

Note: Use a Google Chrome browser to achieve the best performance and pricing automation.

Provision the Policyholder

Determine if the policyholder has a smartphone or tablet and is willing to assist by taking a few photos of the loss. If so complete the following:

1. Enter the policyholder **Name, Email and Phone**.
2. Check the box **Provision Policyholder**.
3. Choose a provisioning method:
 - Email for tablets.
 - SMS (text message) for Phones.
4. Check the box **“Take Exterior Photos”** to prompt the policyholder to add exterior photos to the claim.

The screenshot shows a web form for provisioning a policyholder. It includes the following fields and options:

- 1** Policyholder Name: DemoName
- 1** Policyholder Email: PH@demomail.com
- Policyholder Phone Number: 519-555-1212
- 2** Provision Policyholder?
- 3** Encircle Link Delivery Medium:
 - Send via Email (recommended for Tablets)
 - Send via SMS (recommended for Phones)
- 4** Take Exterior Photos?
- 5** Enter Rooms to Document: (empty text box)
- 6** Kitchen Foyer
- 7**

5. Enter the **Rooms to Document**. Enter one at a time and press “Enter” or “Tab”.


6. Your entries will appear below. You can delete an entry by pressing the **X** to the right.



7. Press **Save Claim**. This will send the policyholder a link to enable provisioning. Go to the guided usage steps to help the policyholder complete the process.

Policyholder Guided Usage: Property

Guide the policyholder to open the provisioning link and take useful photos. (The following steps are provided for the policyholder to complete).

1. Find the SMS message or email message that was just sent.
2. Click on the **link**, which will open a web browser on the device.
3. Confirm the **rooms** show-up in the list. Click on a **room**, the device camera will open.
4. Hold the camera still, focus and tap the **camera button**. 

TIP Take panoramic overview photos.
No close-ups. Steady the camera and focus before pressing.

5. Press **OK** to save the photo or **Retry** to retake the photo.

TIP If the picture is out of focus or blurry try cleaning the lens or changing your angle. Press **Retry** to take the photo again

6. Press **ADD PHOTO** to take another overview photo.
7. Press **Done** after taking enough photos of the room.
8. Tap on the next **room** and repeat the process.

9. Close the browser when finished. (not critical).

Note: If the policyholder device has trouble completing the process try these few remedies:

- Check device storage and delete some videos & pictures.
- Reboot the device.
- Ensure Wi-Fi is in range, or cellular signal is good. 