

Upload Auto Policy Documents for a Client

1

Navigate to <https://app.fpalpha.com/advisor/clients>

Clients

Client list summary

Household

0

Business owners

0

Retired

0

Average Net worth

\$0

Company credits

Tax planning

Unlimited credits

Home insurance

1 Requested 14 Remaining

Estate planning

1 Requested 29 Remaining

Auto insurance

0 Requested 15 Remaining

Renewal date Feb 05, 2026

Favorite clients

Henry C. & Mary Price

⊕ Add new client

Filter

Name	Net Worth	Tax Planning	Estate Planning	Home Insurance	Auto Insurance	Last view	
★  Henry C. & Mary Price Demo client	\$14,000,000	Tax year 2023 	Processing 	Processing 	Policy 	Aug 1, 2025 09:50	
 John E Adamson Demo client	\$9,000,000.00	Tax year 2022 	Snapshot 	Snapshot 	Snapshot 		

30



2 Click on your client file

The screenshot shows a dashboard with a sidebar on the left containing icons for Clients, Client Dashboard, Data & Documents, Snapshots, Insights, Task manager, Simulators, and Reports. The main area is titled 'You are now in your client list'. It features a 'Client list summary' card with a 'Household' icon and statistics: Business owners 0, Retired 0, and Average Net worth \$0. To the right is a 'Company credits' card showing progress bars for Tax planning (Unlimited credits), Home insurance (1 Requested, 14 Remaining), Estate planning (1 Requested, 29 Remaining), and Auto insurance (0 Requested, 15 Remaining). A 'Favorite clients' card lists 'Henry C. & Mary Price'. Below these is a table of clients with a red circle around the first row.

Name	Net Worth	Tax Planning	Estate Planning	Home Insurance	Auto Insurance	Last view
★ Henry C. & Mary Price Demo client	\$14,000,000	Tax year 2023	Processing	Processing	Policy	Aug 1, 2025 09:50
John E Adamson Demo client	\$9,000,000.00	Tax year 2022	Snapshot	Snapshot	Snapshot	

3 Click "Data & Documents"

The screenshot shows the 'Data & Documents' page for the client 'Henry C. & Mary Price' (44%/100%). The page is divided into two columns for 'Henry C. Price' (Male, 39, Business owner, Actuary at Metlife) and 'Mary Price' (Female, 37, Same Address). Below this is a 'Household Summary' card showing a Net-Worth of \$14,000,000 and an Optimization Level of 44/100%. It also lists 'Married', '3 Children', and 'Oregon'. The bottom section, 'Analysis By Area', includes a 'Tax Planning' card with a 72%/100% progress bar and 3 tasks to complete, and a table of tax details.

Tax Return year	Filing Status	Adjusted Gross Income	Federal Tax Bracket
2024	Married Filing Jointly	0	10%

4 Click "Upload Policy Documents"

The screenshot shows the 'Client Dashboard' with a sidebar on the left containing icons for Client Dashboard, Data & Documents, Snapshots, Insights, Task manager, Simulators, and Reports. The main content area is divided into two sections. The top section, 'General Questionnaire', has a table with columns: Last updated, Personal Info, Family, and Assets. The bottom section, 'Area', has a table with columns: Documents uploaded, Upload date, Snapshot generated, and Insights generated. The 'Auto Insurance' row in the bottom table has the 'Upload Policy Documents' button highlighted with an orange circle.

Area	Documents uploaded	Upload date	Snapshot generated	Insights generated
Tax Planning	Tax year 2023.pdf	02/04/2025	✓ Tax year 2023	✓ Instant
Estate Planning	Matt & Karen Bolton - Estate Snapshot Report.pdf	08/01/2025	Processing ⓘ	Processing ⓘ
Home Insurance	Johns Home.pdf Johns Umbrella.pdf	08/01/2025	Processing ⓘ	Processing ⓘ
Auto Insurance	Upload Policy Documents	-	-	-
Life Insurance	Access Questionnaire	-	-	-

5 Click "Add Auto"

The screenshot shows the 'fpalpha' application interface. The top navigation bar includes the 'fpalpha' logo, a 'Go back to Data & Documents' link, and a 'Go to Client Dashboard' button. The main content area is titled 'Auto Insurance Data' and features two tabs: 'Upload Documents' (active) and 'Property Data'. Below the tabs, there is a section for 'Upload documents auto insurance for Henry C. & Mary Price ⓘ'. Under the 'Auto Policy' heading, the 'Add Auto' button is highlighted with an orange circle. On the right side, there are three summary boxes: 'Snapshot Requests' (Ready), 'Available requests' (3 Remaining today), and 'Company credits' (15 Remaining). A 'See upload details' link is also present.

fpalpha

Go back to Data & Documents Go to Client Dashboard

Auto Insurance Data

Upload Documents Property Data

Upload documents auto insurance for Henry C. & Mary Price ⓘ

Auto Policy Add Auto

Snapshot Requests Ready Available requests 3 Remaining today Company credits 15 Remaining See upload details

