



**Service** Lloyds

Agent Document Management Application Guide

# Document Management

# Document Management Summary

- FasQuote integrates with the document management tool for storing all documents relating to a policy.
- This tool contains the following documents:
  - Policy Documents
  - Endorsement Forms
  - Documentation Uploaded during the quoting process
  - Quote
  - Binder
  - Down Payment Invoice
  - ETC...
- This tool allows you to view and download any document that has been filed with this policy.

To access the document management tool, you will first go to Policy Search and search for a policy.

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INSURANCE COMPANY

RECORDS NEW QUOTE REFERENCES HELP

SELECT TYPE OF RECORDS TO VIEW  
Policy Search

### Policy Search




SEARCH NAME, QUOTE NUMBER, POLICY NUMBER, FEIN EFFECTIVE FROM EFFECTIVE TO [Clear Search](#)

SL00008001234 Search

Search Tools ▲


QUOTE STATUS  
All Policies ▼

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Insured	Type	Status	#	Eff Date	Estimated Cost	Actions
<a href="#">RENEWAL POLICY 1</a>	SL	Inforce	SL00008001234	10/17/2018	\$3,632/\$4,100	  

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

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 You will click on the document button on a policy record to go into the tool.

# This will then take you into the document management tool for this particular policy.

Clients - Client Search Results

Type	Insured Name	Effective Date	Expiration Date	Document Name	Document Name Details	Version #	Document Type
PDF	ROBERTS & LOVEJOY,...	10/07/2018	10/07/2019	POLICY TO AGENT		1	CORRESPONDENCE
PDF	ROBERTS & LOVEJOY,...	10/07/2018	10/07/2019	POLICY		1	POLICY
PDF	ROBERTS & LOVEJOY,...	10/07/2018	10/07/2019	INVOICE		1	INVOICES
PDF	ROBERTS & LOVEJOY,...	10/07/2018	10/07/2019	APPLICATION		1	QUOTE
PDF	ROBERTS & LOVEJOY,...	10/07/2018	10/07/2019	QUOTE		1	QUOTE
PDF	ROBERTS & LOVEJOY,...	10/07/2018	10/07/2019	BINDER		1	QUOTE
PDF	ROBERTS & LOVEJOY,...	10/07/2018	10/07/2019	POLICY REQUEST FRO...		1	CORRESPONDENCE

Each cabinet will show all the policy documents and quote documents

By clicking on a document it will open another window where you can view and print this document.

DocuWare - Google Chrome

Not secure | www.adidocumentconnect.com/DocuWare/Platform/WebClient/Client/Viewer?orgId=1&\_auth=989B242F40B8624E6057...

2/7 POLICY

**WORKERS COMPENSATION AND EMPLOYERS LIABILITY INSURANCE POLICY** WC 00 00 01 A  
Information Page

1. The Insured: Roberts & Lovejoy, PC

Mailing address: 102 Greenville St.  
LaGrange, GA 30240

Other workplaces not shown above: See Schedule

2. Policy Period: From 10/07/2018 To 10/07/2019 12:01 A.M. standard time at the insured's mailing address.

3. A. Workers Compensation Insurance: Part One of the policy applies to the Workers Compensation Law of the states listed here: GA

Policy No. FCWC10506100

Renewal of: NEW

Individual  Partnership

Corporation or

Federal Employers I.D.# See Schedule

Inter/Intrastate Risk I.D.# 000000

Other I.D. # \_\_\_\_\_

Once the document is open, if you wish to download or print this document, click on the toolbar arrow key and then the required function under the tool section.

Tool bar arrow key

You will then have different options like to download and print the document.

The screenshot shows a web browser window titled "DocuWare - Google Chrome" displaying a document from "www.adidocumentconnect.com". The document is titled "WORKERS COMPENSATION AND EMPLOYERS' LIABILITY INSURANCE POLICY" issued by "SERVICE LLOYDS INSURANCE COMPANY". The document content includes policy details such as "NEW POLICY NUMBER: WC0004822-2018A", "RENEWAL OF NUMBER: WC0004822-2017A", and "ITEM INFORMATION PAGE" with details for the insured, including name and address. It also lists "Other Work Places" and "Insured is Limited Partnership". A table of liability limits is provided, showing \$500,000 per accident for Bodily Injury by Accident and \$500,000 per policy limit for Bodily Injury by Disease. The document concludes with a note that the premium will be determined by the company's manuals and a table for classifications and rates.

Classifications	Code No.	Premium Basis Total Estimated Annual Renewation	Rate per \$100 of Renewation	Estimated Annual Premium
See Next Page				