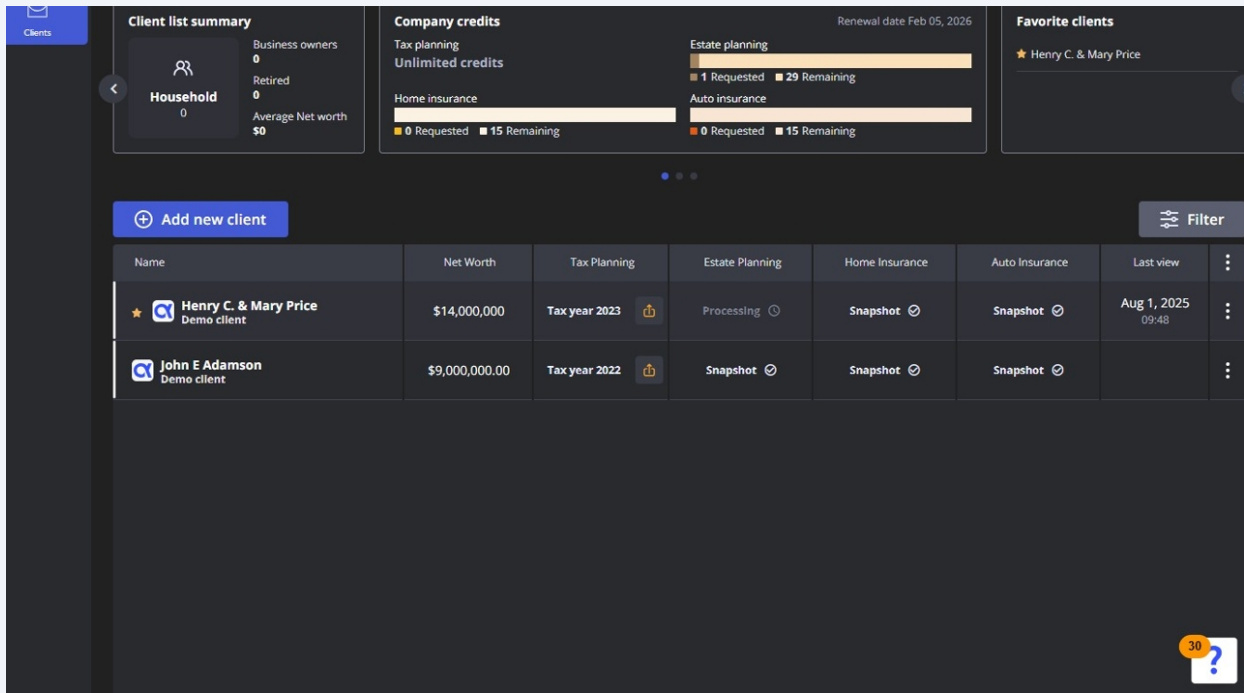


Upload and Link Home and Umbrella Policy Documents

1 Navigate to <https://app.fpalpha.com/>



The screenshot displays the fp alpha app dashboard. At the top, there's a 'Client list summary' section with a 'Household' icon and '0' clients. Below this, a 'Company credits' section shows 'Tax planning' and 'Unlimited credits' with a progress bar. To the right, 'Estate planning' and 'Auto insurance' sections show progress bars. A 'Favorite clients' section lists 'Henry C. & Mary Price'. Below these, a table lists clients with columns for Name, Net Worth, Tax Planning, Estate Planning, Home Insurance, Auto Insurance, and Last view. The table includes two demo clients: 'Henry C. & Mary Price' and 'John E Adamson'. A 'Filter' button is located at the top right of the table. A '30' badge is visible in the bottom right corner.

