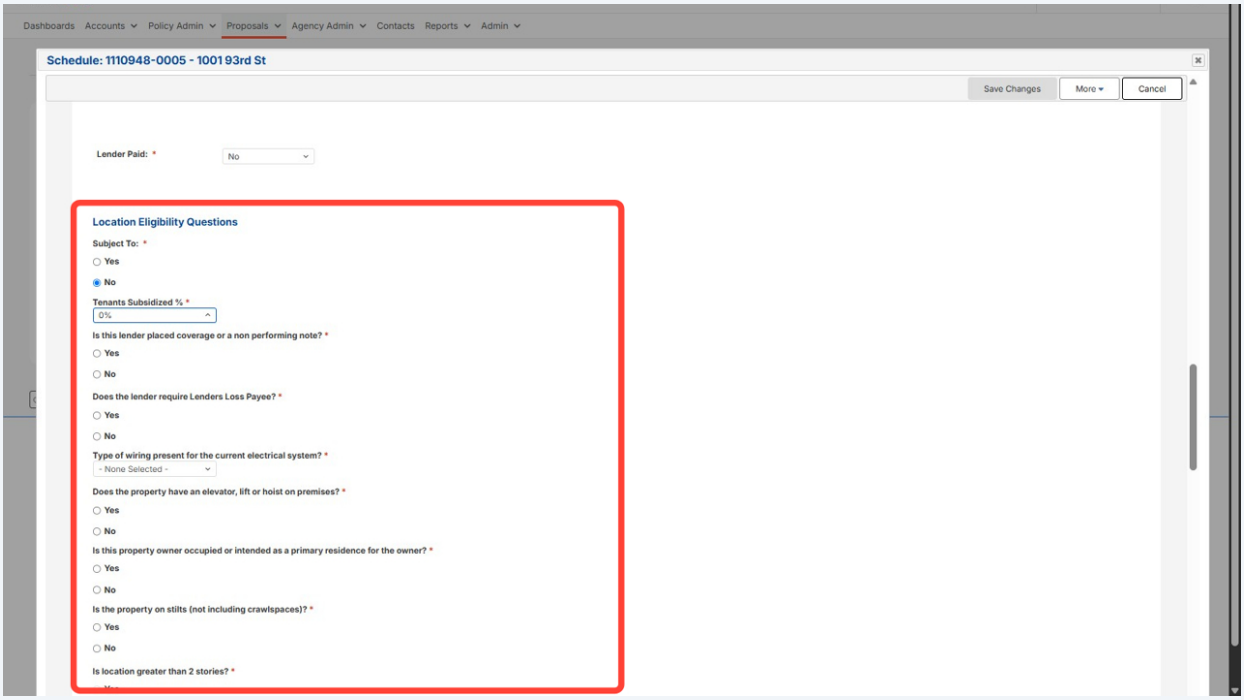
8 Enter the required property details.

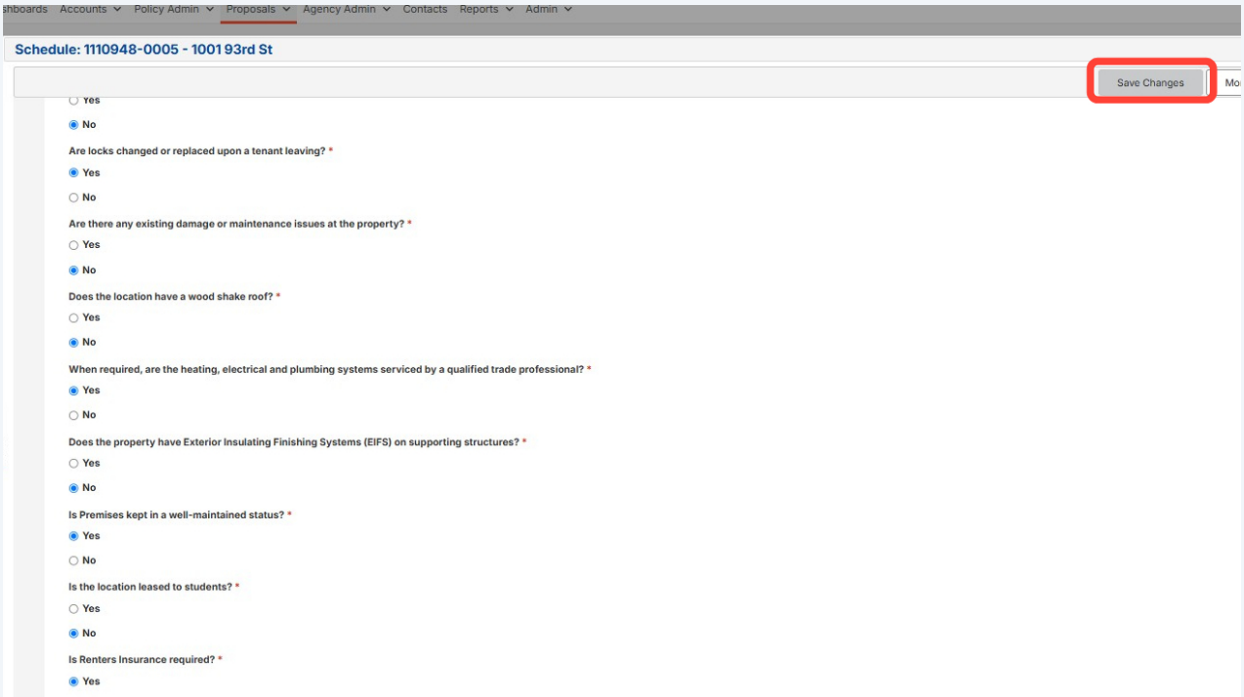


9 To add Liability Coverage, select 