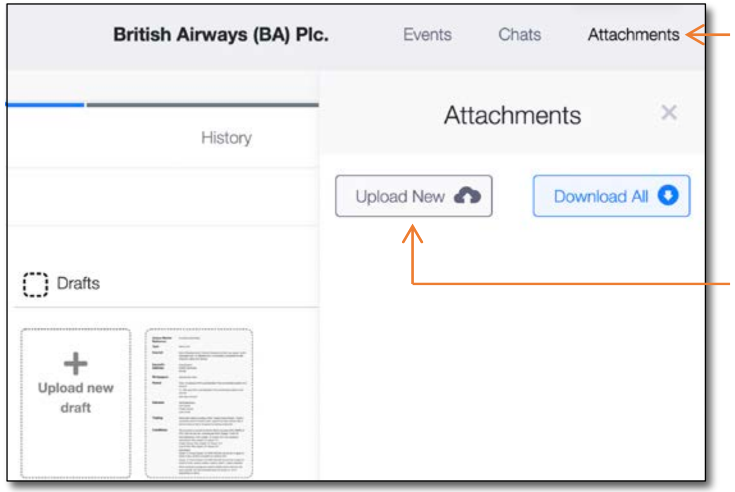
Choosing to Share Attachments as a Broker

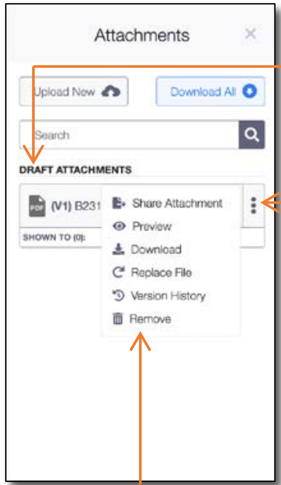
1.



Click on the Attachments button in the risk overview

Select 'Upload New' to add an attachment

2.

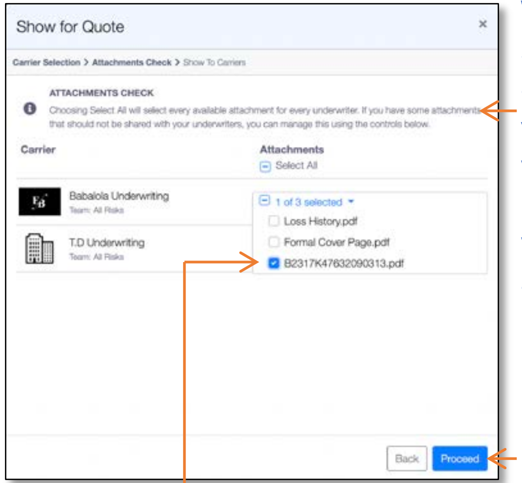


Attachments are marked as draft until they're shared

Click on the three dots to display the available actions for the attachment

You cannot remove an attachment after it has been shared

3.

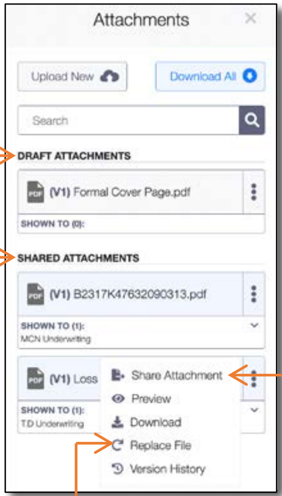


When showing a contract, you choose which parties see which attachments

Click 'Proceed'

Tick the checkboxes as appropriate

4.

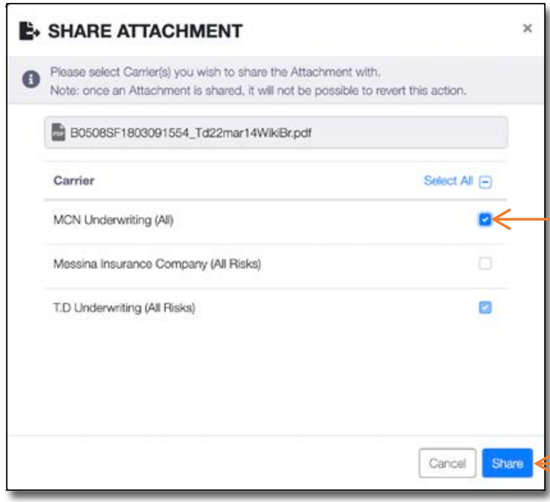


Draft and shared attachments are clearly listed in the attachments pane

Click on the 'Share Attachment' action to manually share an attachment with any carrier who has been shown the risk

Shared attachments cannot be removed but can be replaced

5.



Tick the checkbox next to the intended recipient

Click 'Share'

WHITESPACE
Verisk