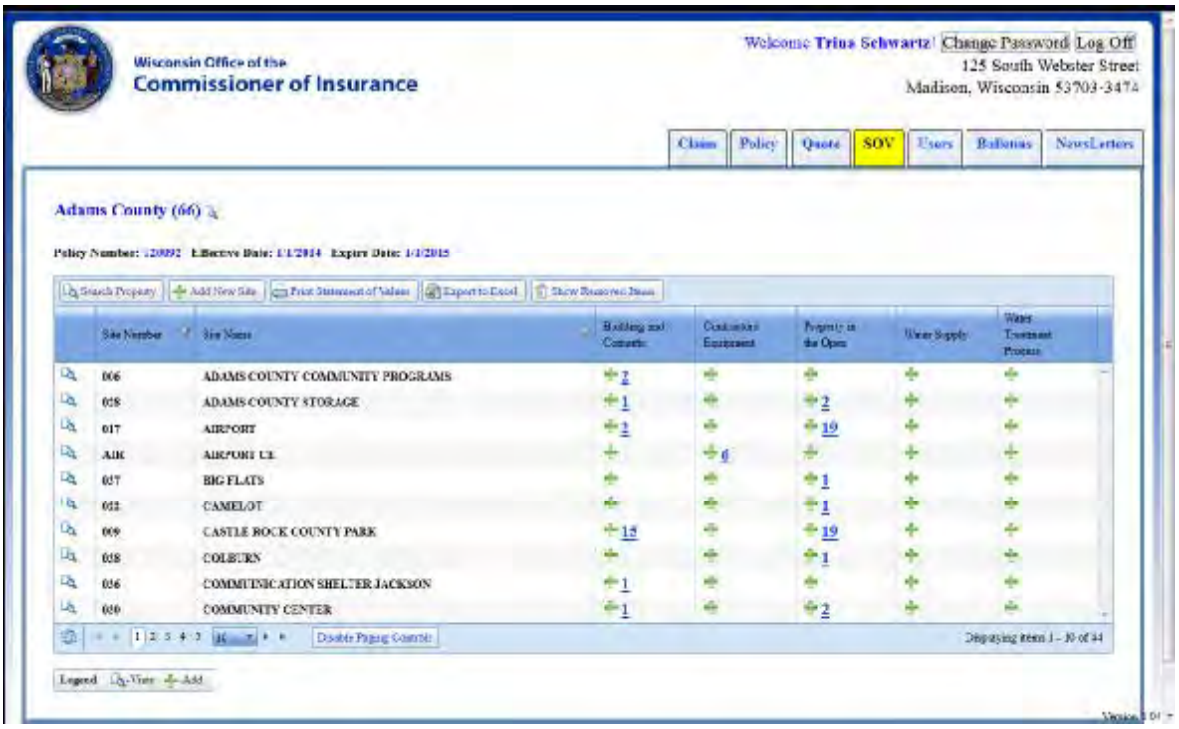
FMS – ADDING BUILDINGS

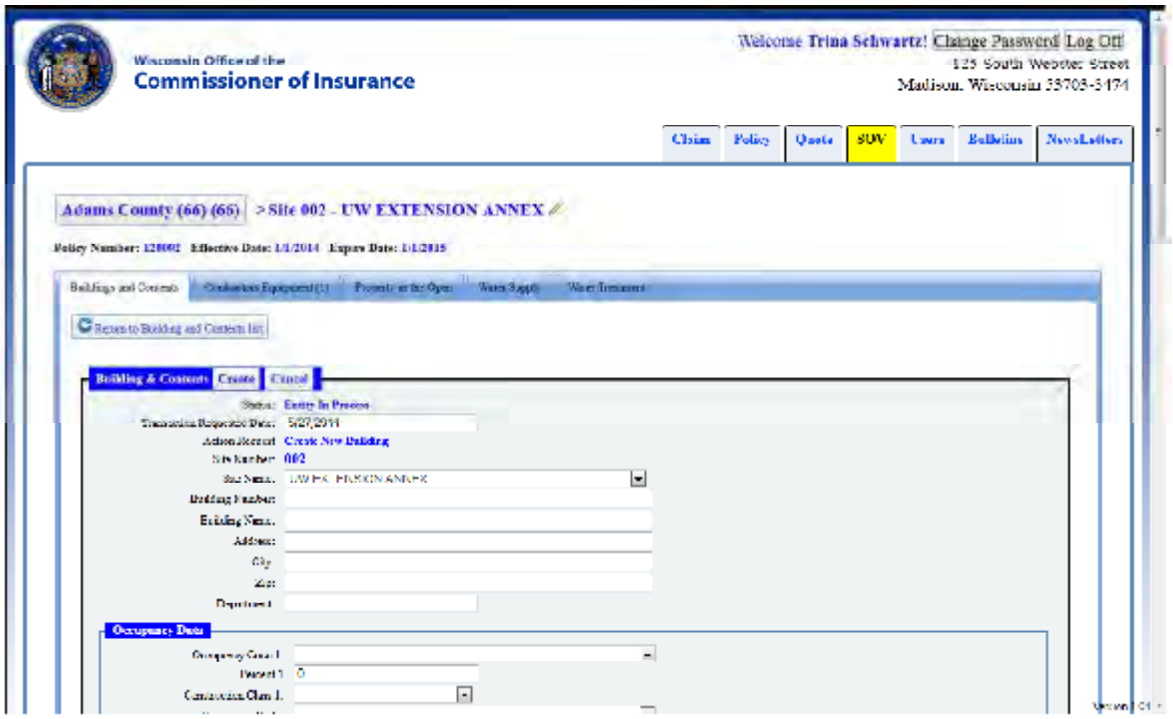
1. Login to FMS and click on your SOV tab.