'Yes' from the dropdown menu, then choose the appropriate Liability Limit and any applicable Ancillary Coverages.

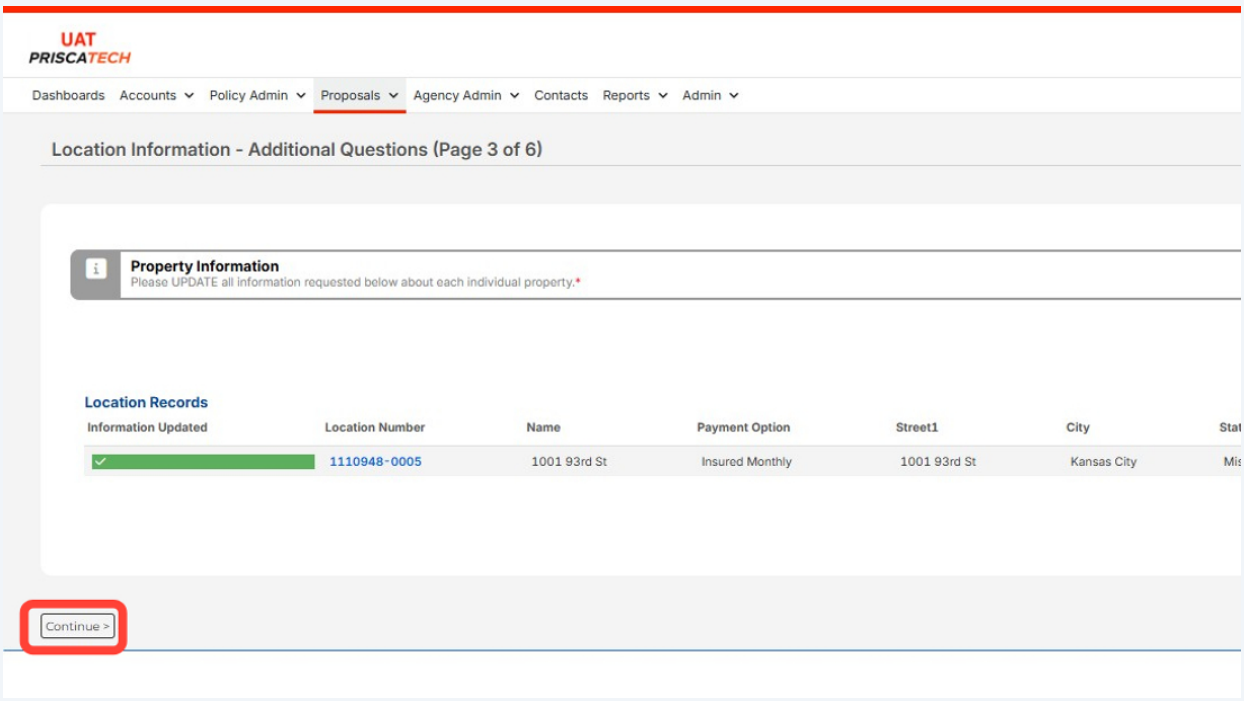


