

Adding Location Contact Information to Proposals (Lenders, Property Managers, etc.)



This guide shows how to add and assign roles to location contacts (like property managers, lenders, owners, or additional insureds) on Page 3 of the application, including creating new contacts if needed. It explains saving the contact, choosing one or more applicable roles (e.g., Bill To, Loss Payee, Additional Insured), and verifying the contact appears. It also covers marking whether the lender will pay for the location and the requirement to assign that lender the Bill To role.

- 1
- From the **Proposal** page, navigate to the **Location Schedules** section and select the location to which you need to add an additional contact.

Proposals >

Edit Proposal

Bypass Subjectivities (UW ONLY)

UW Exception Management

Reject Proposal

More

P000140411 - Friday the 13th, LLC

Effective Date:07/15/2026

Expiry Date:07/15/2027

Status:Submitted

Type:Application

SOV Imports?No

Billing Information

Pay In Full:Yes

Payment MethodACH

Billing Level:Account Bill

Billing Account:Friday the 13th, LLC

Billing Frequency:Monthly - Paid in Full

Subjectivities

New Subjectivity

Form	Subjectivity Status	Due By	Received Date
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Location Schedules

Show All

Location Number	BillingLevel	BillingFrequency	Payment Option	Add Date	HH Date	Street1	City	Code	Postal Code	Type	Status	Cause	ITV	Total Value	Coverage Total Cost	Record Fees	Add'l Fee	Tech Fee	Loc Tax	
1137263-0003	Account Bill	Monthly - Paid in Full	Insured Monthly		06/24/2026	15364 N Ramsey Rd	Rathdrum	ID	83858	S	O	B	182.53	560,000.00	12.11	60.00	0.00	0.84	0.00	72

1 RECORDS

Active Coverages

2

Once on the **Location Schedule** page, you have two options for adding an additional contact:

- Click **Edit Location Schedule** to add a contact and make any necessary coverage changes.
- Alternatively, scroll to the **Location Schedule Contacts** section and add the additional contact directly from that area.

Proposals > P000140411 - Friday the 13th, LLC > Location Schedules >

Schedule: 1137263-0003 - 15364 N Ramsey Rd

Edit Location Schedule

More ▾

> Location Eligibility Questions

> Additional Property Questions

> Student Housing Questions

> Billing Information

Location Schedule Contacts

+ New Location Schedule Contact Show All

Name	Contact Type	Title	Email	Work Phone	Role
John, Test	Location Contact		John@test.com		Lender

Location Coverage Schedules

Coverage	Master Policy	Limit	Deductible	Add Date	Remove Date	Number Of Months	Monthly Premium	Annual Premium	Prorated Premium	Monthly Cost	Total Cost
Property				07/15/2026		12	0.00	0.00	0.00	0.00	0.00
Terrorism	Atrium Terrorism 2	\$560,000	\$2,500	07/15/2026		12	1.00	12.00	12.00	1.01	12.11
Liability		\$1M per occurrence / \$2M annual aggregate		07/15/2026		12	0.00	0.00	0.00	0.00	0.00
3 RECORDS							1.00	12.00	12.00	1.01	12.11

3

Use the magnifying glass icon to search for the contact. If you cannot find them, select **Create a New Contact**.

Schedule: 1128141-0001 - 2609 Frontenac Dr

Save Changes More Cancel

Save and Close Save Changes Cancel

If you don't find your contact within the search, select the magnifying glass to see an option to Create New Contact

Contact: * 

Contact Type: - None Selected -

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Use the Name Field to search for your contact, then click the appropriate link from the search results.

If you need to create a new contact, click the New Location Contact button, highlighted in yellow.

New Location Schedule Contact

Contact

New Location Contact

File As	Contact Type	Is Payee	Street1	City	State	Work Phone	Email
HIGHLANDS RESIDENTIAL MORTGAGE LTD ISAOA/ATIMA c/o CENLAR	Location Contact		PO Box 202028	Florence	South Carolina		
The Loan Store Inc., ISAOA	Location Contact		6340 N. Campbell Ave. Suite 100	Tucson	Arizona		
FLAGSTAR BANK ISAOA ATIMA	Location Contact		PO Box 7646	Springfield	Ohio		
PHH Mortgage Services ITS SUCCESSORS AND/OR ASSIGNS ATIMA	Location Contact		P.O. BOX 5954	SPRINGFIELD	Ohio		
Shellpoint Mortgage Servicing	Location Contact		PO Box 7050	Troy	Michigan		
United Wholesale Mortgage ISAOA/ATIMA	Location Contact		PO Box 202028	Florence	South Carolina		
Sierra Palms Properties, LLC	Location Contact		20035 Orchard Meadow Dr.	Saratoga	California		

Filter By

Name

File As

Company Name

Last Name

First Name

Email

Work Phone

State

All

Contact Type

Location Contact

Search Clear

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After entering the new **Location Contact** information, click **Save Changes**. Then select the appropriate **Contact Role**:

- **Property Manager** — Manages the day-to-day operations of the property
- **Lender** — Financial institution providing a loan on the property
- **Additional Interest** — Party with a financial interest in the property, but not insured
- **Land Contract** — Party involved in a land contract or seller-financed agreement
- **Owner** — Legal owner of the property, this will change the Named Insured on all of the documents.
- **Additional Insured** — Party added to the policy for liability protection
- **Loss Payee** — Party entitled to receive claim payments for covered property losses
- **Bill To** — Party responsible for receiving and paying policy invoices

Select all roles that apply for the contact. Then click **Save and Close** to continue.

Schedule: 1128141-0001 - 2609 Frontenac Dr

Save Changes More

Save and Close Save Changes Car

If you don't find your contact within the search, select the magnifying glass to see an option to Create New Contact

Contact: * Contact, Test

Contact Type: Location Contact

Role: *

☒ Property Manager ☐ Lender ☐ Additional Interest ☐ Land Contract

☐ Owner ☐ Additional Insured ☐ Loss Payee ☐ Bill To