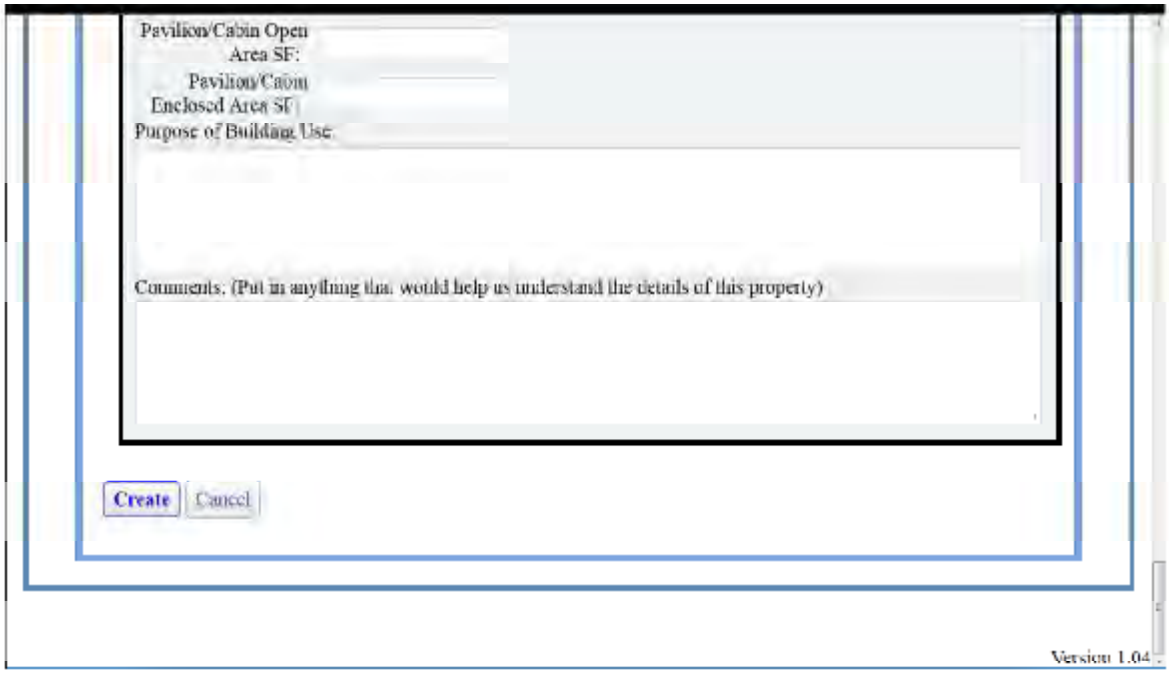
2. Find the site where the property is to be located.