10 Complete both the required and optional Location Eligibility questions, then click 'Save Changes' to proceed.

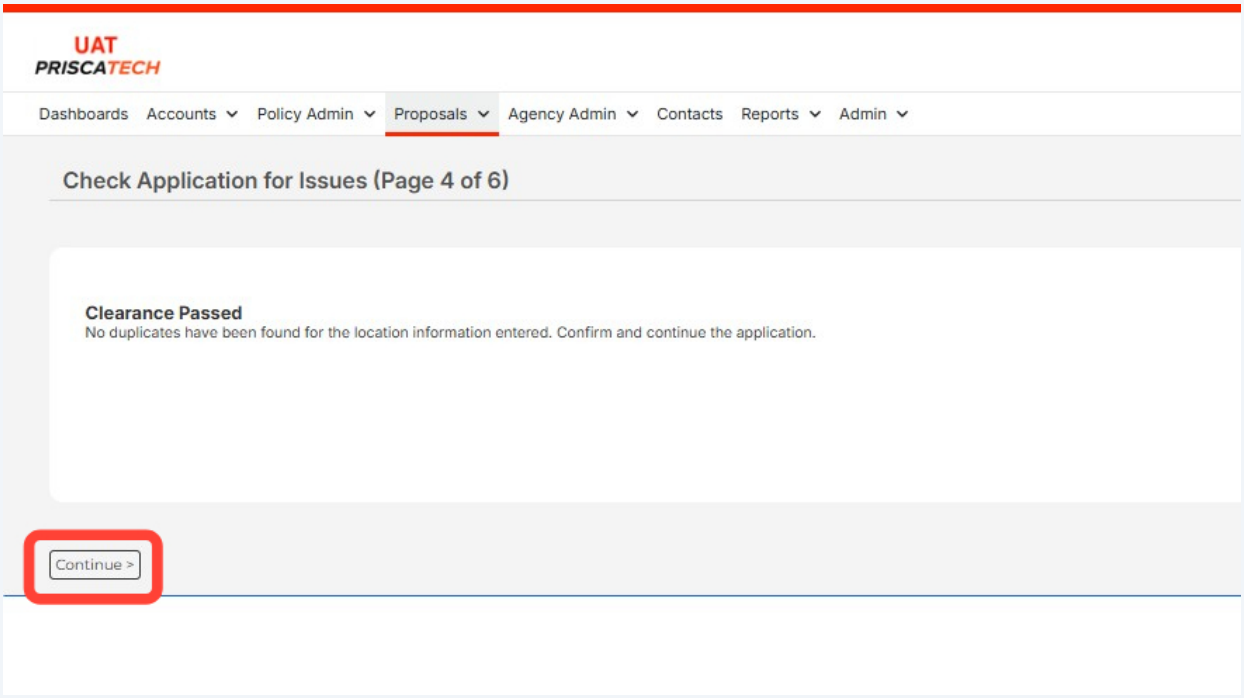




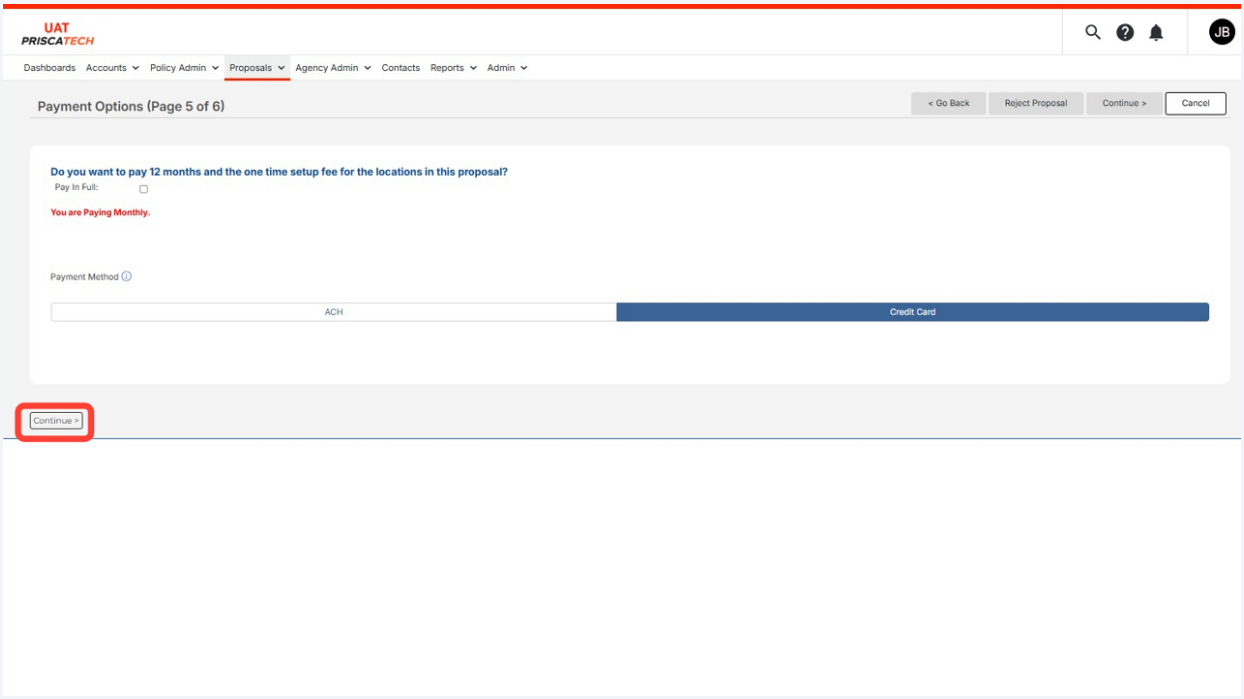
11 After entering all new locations, click 'Continue' to proceed.