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 	Snapshot 	Snapshot 	Aug 1, 2025 09:48
 John E Adamson Demo client	\$9,000,000.00	Tax year 2022 	Snapshot 	Snapshot 	Snapshot 	

2 Click on your client file

The screenshot shows a dashboard with a sidebar on the left containing a 'Clients' icon. The main area is titled 'You are now in your client list'. It features a 'Client list summary' card on the left 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 (0 Requested, 15 Remaining), Estate planning (1 Requested, 29 Remaining), and Auto insurance (0 Requested, 15 Remaining). A 'Favorite clients' card on the far right lists 'Henry C. & Mary Price'. Below these cards is a table with columns: Name, Net Worth, Tax Planning, Estate Planning, Home Insurance, Auto Insurance, and Last view. The table lists two clients: 'Henry C. & Mary Price' (Net Worth: \$14,000,000, Tax year 2023, Processing) and 'John E Adamson' (Net Worth: \$9,000,000.00, Tax year 2022, Snapshot). A red circle highlights the 'Henry C. & Mary Price' client file in the table.

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	Snapshot	Snapshot	Aug 1, 2025 09:48
John E Adamson Demo client	\$9,000,000.00	Tax year 2022	Snapshot	Snapshot	Snapshot	

3 Click "Data & Documents"

The screenshot shows the client profile page for 'Henry C. & Mary Price' with a progress indicator of 56%/100%. The page is divided into two columns: 'Henry C. Price' (Male, 39, Business owner, Actuary at Metlife) and 'Mary Price' (Female, 37, Same Address). Below these is a 'Household Summary' card showing a Net-Worth of \$14,000,000, an Optimization Level of 56 / 100%, and details: Married, 3 Children, Oregon. The bottom section is 'Analysis By Area' with a 'Tax Planning' card showing 72% / 100% completion (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 '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 'Home 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	Upload Policy Documents	-	-	-
Auto Insurance	Upload Policy Documents	-	-	-
Life Insurance	Access Questionnaire	-	-	-

5 Click "Add Home"

The screenshot shows the 'Home Insurance Data' page. At the top, there's a header with 'fp alpha' and two buttons: 'Go back to Data & Documents' and 'Go to Client Dashboard'. Below the header, there's a section for 'Home Insurance Data' with two tabs: 'Upload Documents' (active) and 'Property Data'. To the right, there are three boxes: 'Snapshot Requests' (Ready), 'Available requests' (3 Remaining today), and 'Company credits' (15 Remaining). Below these, there's a button 'See upload details'. The main content area has a heading 'Upload documents home insurance for Henry C. & Mary Price ⓘ'. Below this, there are two sections: 'Home Policy' and 'Umbrella Policy'. The 'Home Policy' section has a button 'Add Home' highlighted with an orange circle. The 'Umbrella Policy' section has a button 'Add Umbrella'.

6 Type "Primary Residence" (or any other description)

7 Click "Add"

The screenshot displays a web application interface for uploading documents. At the top, there are tabs for 'Upload Documents' and 'Property Data'. Below these, a header reads 'Upload documents home insurance for Henry C. & Mary Price'. The main content area is titled 'Home Policy' and features a '+ Add Home' button. A modal window titled 'Add new property' is open, showing a 'Name' field with the text 'Primary Residence' and two buttons: 'Cancel' and 'Add'. The 'Add' button is highlighted with an orange circle. In the background, there are status indicators: 'Ready', '3 Remaining today', and '15 Remaining'. A 'See upload details' link is also visible. At the bottom right, there is a '30?' icon and a 'Confirm documents' button.

i Repeat this process to add multiple homes

8 Click "Upload" and choose the Home Insurance Policy

Ready | 3 Remaining today | 15 Remaining | [See upload details](#)

Upload Documents | **Property Data**

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

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

Home Policy

[+ Add Home](#)

Primary Residence [✎](#)

Upload | Home Policy in PDF

Last upload

Henry-home-primary-residen... **Date** 02/04/2025 ⓘ

[Delete](#)

Umbrella Policy

[+ Add Umbrella](#)

[Security Policy](#) | [Confirm documents](#)

30 ?