3. Click the **green plus sign** in that site's row, in the buildings and contents column.

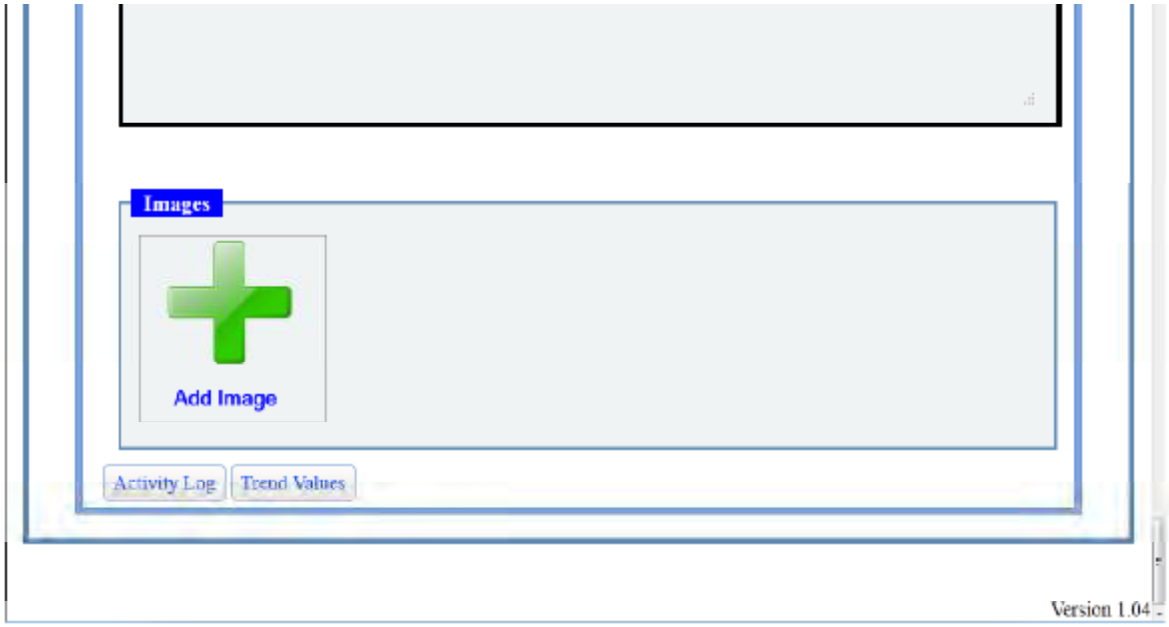
4. You are now in the new building form. Enter all information requested on the form.



5. After all information has been entered, click create at the bottom of the form. You can also click cancel at any time to back out of the form.

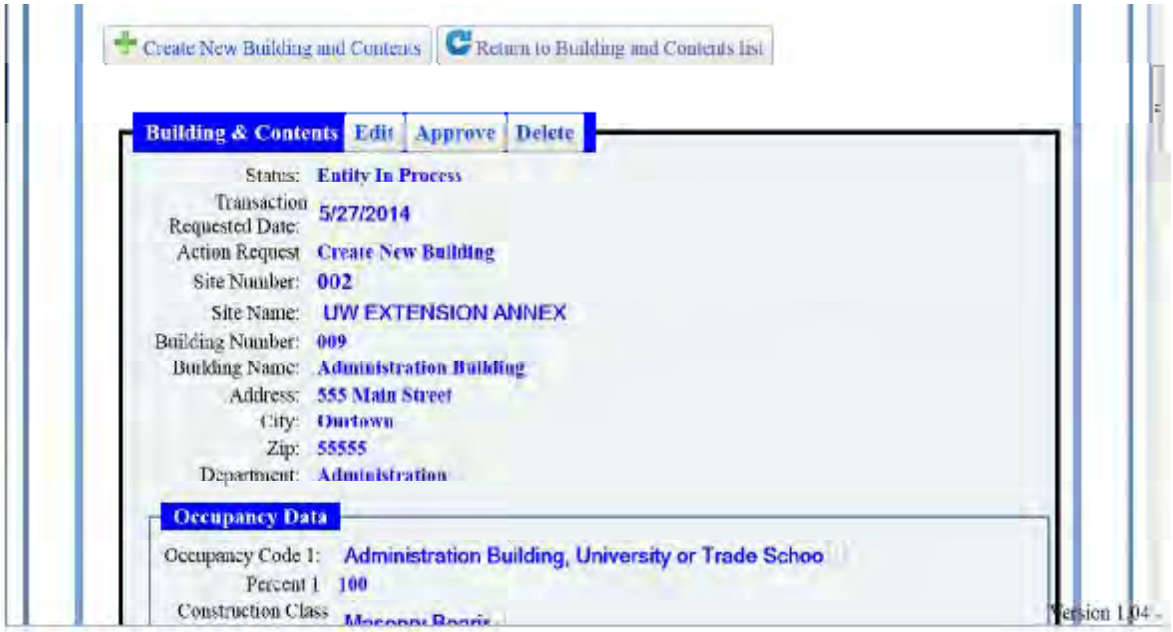


6. You will now be able to attach a picture. All new buildings require a picture before the form can be sent for valuation. Click Add Image at the bottom of the form.

