Slate Quick Reference

How to Add & View Files

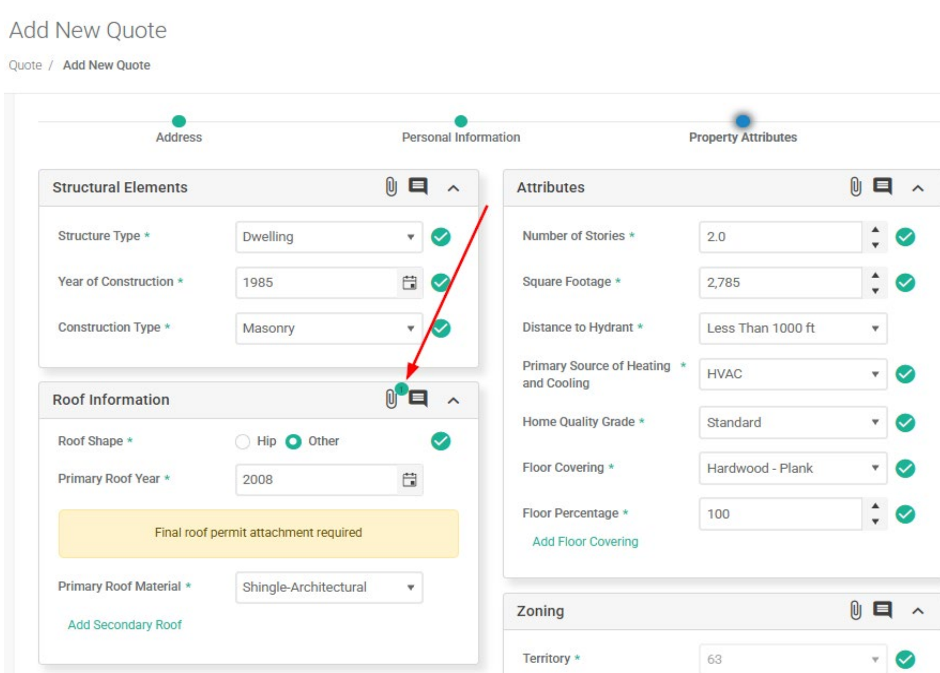
Adding and reviewing Files (attachments) in Slate is quick and easy! Upload or find what you need in Slate by reviewing the topics below.

We're going to cover where to:

- Add a File to a Quote or Submission
- Add a File to a Policy
- Review Attachments for all Policy Terms
- Review Sent Files

To Add a File to a Quote or Submission:

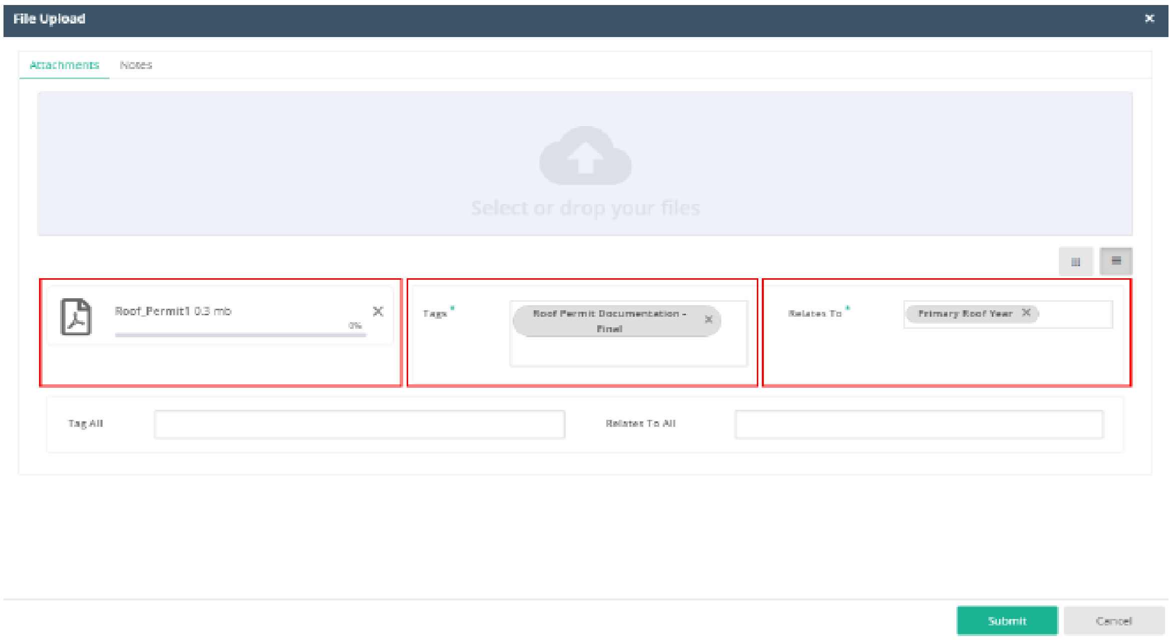
1. During quoting, you can attach any supporting documentation relating to a specific panel by clicking the paperclip icon located within each panel header.
   If you want to add an attachment, add it in the specific panels applicable to the file subject. As an example, you can attach a final roof permit during quoting within the 'Roof Information' panel by clicking the paperclip icon.