6 Type "New Car" (or any other description)

7 Click "Add"

The screenshot shows a web application interface for uploading documents for auto insurance. At the top, there are tabs: 'Upload Documents' (active), 'Property Data', and 'Ready'. To the right, there are status indicators: '3 Remaining today' and '15 Remaining'. Below the tabs, the main heading is 'Upload documents auto insurance for Henry C. & Mary Price'. Under this, there is a section for 'Auto Policy' with a button '+ Add Auto'. A modal window titled 'Add new car' is open in the center. It has a close button (X) in the top right corner. Inside the modal, there is a label 'Name' above a text input field containing 'New Car'. At the bottom of the modal, there are two buttons: 'Cancel' and 'Add'. The 'Add' button is highlighted with an orange circle. In the bottom right corner of the main interface, there is a small icon with the number '30' and a question mark.

 You can repeat this process to add multiple vehicles

8 Click "Upload" and choose the Auto Insurance Policy

Ready

3 Remaining today

15 Remaining

See upload details

Upload Documents

Property Data

Upload documents auto insurance for Henry C. & Mary Price ⓘ

⚠ You have not uploaded a policy for 2 auto(s). Please upload the missing files to continue.

Auto Policy

+ Add Auto

New Car

✎

Upload

Auto Policy in PDF

Last upload

Henry-auto.pdf

Date 02/04/2025 ⓘ

Delete

Security Policy

Confirm documents

30 ?

9 Click "Confirm documents"

Ready

3 Remaining today

15 Remaining

See upload details

Upload Documents

Property Data

Upload documents auto insurance for Henry C. & Mary Price ⓘ

⚠ You have not uploaded a policy for 1 auto(s). Please upload the missing files to continue.

Auto Policy

+ Add Auto

New Car

✎

Replace

Johns Home.pdf

Last upload

Henry-auto.pdf

Date 02/04/2025 ⓘ

Delete

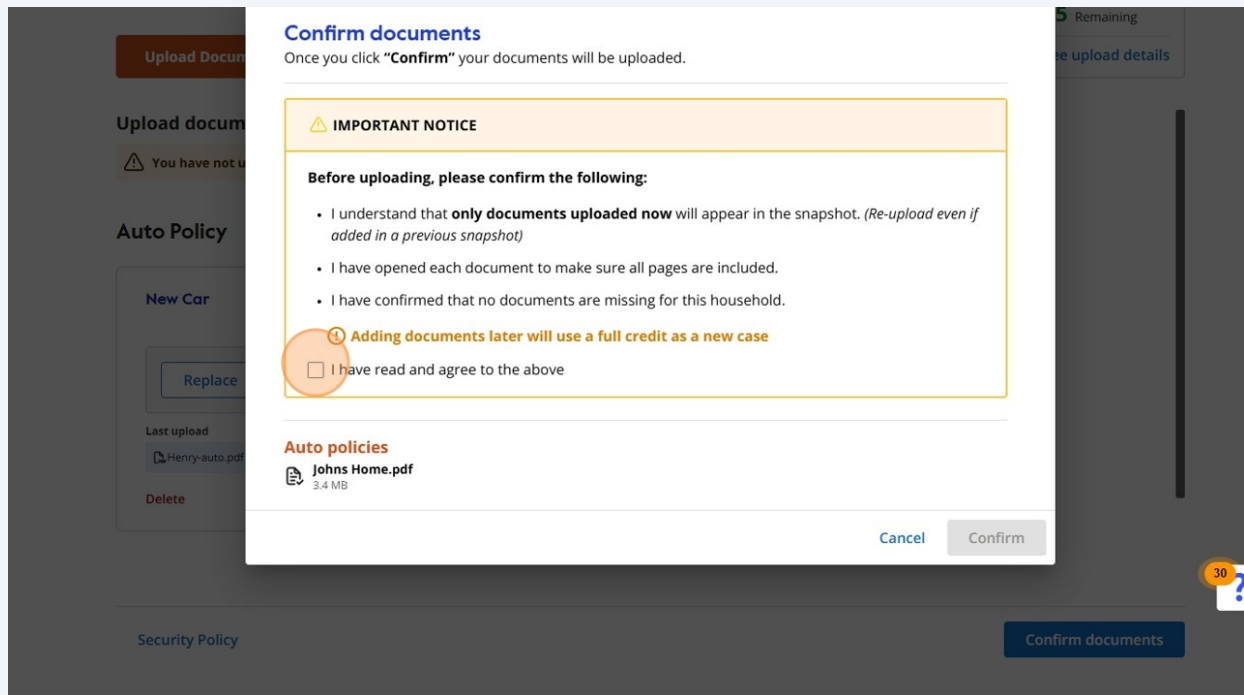
Security Policy

Confirm documents

30 ?

10

Review the Important Notice and check the "I have read and agree to the above" box



11

Click "Confirm"