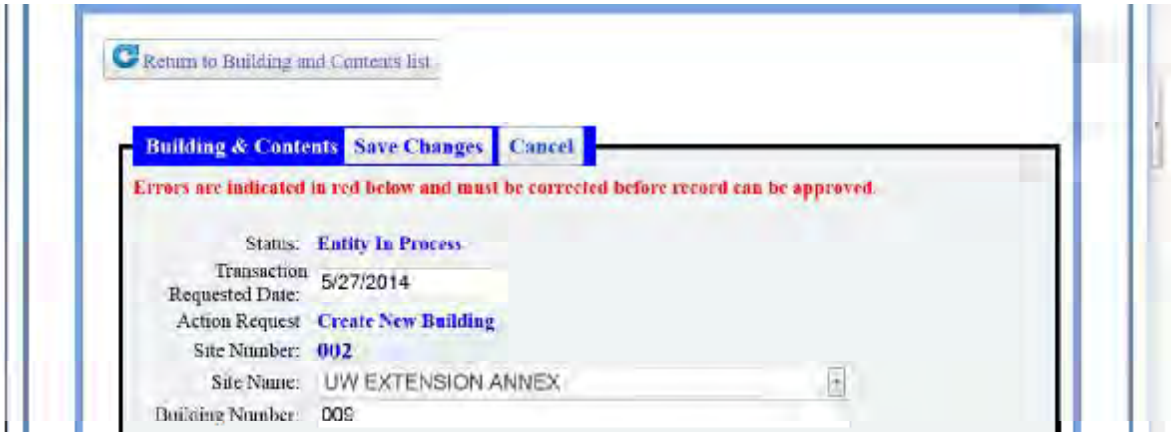


7. Double click the file you would like to attach and this will automatically add the picture to the form. You can click Remove if the picture was added in error. You can also continue to click Add Image and add as many pictures as you would like.

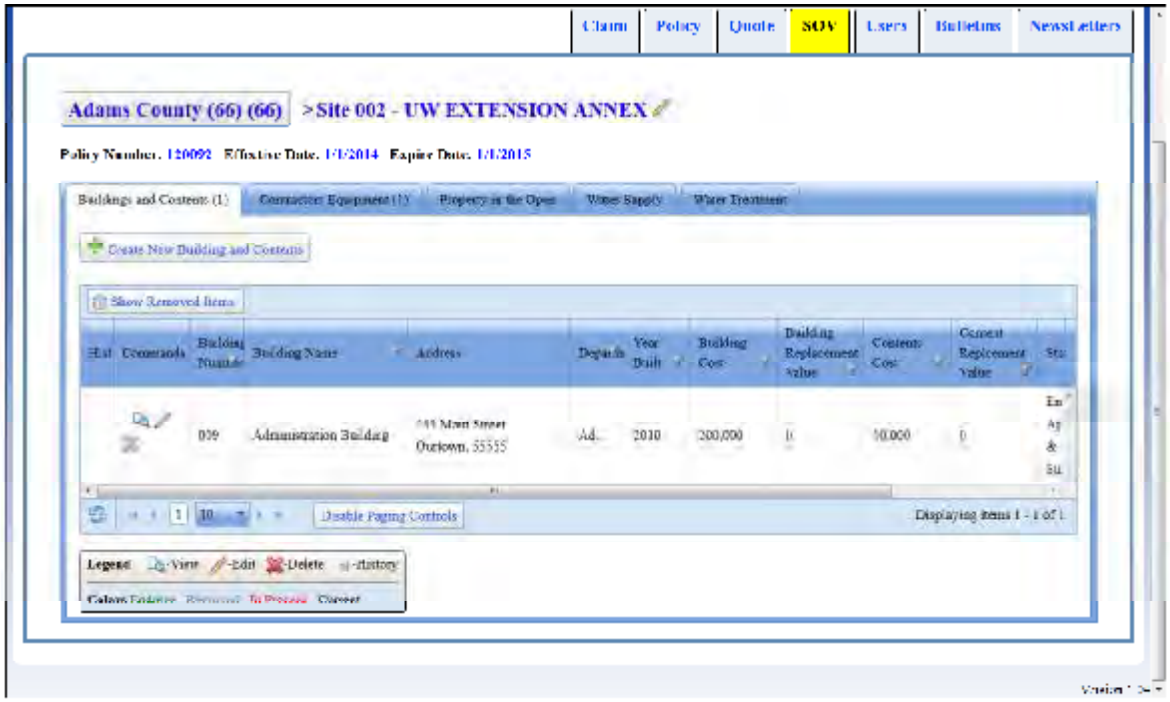
8. Scroll back to the top of the form and click Approve.



9. If any information is missing, or if there are any errors, you will see the following message in red at the top of the form: "Errors are indicated in red below and must be corrected before record can be approved."
10. If you need to enter additional data, you will need to click Save Changes after the remaining information is entered.
11. Click Approve after you have clicked Save Changes.



12. After you click Approve, you will be at this screen. This is a listing of all properties/equipment at that specific site.