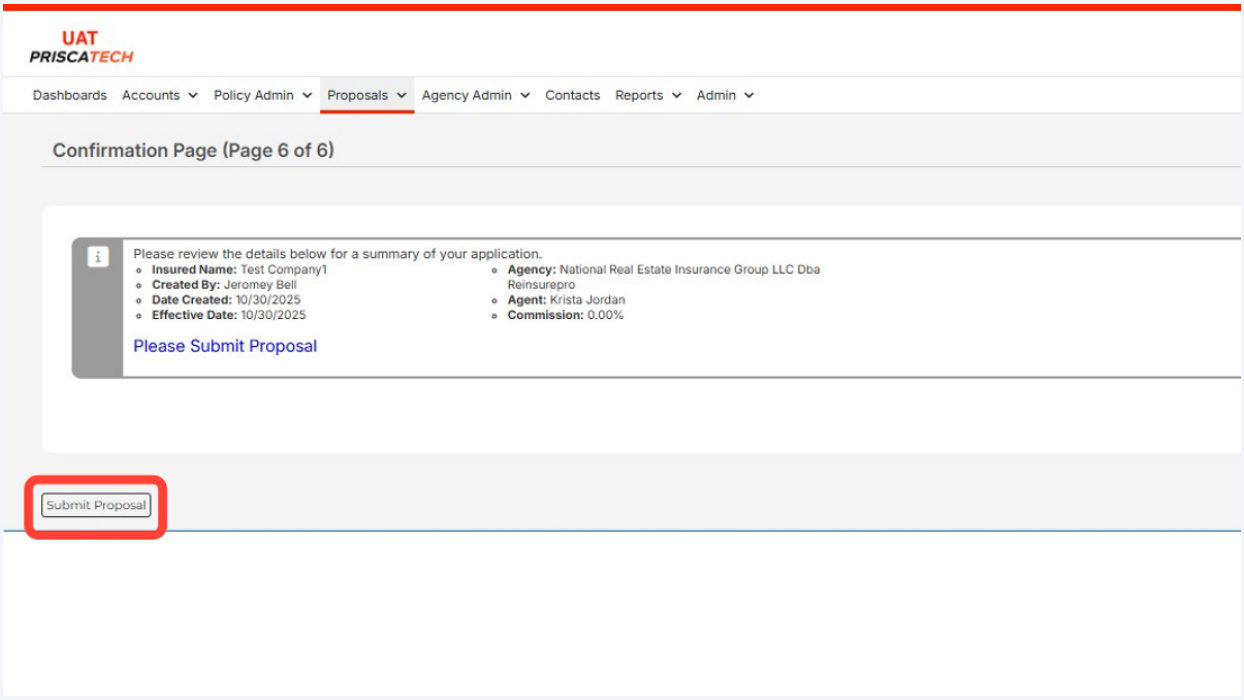
12 The system will check for any duplicate location information. Once the check is cleared, click 'Continue' to proceed.



