

Review and Complete an Activity

In Brief

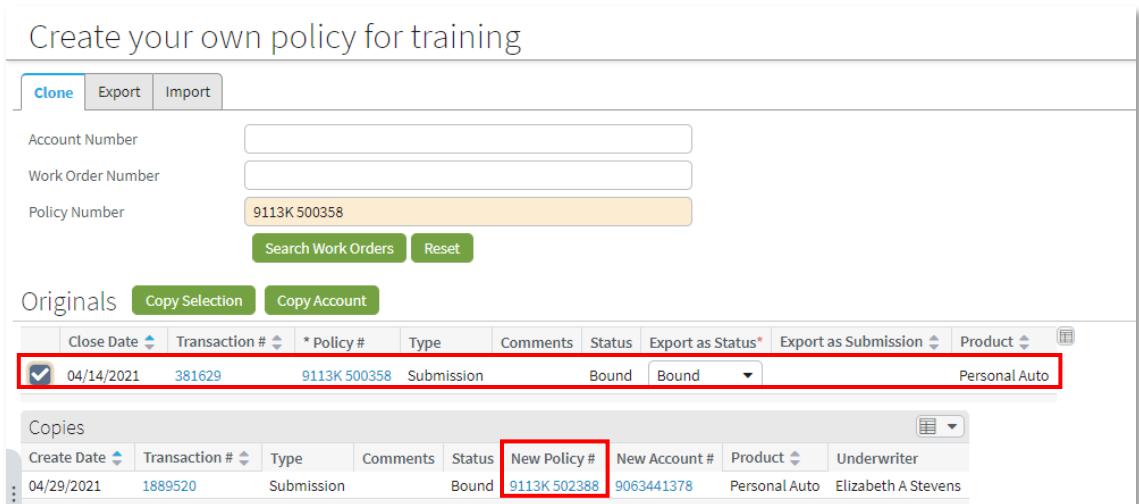
In this Quick Card, you will review and complete an activity using a Property policy.

Quick Card

IMPORTANT: This is a test environment. The next seven (7) steps are ONLY used in the VTO.

Clone a Policy

1. In the PolicyCenter VTO, click the down arrow to the right of the **Training** button on the **Tab Bar**. Select “Create your own policy for training” from the drop-down list.
2. Enter “**9113K 500358**” in the **Policy Number** field exactly as it is shown, including spaces and capital letters.
3. Click the **Search Work Orders** button.
4. In the *Originals* section, click the checkbox to the left of the **Submission** Transaction Type for the policy being cloned. In this example, select the checkbox to the left of Transaction #**381629**.



5. Click the **Copy Selection** button.
6. Scroll down, if necessary, to the *Copies* section.
7. Click the link in the **New Policy #** column.

IMPORTANT: PolicyCenter automatically created a **New Account #**. The new account is linked to the *cloned* policy, not the original.

Summary screen

NOTE: The activities on the policy appear in the *Current Activities* section of the cloned policy. Activities also appear on the *My Activities* screen. You can complete the activity from either of these screens. In this example, you will complete the activity from the *Summary* screen.

8. Click a **Trailing Documents Reminder** link in the *Current Activities* section.

NOTE: The activity opened on the *Quote* screen. The *Activity Detail* section displays at the bottom of the screen.

9. Review the activity.
10. Click the **View Notes** button to review the notes.
11. Click the **Return to Activity Detail** button
12. Click the **Complete** button.

NOTE: When the activity is completed, the *Activity Detail* section closes.

13. Click the **Policy #** link on the PolicyCenter Info Bar.
14. The activity is no longer listed in the *Current Activities* section of the policy.