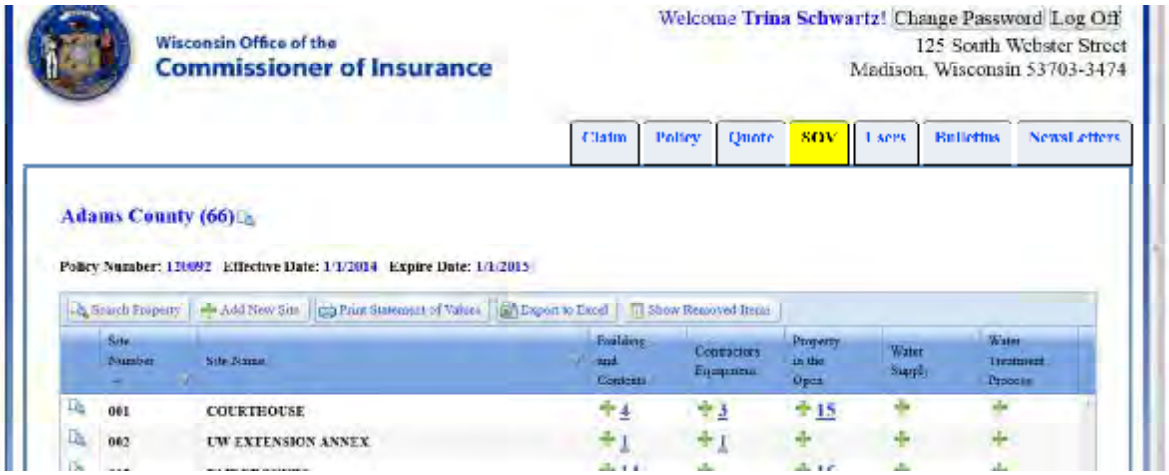
13. You can continue to add properties/equipment from this page, or you can click your Policy Name to return to your full site list.

ADDITIONAL NOTES

- Users can enter the information, but the Manager on your account is the only person who can **approve** a new form.
- The forms for Contractor's Equipment and Property in the Open vary slightly; however, the process is identical to adding a building.
- New buildings and many types of property in the open require pictures in order to be sent for valuation. Forms will NOT be sent for valuation until all required information including pictures are received.

FMS – Making Changes to an Existing Form

Please keep in mind that Users can enter the changes; however, the Manager on your account is the only person who can **approve** the changes.
Login to FMS and go to your SOV tab.



You first need to locate the property/equipment you would like to edit.

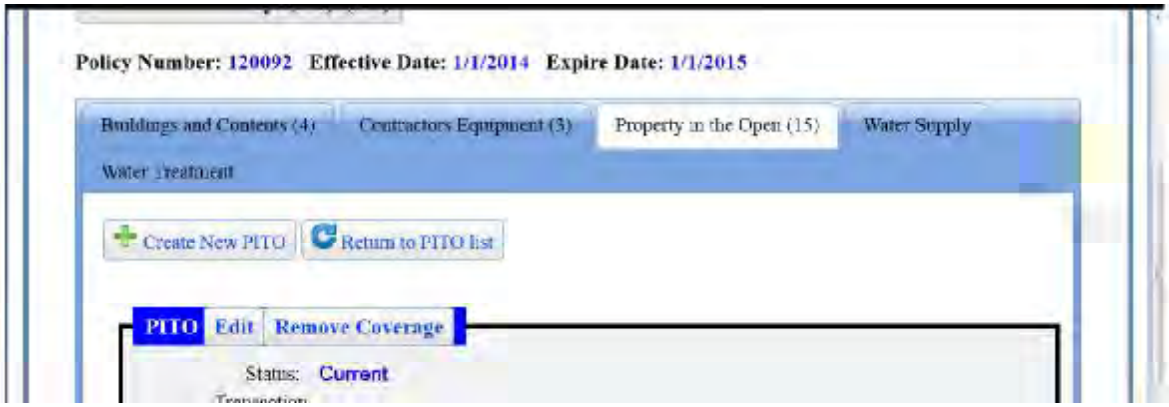
There are two (2) ways to locate your property/equipment. These instructions will fully detail both methods.

IF YOU DO NOT KNOW WHERE THE PROPERTY OR EQUIPMENT IS LOCATED:

1. If you are unsure where the property or equipment is located you can use the Search Property function located directly under your Policy Name and Policy Number.

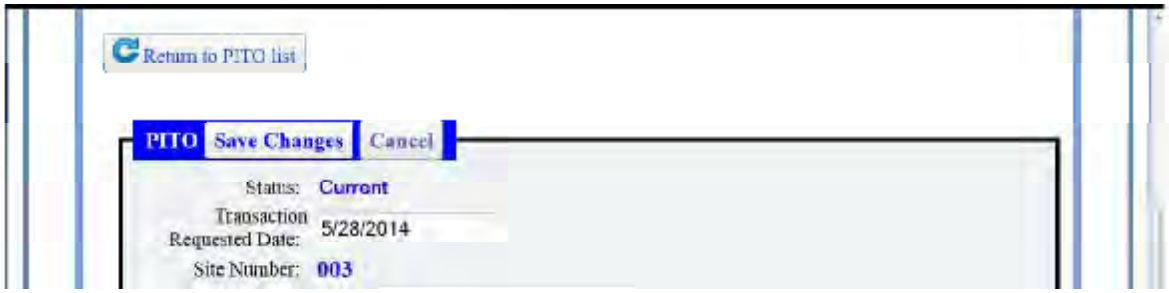
2. After you click Search Property, put your cursor in the search box and start typing a description of the property/equipment you are trying to locate. Arrow down and hit enter once you have selected the property/equipment.