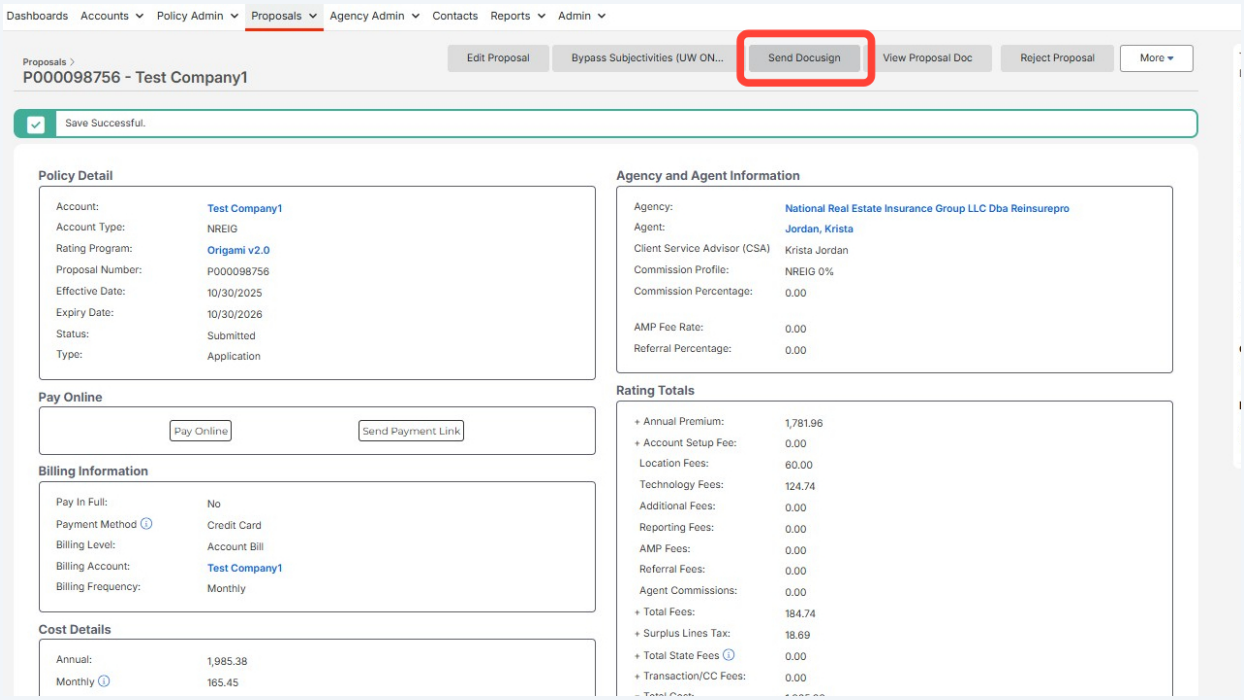
13 Verify and confirm payment method/frequency, then click 'Continue' to proceed.



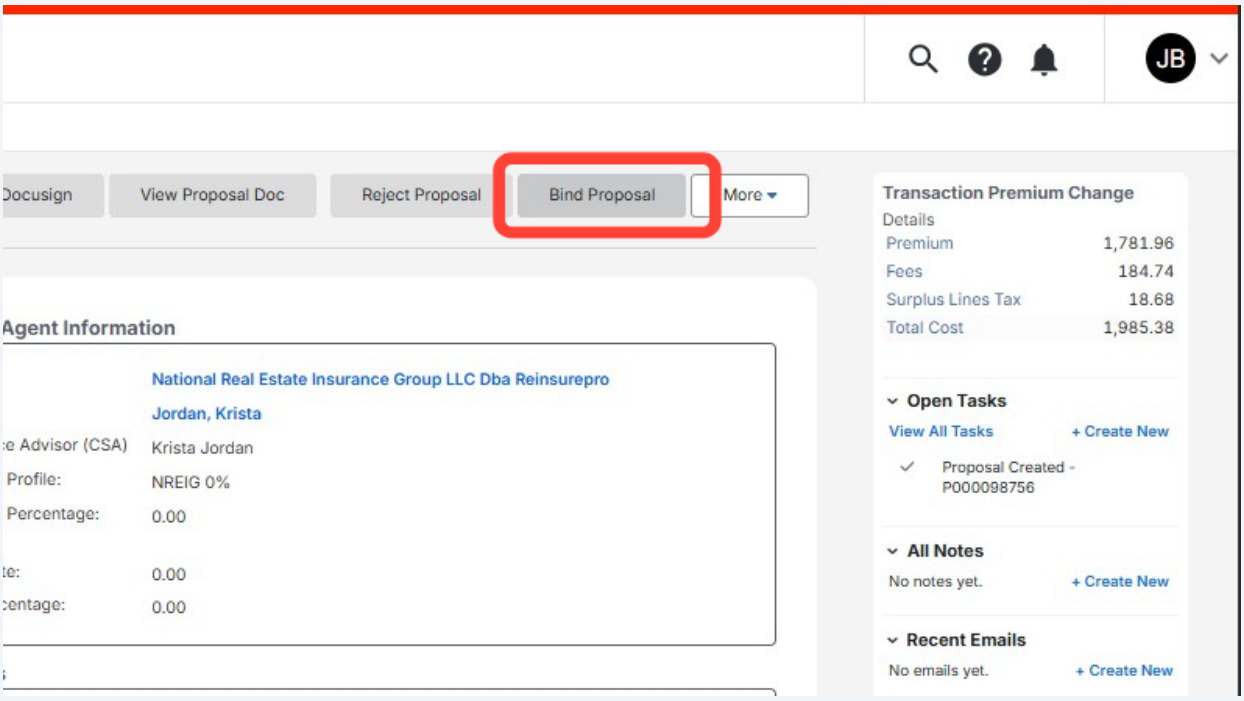