   Helpful Note: If you add a file using these icons, it'll transfer to the main **Files f**eature under 'Quote' and will also carry over when requoting.

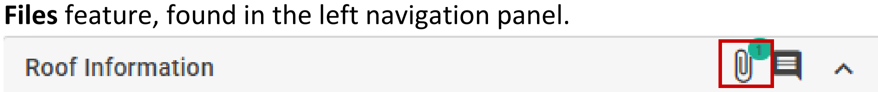
2. Next, click the **Add** icon at the left side of the grid. Then either drag and drop the file you want to upload, or click within the grey box to select a file from your computer.

3. You'll need to add a **Tag**, in this case "Roof Permit Documentation – Final" and then make a selection in the **Relates To** section. The fields within Relates To are specific to the panel you are attaching a document to. In this example, you would select Primary Roof Year.



4. Now, click Submit. You will see a popup display to confirm your attachment. Exit the File Upload screen by clicking the ✕ on the top right side of the popup.

5. You'll now see a counter next to the paperclip icon on the panel to show there is one file attached that relates to that specific panel. You'll also find the file(s) you uploaded in the **Files** feature, found in the left navigation panel.

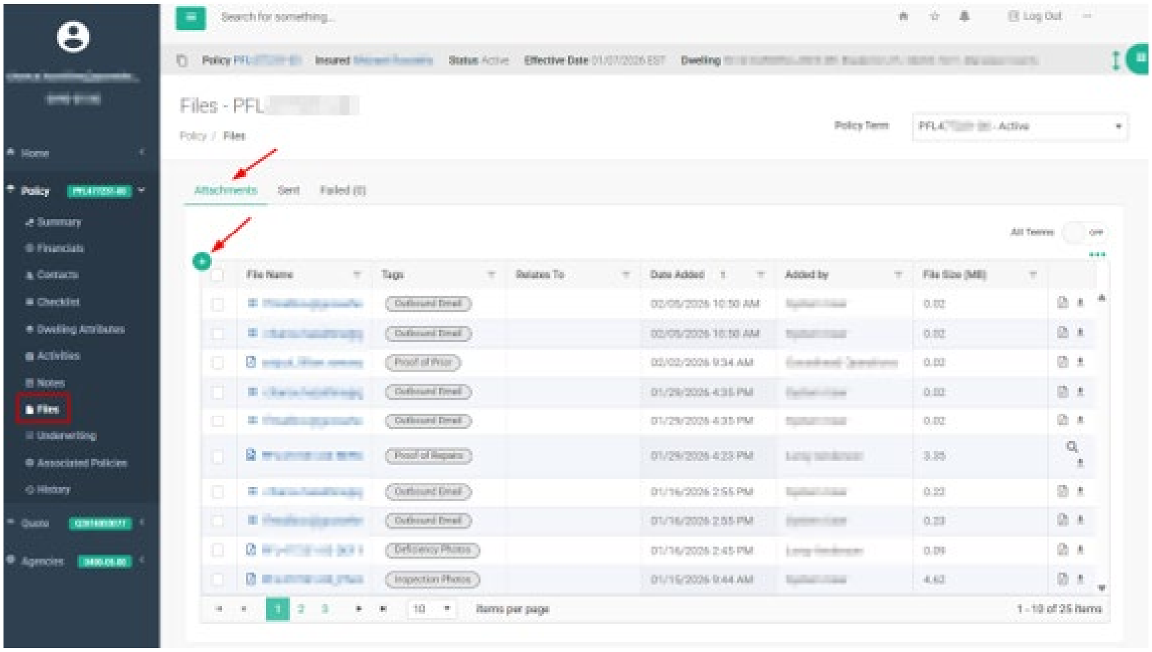


6. All files attached within a quote will transfer to the policy if coverage is bound. They will be located within the **Files** feature of the **Policy** menu option.