3. Click Edit at the top of the form.

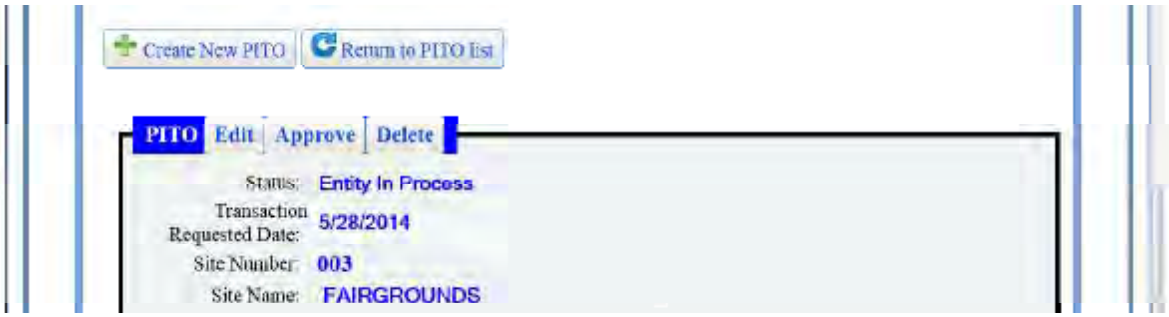


4. Enter your changes and make sure all fields are filled out correctly.

5. Click Save Changes once your changes have been made.



6. Click Approve at the top of the form.



7. The status for the item will now be Entity Approved and Submitted and the form will be sent to our office for review.

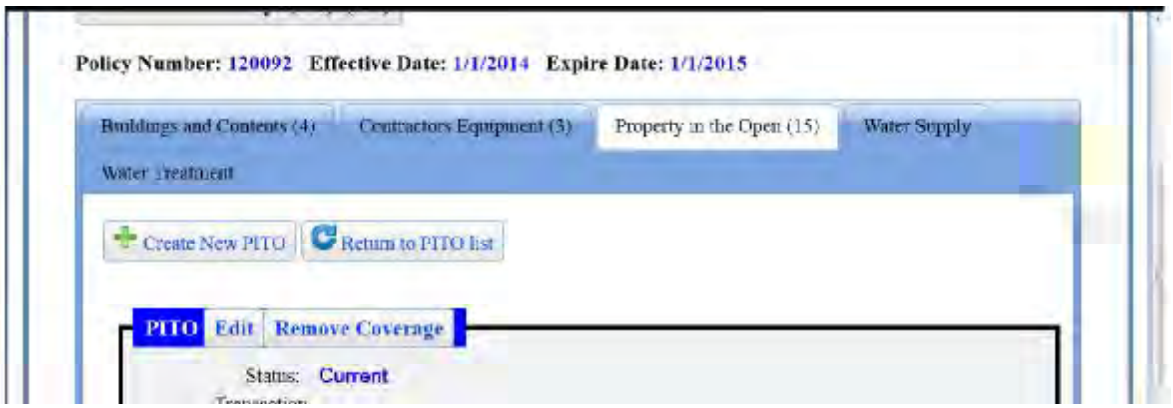
IF YOU KNOW WHERE THE PROPERTY/EQUIPMENT IS LOCATED

1. If you know the site where the property/equipment is located you can click the **number** in that site's row, in the corresponding column.

2. This will bring up a list of all items listed at that particular site.

3. Click either the pencil icon (Edit this record) or the paper and magnifying glass icon (View this record) to go into the form.

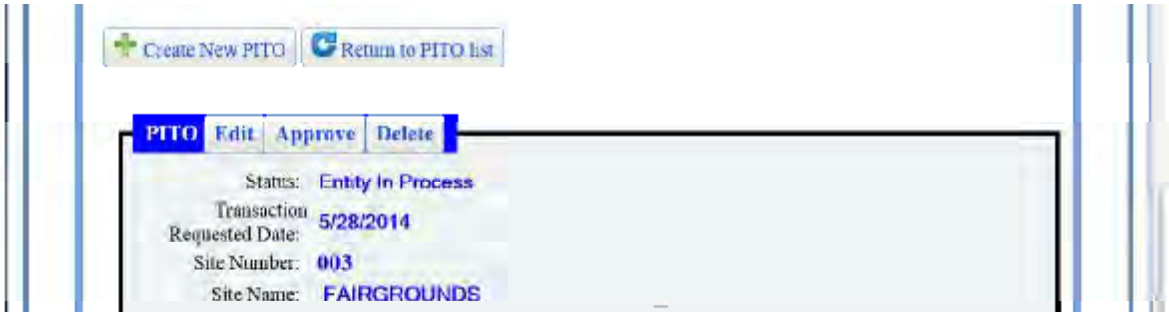
4. Click Edit at the top of the form.