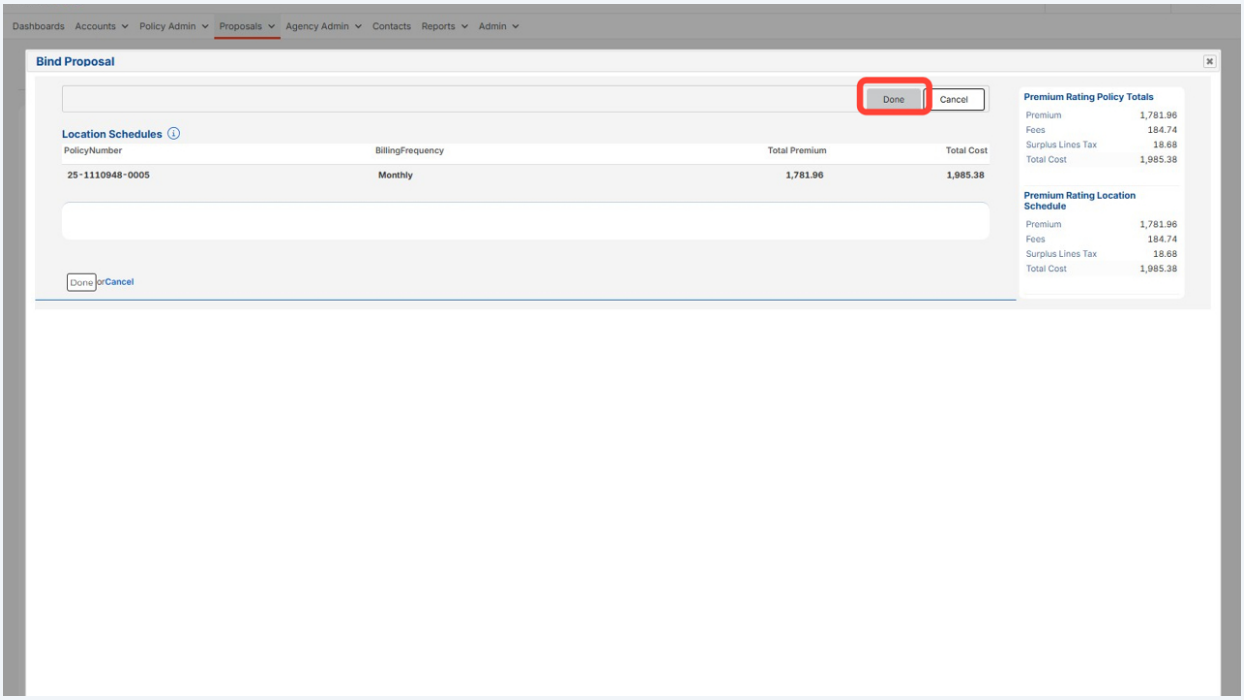
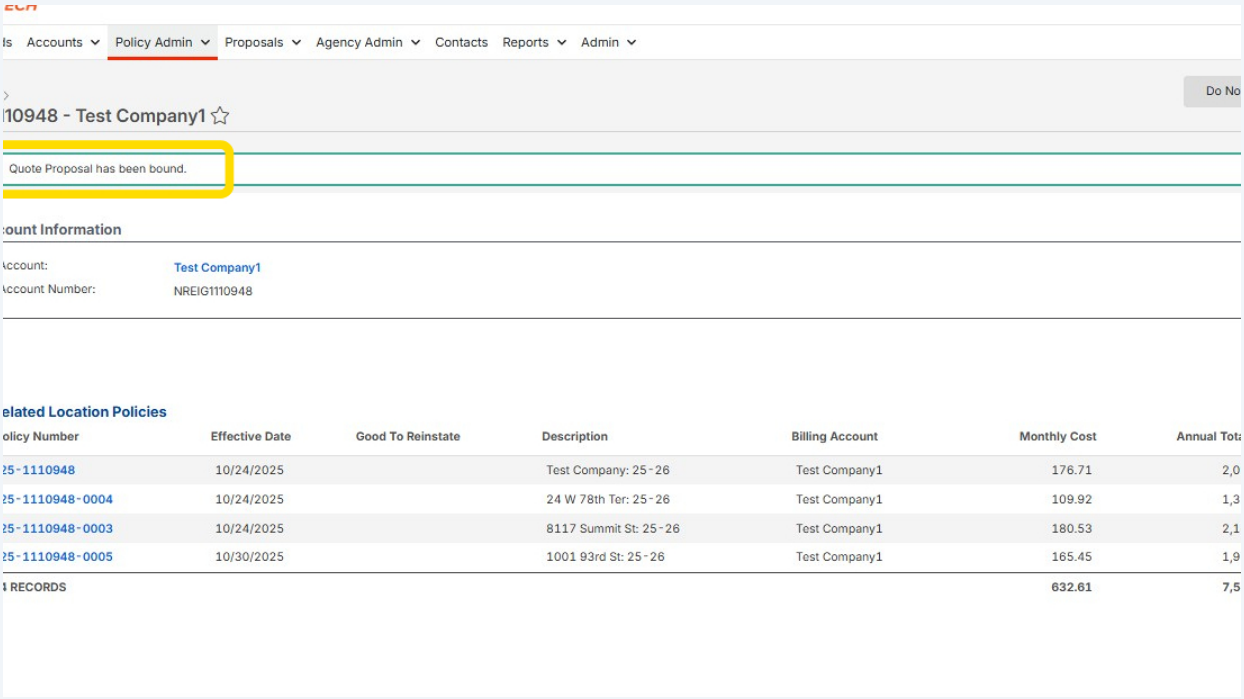
14 Review the location summary, including the total cost, then click 'Submit Proposal' to proceed.



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



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



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