





How to Import a Policy


From the Policies Menu, click “Import Policy”

 Policies

Q Search 11 policies  FILTER ▼ TOGGLE COLUMNS ▼ IMPORT POLICY

All policies available for import will populate in a list.

Import Policy From AMS ✕

Q Search 2 policies  FILTER ▼ TOGGLE COLUMNS ▼

POLICY NUMB... ▼	POLICY NAME	EFFECTIVE DATE	EXPIRATION DATE	INSURER	NAIC NUMBER	ACTIONS
<input type="checkbox"/> PROP0901	Commercial Proper...	Sep 1, 2021	Sep 1, 2022	Security National I...	19878	...
<input type="checkbox"/> BM09012021	Boiler & Machinery	Sep 1, 2021	Aug 29, 2022	BBSI Insurance	—	...

Find the policy you wish to import. Under the “Actions” dropdown menu, click “Import”.

Import Policy From AMS ✕

Search 2 policies FILTER TOGGLE COLUMNS IMPORT


POLICY NUMB... ↓	POLICY NAME	EFFECTIVE DATE	EXPIRATION DATE	INSURER	NAIC NUMBER	ACTIONS	
<input checked="" type="checkbox"/>	PROP0901	Commercial Proper...	Sep 1, 2021	Sep 1, 2022	Security National I...	19878	✕ ▼
<input type="checkbox"/>	BM09012021	Boiler & Machinery	Sep 1, 2021	Aug 29, 2022	BBSI Insurance	—	Import


You will be prompted to confirm the Policy details. In some cases, you may have to enter the NAIC Number (using the “NAIC Look-Up” button). When ready to import, click “Import”.

Import Policy ✕

POLICY NUMBER AMS Value: PROP0901 <input type="text" value="PROP0901"/>	POLICY NAME AMS Value: Commercial Property <input type="text" value="Commercial Property"/>	DESCRIPTION <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px;">Commercial Property</div>
EFFECTIVE DATE AMS Value: 09/01/2021 <input type="text" value="09/01/2021"/>	EXPIRATION DATE AMS Value: 09/01/2022 <input type="text" value="09/01/2022"/>	
INSURER AMS Value: Security National Insurance Co <input type="text" value="Security National Insurance Co"/>	NAIC NUMBER AMS Value: 19878 <input type="text" value="19878"/> NAIC LOOK-UP	

The policy will now display in the Policies list.

 Policies

 FILTER ▼ TOGGLE COLUMNS ▼ [IMPORT POLICY](#)

	POLICY NUMBER	POLICY NAME	EFFECTIVE DATE	EXPIRATION DATE ↓	INSURER	NAIC NUMBER	DESCRIPTION	ACTIONS
<input type="checkbox"/>	PROP0901	Commercial Property	Sep 1, 2021	Sep 1, 2022	Security National Insu...	19878	Commercial Property	...