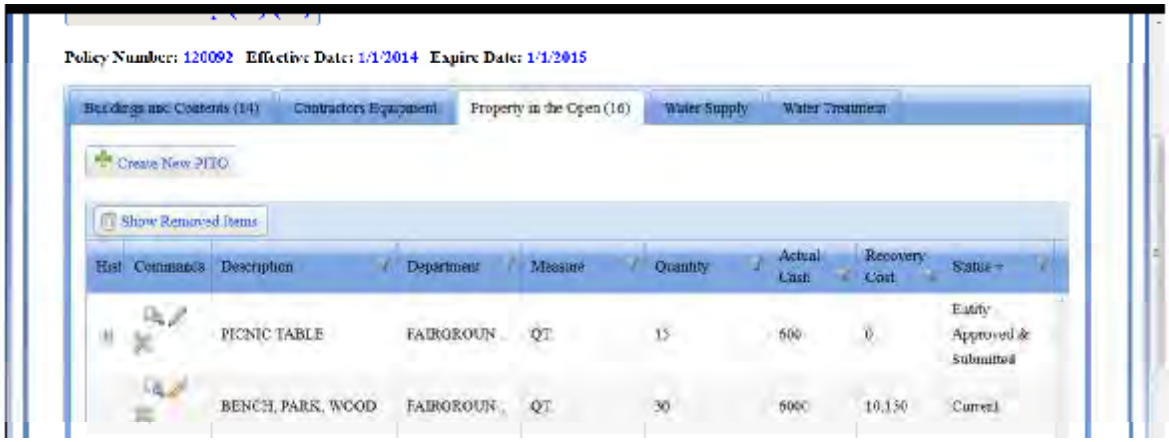
5. Enter your changes and make sure all fields are filled out correctly.

6. Click Save Changes once your changes have been made.

7. Click Approve at the top of the form.



8. The status for the item will now be Entity Approved and Submitted and the form will be sent to our office for review.



FMS – Requesting a Removal

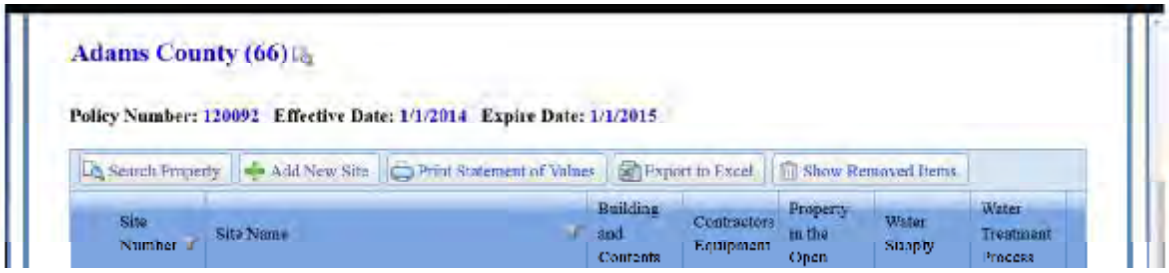
Please keep in mind that only the Manager on your account can request a removal. Login to FMS and go to your SOV tab.

You first need to locate the property/equipment you would like to remove.

There are two (2) ways to locate your property/equipment. These instructions will fully detail both methods.

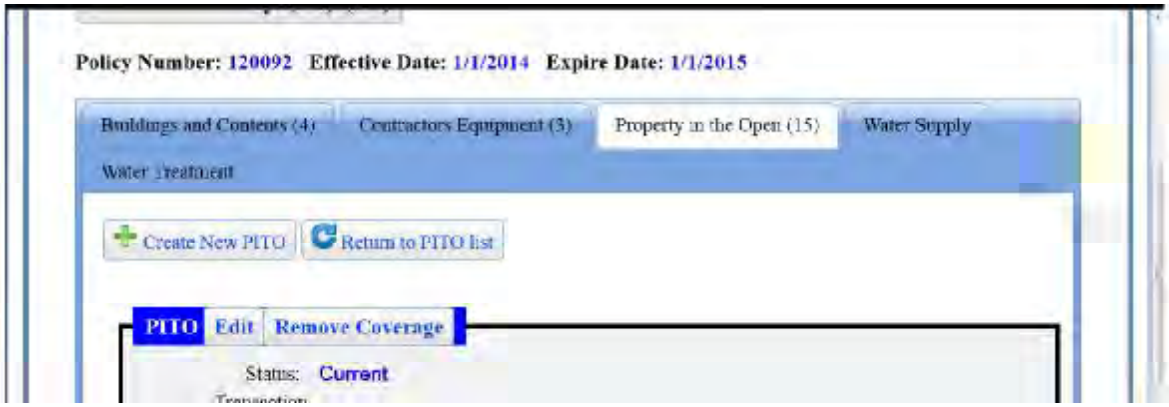
IF YOU DO NOT KNOW WHERE THE PROPERTY OR EQUIPMENT IS LOCATED:

1. If you are unsure where the property or equipment is located you can use the Search Property function located directly under your Policy Name and Policy Number.