9 Click "Add Umbrella"

palpha

[Go back to Data & Documents](#) | [Go to Client Dashboard](#)

Home Insurance Data

Upload Documents | **Property Data**

Snapshot Requests: Ready | Available requests: 3 Remaining today | Company credits: 15 Remaining | [See upload details](#)

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

Home Policy

[+ Add Home](#)

Primary Residence [✎](#)

[Replace](#) | Johns Home.pdf

Last upload

Henry-home-primary-residen... **Date** 02/04/2025 ⓘ

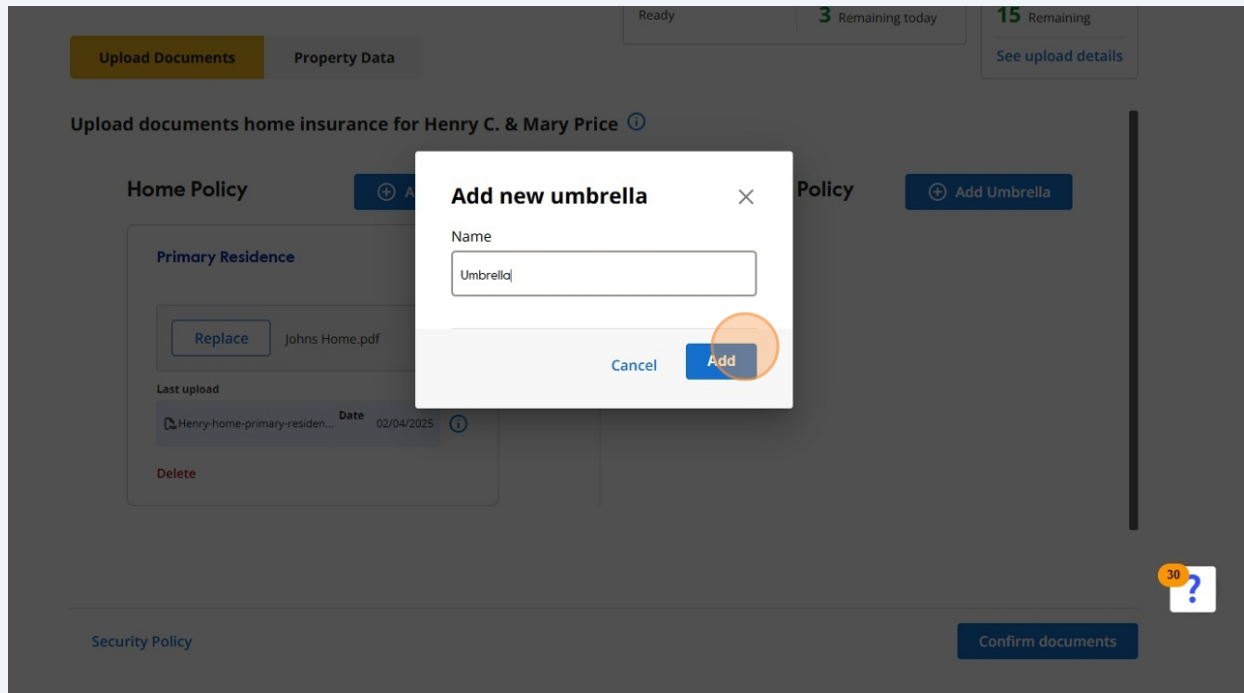
[Delete](#)

Umbrella Policy

[+ Add Umbrella](#)

10 Type "Umbrella" (or any other description)

11 Click "Add"



12 Click "Upload" and choose the Umbrella Insurance Policy

Ready

3 Remaining today

15 Remaining

See upload details

Upload Documents

Property Data

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

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

Home Policy

+ Add Home

Primary Residence

✎

Replace

Johns Home.pdf

Last upload

Henry-home-primary-residen...

Date

02/04/2025

ⓘ

Delete

Umbrella Policy

+ Add Umbrella

Umbrella

Step 1. Upload umbrella policy

Step 2. Link all properties associated with this policy

Upload

Umbrella Policy in PDF

Last upload

Henry-umbrella.pdf

Date

02/04/2025

ⓘ

+ Link home

Security Policy

Confirm documents

30 ?

13 Click "Link home"

Ready

3 Remaining today

15 Remaining

See upload details

Upload Documents

Property Data

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

Home Policy

+ Add Home

Primary Residence

✎

Replace

Johns Home.pdf

Last upload

Henry-home-primary-residen...