To Add a File to a Policy:

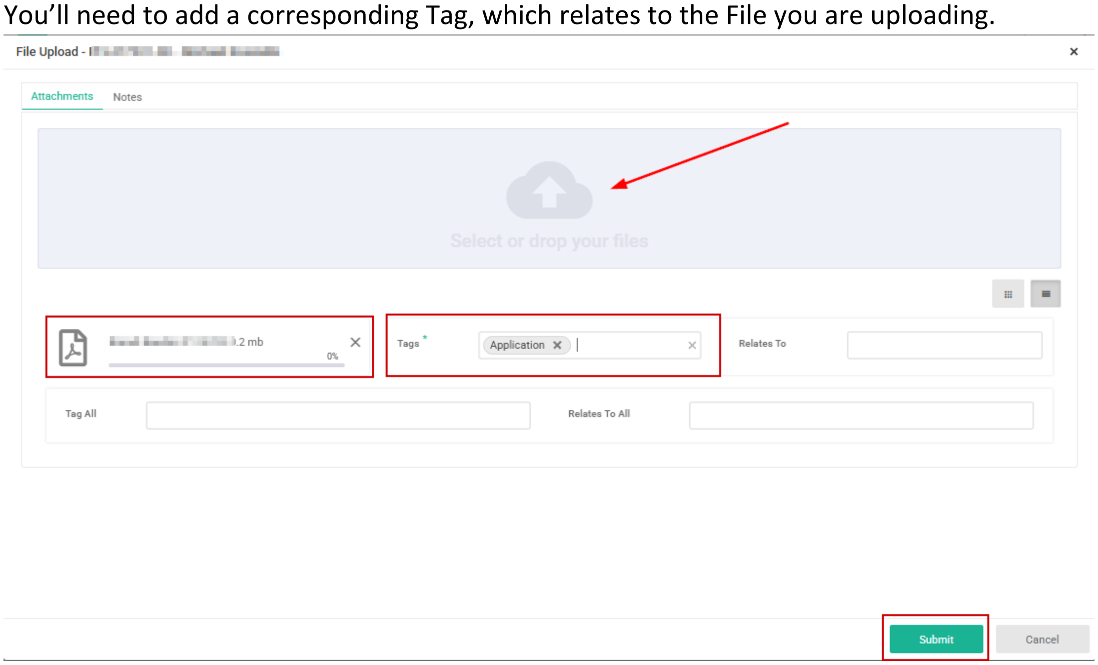
1. Search for a policy and then look on the left navigation menu, expand the **Policy** menu option and click **Files**. The page defaults to the **Attachments** view, which is where any uploaded items (application, emails, repairs, etc.) can be located. All policy attachments on the current term will be displayed, in order of date added.

2. Next, click the Add icon at the top left of the grid.

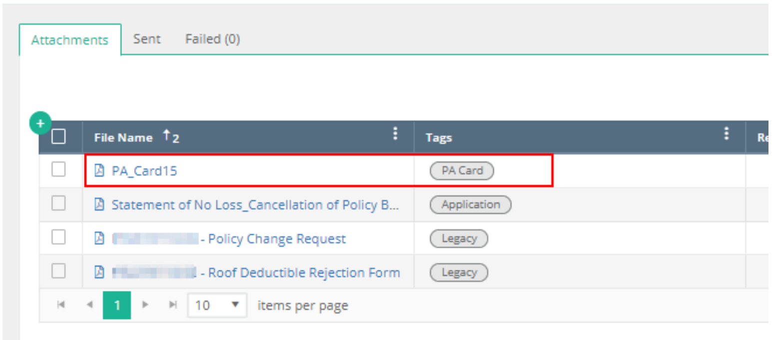


3. A blank File Upload screen will populate for you to either drag and drop the file you want to upload or click within the grey box to select a file from your computer.

4. You'll need to add a corresponding Tag, which relates to the File you are uploading.

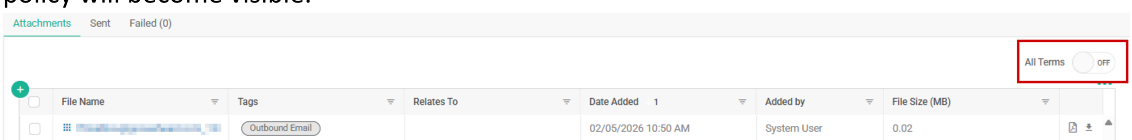


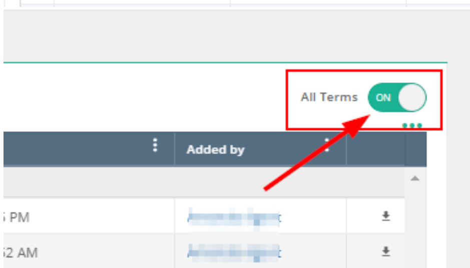
5. Once complete, click **Submit**, Underwriting will be notified via an automatic Slate Activity that you have uploaded a file which requires review.