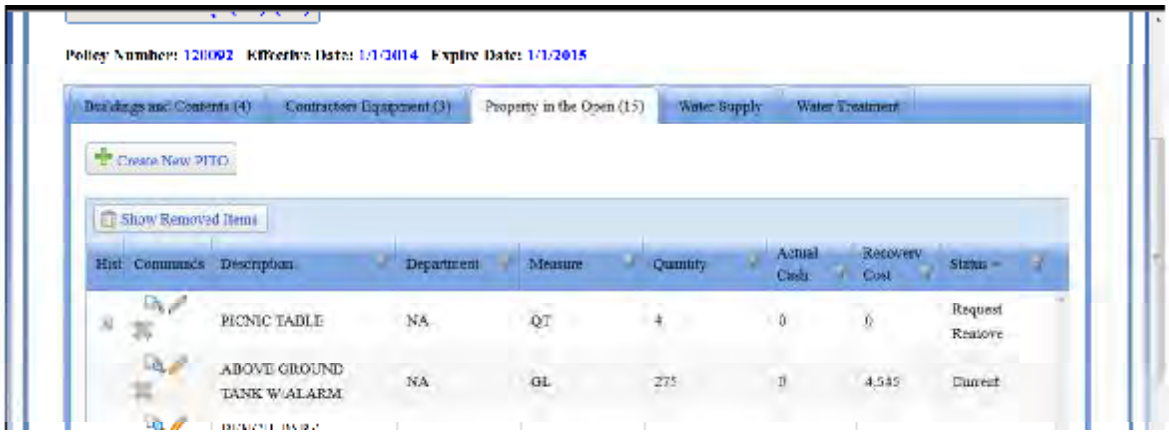
2. After you click Search Property, put your cursor in the search box and start typing a description of the property/equipment you are trying to locate. Arrow down and hit enter once you have selected the property/equipment.

3. Click Remove Coverage at the top of the form.



4. Click Complete Remove at the top of the form.

5. The status for the item will now be Request Remove and the form will be sent to our office for review.

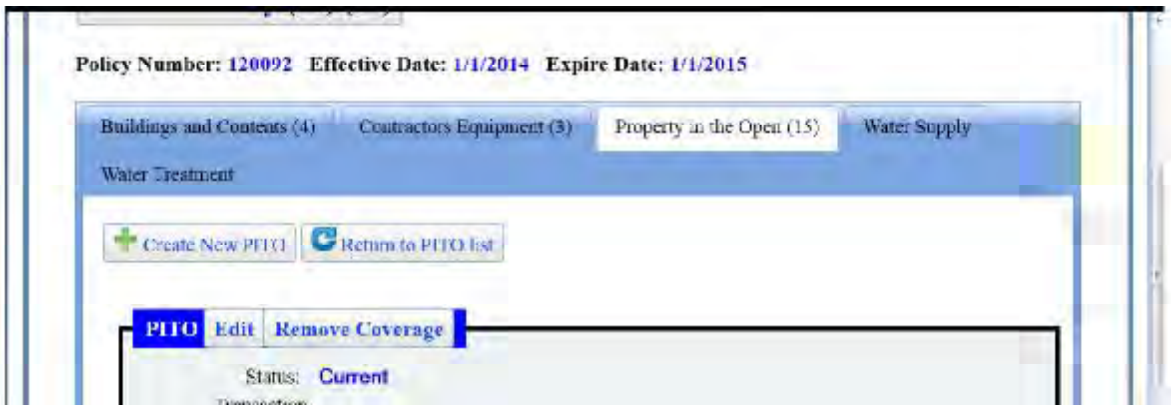


IF YOU KNOW WHERE THE PROPERTY/EQUIPMENT IS LOCATED

1. If you know the site where the property/equipment is located you can click the **number** in that site's row, in the corresponding column.

2. This will bring up a list of all items listed at that particular site.

3. Click the paper and magnifying glass icon (View this record) to go into the form.
4. Click Remove Coverage at the top of the form.



5. Click Complete Remove at the top of the form.

6. The status for the item will now be Request Remove and the form will be sent to our office for review.