Date

02/04/2025

ⓘ

Delete

Umbrella Policy

+ Add Umbrella

Umbrella

Step 1. Upload umbrella policy

Step 2. Link all properties associated with this policy

Replace

Johns Umbrella.pdf

Last upload

Henry-umbrella.pdf

Date

02/04/2025

ⓘ

+ Link home

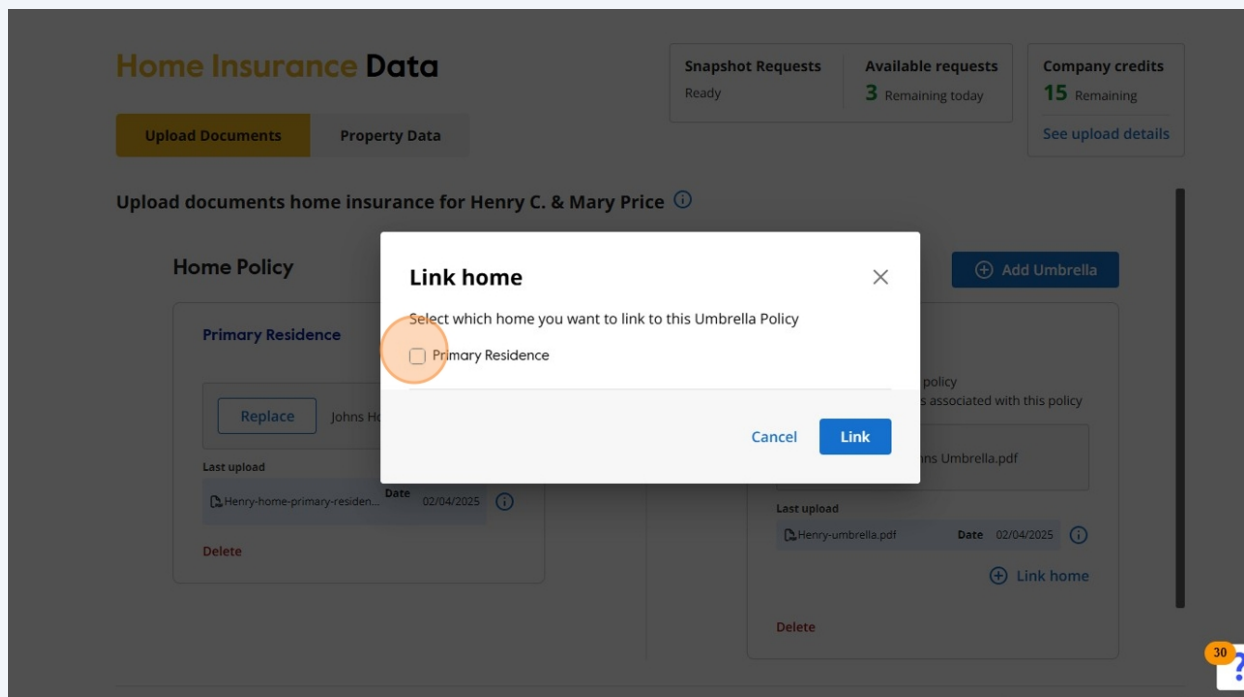
Security Policy

Confirm documents

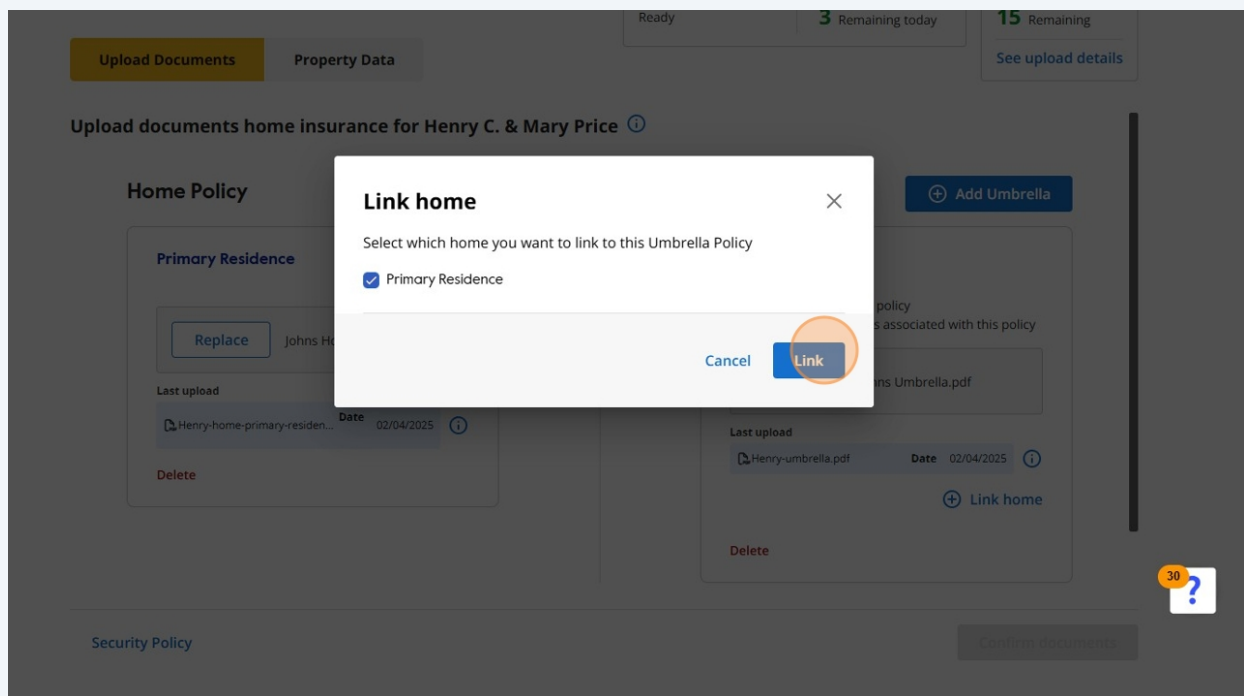
30 ?

7

14 Select all homes this Umbrella policy applies to



15 Click "Link"



16 Click "Confirm documents"

The screenshot shows the 'Upload Documents' interface. At the top, there are tabs for 'Upload Documents' (active) and 'Property Data'. On the right, a progress bar shows 'Ready', '3 Remaining today', and '15 Remaining'. Below the progress bar is a 'See upload details' link. The main area is divided into two columns: 'Home Policy' and 'Umbrella Policy'. Each column has an 'Add' button and a 'Replace' button. The 'Home Policy' section shows a 'Primary Residence' card with a 'Replace' button and a 'Last upload' section showing 'Henry-home-primary-residen...' with a date of '02/04/2025'. The 'Umbrella Policy' section shows an 'Umbrella' card with a 'Replace' button and a 'Last upload' section showing 'Henry-umbrella.pdf' with a date of '02/04/2025'. At the bottom right, a 'Confirm documents' button is circled in orange. A 'Security Policy' link is visible at the bottom left.

17 Review the important notice, and check off the box labeled "I have read and agree to the above"

The screenshot shows the 'Confirm documents' modal dialog. The title is 'Confirm documents' and the subtitle is 'Once you click "Confirm" your documents will be uploaded.' The main content is an 'IMPORTANT NOTICE' section with the following text: 'Before uploading, please confirm the following:'. Below this are three bullet points: 'I understand that **only documents uploaded now** will appear in the snapshot. (Re-upload even if added in a previous snapshot)', 'I have opened each document to make sure all pages are included.', and 'I have confirmed that no documents are missing for this household.' Below the bullet points is a warning icon and the text 'Adding documents later will use a full credit as a new case'. At the bottom of the notice section is a checkbox labeled 'I have read and agree to the above', which is checked. Below the notice section are two sections: 'Home policies' showing 'Johns Home.pdf' (3.4 MB) and 'Umbrella policies' showing 'Johns Umbrella.pdf' (274.9 KB). At the bottom right of the modal are 'Cancel' and 'Confirm' buttons. The background shows the 'Upload Documents' interface with the 'Confirm documents' button circled in orange.

18 Click "Confirm"