To Review Attachments for ALL Policy Terms:

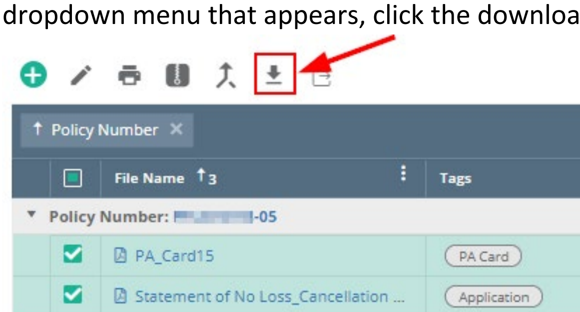
1. While you are in the Files feature, you can also see the Files associated to all policy terms. To do so, toggle the **All Terms** button to ON. All files that have been attached over the life of the policy will become visible.





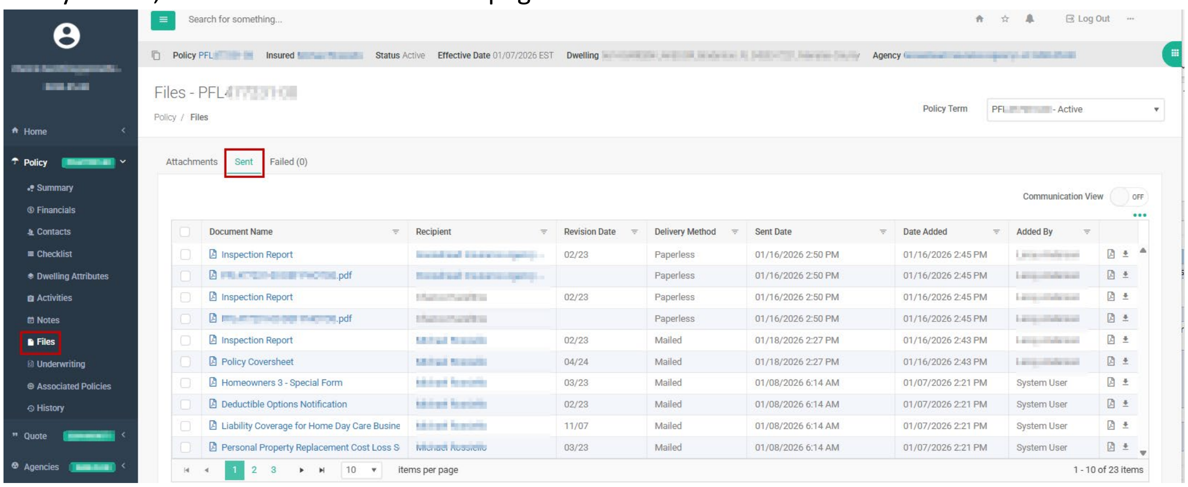
2. You can click on any individual file name within the grid to view it or click the download icon ( ) on the far right to download it to your computer.

3. To download multiple files, check the box ( ) next to the file names to select ( ). In the dropdown menu that appears, click the download icon ( ) to open a separate browser tab.

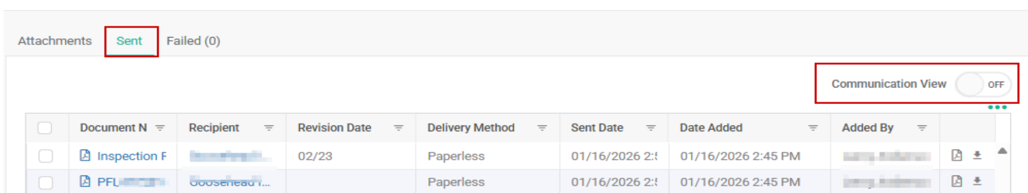


To View Sent Files:

1. Switch from the **Attachments** tab to the **Sent** tab to locate system-generated documents sent either via mail or email, that were sent to the Insured, Mortgagee, and/or Agent for the current term. This includes important policy documents such as the Checklist of Coverage, Policy Jacket, and historical declarations pages.



2. To save any specific documents, click the icon on the right of the grid to view, or the icon to download.



3. Toggle the **Communication View** button to ON in the top right above the grid to see individual communications, via mail or Paperless, grouped by date. To view additional information such as the email address to which an **Action Required** email was sent, click the arrow on the far left of the grid to expand. Each communication may also be viewed in its entirety by clicking the icon on the far right of the grid.